Right PDF User Manuals

Right PDF Pro 6 (macOS)

Last updated: 2026/09/11

Chapter 1: Getting started

Download & Install

Right PDF is an all-around PDF multitool that can create, convert, edit, comment, annotate PDF and more. Feature-rich and affordable, Right PDF is your go-to choice when it comes to handling PDF documents.

This manual provides essential how-tos and instructions. You can also learn more about installation, activation and other Right PDF products/services.

System Requirements

- Intel processor/Apple M1
- macOS 10.15 and above
- 1GB RAM
- 3GB disk space

Download & Install

There are two ways you can access Right PDF:

1. Download installer from Right PDF website and buy a license, or
2. Subscribe to Right PDF on App Store.

If you choose 1, run the installer and follow the guide. You may need to remove other Right PDF products before installing a new one.

Feel free to contact support if you run into any download or installation issues.

Activation

If you get Right PDF macOS from our website, you get 14 days of free trial period. Most features will become locked when the trail period comes to an end unless you activate it with a valid license, which is usually found in your order confirmation email. ZEON does not collect or transfer any personal information during activation.

Online Activation

If your computer has internet connection, follow the steps below to activate online:

1. Run the app. Go to Menu Bar and choose “Right PDF” > “License Information”.
2. In " License Information," click "Activate".
3. Choose "License Code" and click “Online”. Your license code can be found in your order confirmation email, and it should look like this: AA11-BB22-CC33-DD44-EE55-FF66-GG77-HH88
4. Online activation complete.

Offline activation

This is the only way to activate Right PDF If your computer does not have internet connection. First you need to export an activation data file, move it to a computer with network connection, and upload it to our activation server. Here are the steps:

1. Run the app. Go to Menu Bar and choose “Right PDF” > “License Information”.

2. In " License Information," click "Activate".
3. Choose "Offline".
4. Enter the 32 digit License Code, then click "Activate". You will receive a confirmation e-mail that includes the license code after purchase.
5. Click "Next" to save the .htm file.

6. Copy the saved activation data file to any computer with internet access, and use a browser to open file.
7. Click "Upload" on the web page.
8. Click to download "License File" with .zna extension.
9. Copy the .zna license file back to the computer installed with Right PDF. Click the icon at the center of the window to open the license file (.zna).
10. Offline activation complete.

Note:

- The file ActivationData.htm can only be used to activate the product once. If you encounter error after clicking “Upload,” go back to step 1 and start over.
- If you have multiple activation data files, take the latest one.

Deactivation

One copy of license can only activate Right PDF on one computer. You should always remember to deactivate the software if you want to use it on a new computer, and use the newly released copy to activate on the new one.

Online Deactivation

If your computer has internet connection, follow the steps below to deactivate online:

1. Run the app. Go to Menu Bar and choose “Right PDF” > “License Information”.
2. In "License Information" window, click "Deactivate".
3. Choose "Online".
4. Deactivation complete.

Offline Deactivation

Without internet connection, your only option is to export an deactivation data file, move it to a computer with internet connection, and upload it to our activation server.

See the steps below:

1. Run the app. Go to Menu Bar and choose “Right PDF” > “License Information”.
2. In "License Information" window, click "Deactivate".
3. Click "Offline" to save the .htm file.
4. Click "Next" and copy "Deactivation Data.htm" to any computer with internet access. Open it with a browser.
5. Click "Upload".
6. Deactivation complete.

Updates, upgrades and maintenance

Updates

Users of full-function versions of Right PDF products are able to update within the same "Major" number version (e.g. v1.0 to v1.1). Updates are free and license code remains unchanged.

Upgrades

Users of full-function versions of Right PDF products can upgrade to a higher "Major" version (e.g. v1.0 to v2.0) by purchasing an upgrade from ZEON. Upgrade discount may be available at Right PDF Online Store for registered Right PDF users.

Maintenance

Software Maintenance Services (SMS) entitles you to the following:

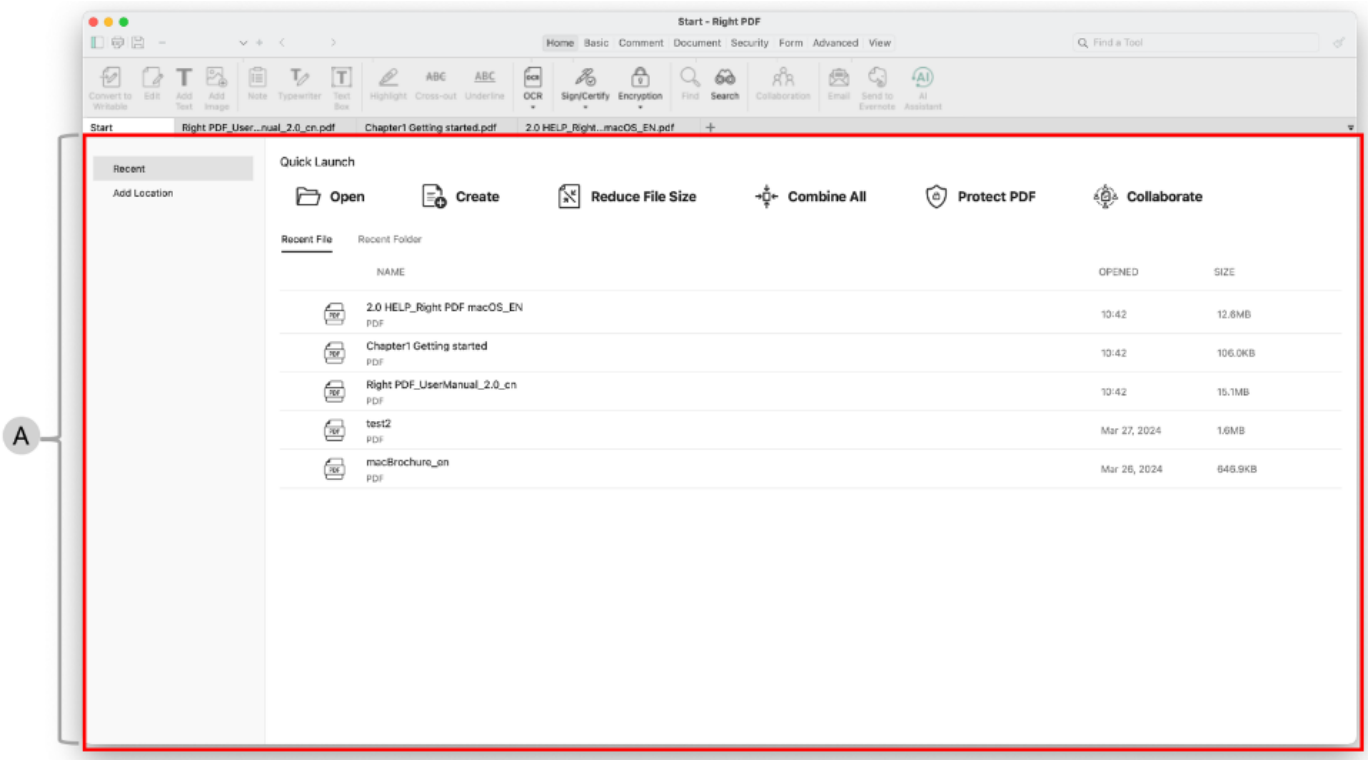
- **New Product Release Versions** - Keep up to date with free software upgrades. If you are planning on upgrading, it is more cost-effective to do so through SMS instead of purchasing a new version.
- **Same License Code** - Keep your original License Code for simple control and management.
- **Preferred Technical Support** - subscribers receive prioritized technical support.

Please visit Right PDF Online Store for more information about SMS.

Chapter 2: Workspace

Workspace basics

The Right PDF workspace contains 8 key areas, which are Home View, Apple Menu Bar, Ribbon tabs, Document tabs, Document message bar, Document pane, Sidebar Style pane, and Sidebar Navigation pane.





A. Home View

B. Apple Menu Bar

C. Ribbon tabs

D. Document tabs

E. Document message bar (this bar appears only when the document is signed or includes form fields)

F. Sidebar Style pane

G. Document pane

H. Sidebar Navigation pane

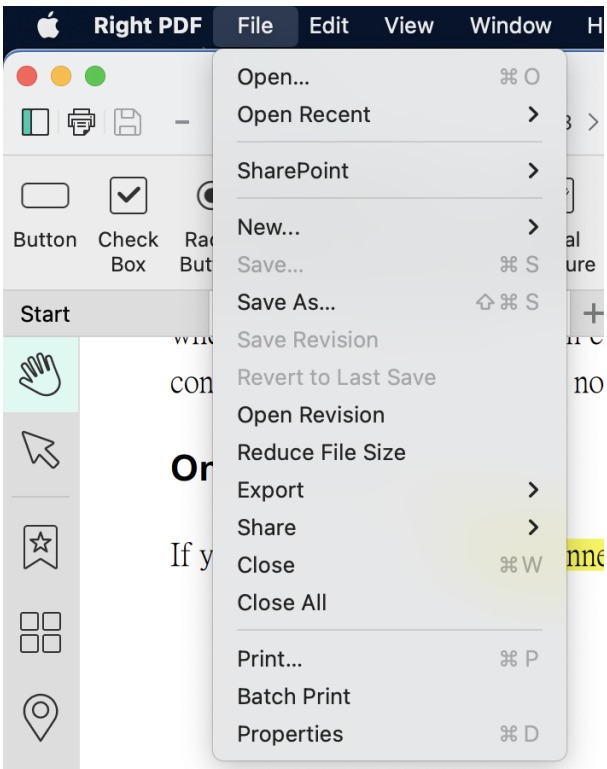
A. Home View

Start page shows when you click the Start tab or launch Right PDF without opening any document. This page provides quick access to recent files, commonly used tools and 3rd party cloud storage services.

B. Apple Menu Bar

Providing commonly used functions and commands, Menu Bar is located in the top-left of Right PDF window.

File:



- **Open…:** Browse to open a PDF.
- **Open Recent:** Choose and open a recent file. You can decide the number of items on the list in Preferences > General > Recent files.

- **SharePoint**: Check in, check out, or discard check out PDF filesin SharePoint.
- **New…**: You can create a blank PDF or a portfolio, or create PDF from file, scanner, clipboard or webpage.
- **Save…**: Save the document.
- **Save as…**: Save the document to a different location.
- **Save Revision, Revert to Last Save, Open Revision**: These enable you to manage versions.
- **Reduce File Size**: Reduce the size of the current file or multiple files by adjusting image quality.
- **Export**: Export current PDF to text, Word, Excel, PowerPoint, Open Document or image formats.
- **Share**: Share current PDF by email, message, AirDrop, or note.
- **Print...**: Print current file.
- **Properties**: View document properties.

C. Ribbon tabs

Right PDF employs ribbon design which provides sets of tools grouped together based on the purpose they serve. For example, if you wish to highlight a paragraph on a page, select Highlight on the Comment tab.

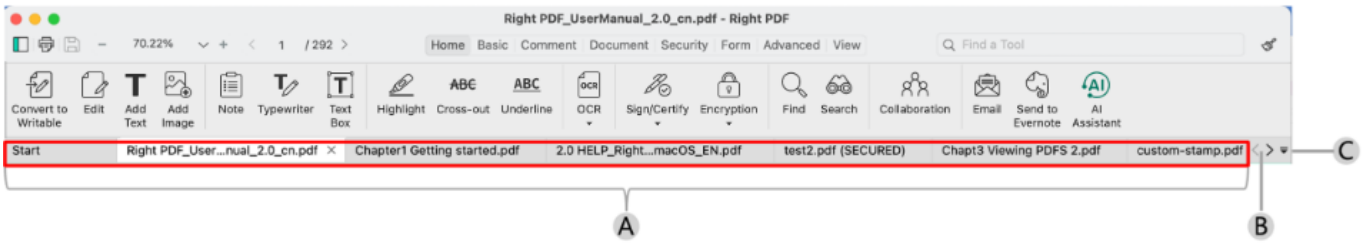
For a better reading experience, you can click the current tab to hide the toolbar and enlarge the document pane.

D. Document tabs

View multiple files as tabs

The tab bar displays currently open files as tabs below the ribbon area. You can open several files in the same window and use the left/right arrows at the far right of the tab bar to navigate, or reorder

files by simply dragging and dropping a tab within the same group. If you want to open one of the files in new window, drag the tab away from the bar and release.



A. Grouped open files B. Left and right arrows for navigating all open files C. A list of open files

The right-click menu of a Right PDF file tab provides the following actions:

- **New a Blank PDF**: Create a file that opens in a new tab.
- **Open File in New Tab**: Select a file and open it in a new tab.
- **Save Current/Save All**: Save the file you are currently viewing or save all open files in this window.
- **Combine All**: Combine all open files in the current window into one PDF document. This will launch the Combine Files dialog box where all open files (of the current window) are listed. Click the Convert button to start merging them into one.
- **Close Current Tab/Close All**: Close the file you are currently viewing or all open files in this window.
- **Print Current Tab/Print All Tabs**: Print the file you are currently viewing or all open files in this window.
- **Open in New Instance**: Open the current file in an new window. The file will be removed from the tab bar of the previous window.

The tab bar feature is on by default. You can deselect the Open documents as new tabs in the same window option at General > Startup panel of the Preferences dialog box to always open a document in a new window.

E. Document message bar

The document message bar at the top of the document pane appears only when there are interactive form fields and when the document has been signed. You may click the button to show or hide the Document Message Bar. If Document message bar is hidden, click the “Show notification” button to the left of the work area to reveal it.

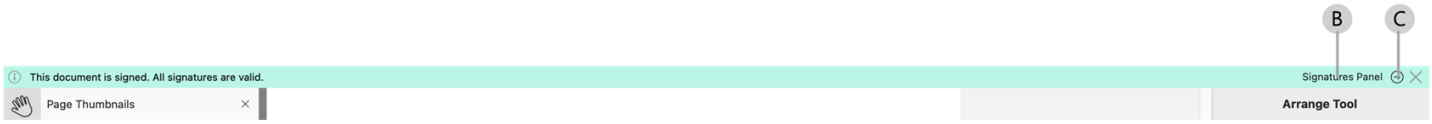
To locate where the form fields are within the file, click the Highlight Fields button (A) enclosed within the message bar or choose Form > Advanced > Highlight Form Fields to highlight all form fields, making it easier for you to see where they are.

The document message bar also informs you the document is signed. To get details of signature status, name of the signer, etc., click the Signature Panel button (B) enclosed within the message bar to open the Signatures panel in which all the details are listed.

As there might be signatures and form fields existing within the document at the same time, you can click the Next Notification button (C) to go to the next notification.



The Document message bar for form fields. Click the Highlight Fields button (A) to locate where form fields are within the document.



The Document message bar for signed documents. Click the Signatures Panel button (B) to open the Signature Panel where details of all signatures are listed. If there are multiple notifications, they will be displayed side by side.

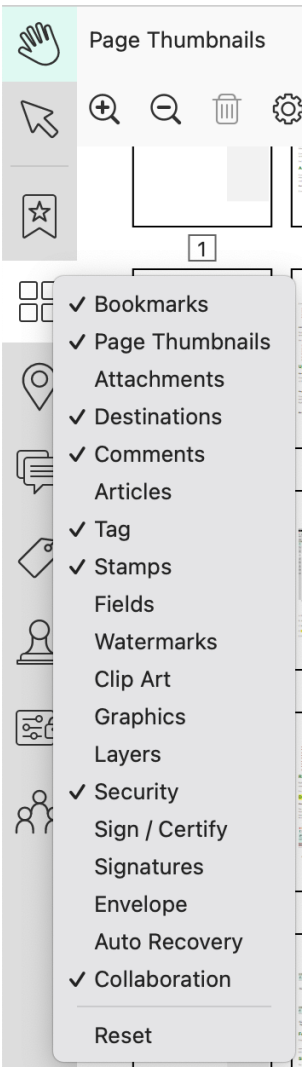
F. Sidebar Style pane

Format sidebar is located to the right of the work area and is hidden by default. It expands when you select an annotation or click Advanced> Edit, and shows the appropriate tools. Click the  icon in the top right corner to hide it.

H. Sidebar Navigation pane

The Sidebar Navigation pane includes 7 panels, Bookmarks, Thumbnails, Attachment, Comments, Stamps, Security, and Collaboration, which are listed vertically on the left side of the work area. If it doesn't show, click the  icon in the top right corner to expand it. With the exception of default panels, others will become visible in the sidebar only when an associated function is performed in a document. You can also customize the pane.

Right-click anywhere on the pane to show custom options, like hide, show or restore default settings.



1. **Hide panel**: deselect an item to hide it.
2. **Show panel**: select an item to show it.
3. **Reset**: click reset to restore default settings.

Document Properties

You can view and change the properties of the document in Document Properties, such as security settings, initial view, and description.

Do any of the following to open Document Properties dialog box:

- Choose File > Properties.
- Press Command + D

Document Properties dialog box

- **Description**
  - **Description:** This area shows the basic information about the current document: title, author, subject, base URL, keywords, and the time the document is created and modified. Right PDF supports **Extensible Metadata Platform** (XMP), which lets you embed metadata into documents themselves during the content creation process, so whoever works with you can easily get information about the files, such as document titles, author, descriptions, keywords, and copyright information. To start, click **Additional Metadata…** to edit and update the metadata.
  - **Advanced:** This area shows the application that produces the document, the PDF version, the page and file size, location, number of pages, whether the document has been tagged, and if the document is enabled for Fast Web View. The information in the Advanced area is generated automatically and cannot be modified unless **Inspect Document** is used to permanently remove Metadata and Embedded non-display data. Within Inspect Document, select Metadata to remove the entire Description area and information of PDF Producer from document properties.
- **Security**

  This shows the security settings and permitted actions of the current PDF. To change the settings, choose a method from the **Security Method** drop-down menu and apply it to the document.

- **Initial view**

  It decides how the PDF document is presented when it is opened, including the initial window size, the zoom level, the starting page number, and whether menu bar, toolbars and window controls are displayed.

  Note: if “Restore last view settings when reopening documents” (Preferences > General > Miscellaneous) is selected, all view settings are restored when reopening the document, overriding Initial View settings.

- **Custom**

  You can add your own property categories to the document.

- **Fonts**

  It lists the fonts and font types used in this document, and the fonts, font types, and encoding used to display the original fonts.

  If you don't like the current substitute fonts, you may want to install the original fonts on the system, or ask the author to embed the original fonts and generate a new document.

- **Advanced**
  - **Reading Options:** shows reading direction and language used in this document.
  - **Print Dialog Presets:** lets you create a print preset, so that you don't have to set certain options each time you print the document. Remember, in order to keep a print preset, save the PDF after it is created.
    - **Page Scaling:** It provides two options: **Default** and **None**. Default means **Fit to Paper** in the **Print Handling** section of the **Print** dialog box.
    - **Duplex Mode:** For duplex options to work properly, the selected printer should support duplex printing.
    - **Print Page Range:** You can determinate the **Page range** in the **Print Range** section of the **Print** dialog box.
    - **Number of Copies:** You can decide how many copies you want to print. Choose a number from 2 to 5, or choose **Default**, which means 1 copy.

Preferences

The Preferences dialog box lets you configure a wide range of settings, such as comment, forms, display, and security.

You can access it by pressing **Command + K** or choose **Right PDF > Preferences** to open the Preferences dialog box.

Accessibility

In the Document Colors Options area, check the **Replace Document Colors** box to enable settings for changing document appearance.

- **Use Mac Color Scheme**. Replace document colors using the macOS Color Scheme. Check this and you will see that the black-and-white document changes to match the color scheme you have chosen in System Preferences.
- **Use High-Contrast Colors**. Select a high-contrast color combination for text and background color.
- **Custom Color**. Specify a color for page background and a color for document text.
- **Only change the content in black/white color.** Check this box to make sure color schemes only apply to contents in black/white color.
- **Change the color of line art as well as text.** Check this to apply color schemes to watermarks, stamps, and drawings created by Draw Tools as well as text within the document, except for images.

Note: to display a document in its original color scheme, uncheck the **Replace Document Colors** box to restore.

General

Startup

- **Open documents as new tabs in the same window.** Select to enable opening multiple PDF files in the same window in different tabs instead of each file opened in an individual window. This setting in on by default.
- **Default PDF Application.** This section shows the current default PDF application. You can click **Set Right PDF as default PDF application** to see how to make Right PDF the default PDF application.

Page Display

- **Smooth.** Select whether to make text, graphics, lines, and images smooth.
    - **Smooth text**. Apply a type of text-smoothing.
    - **Smooth graphics**. Remove abrupt angles to make lines visually smoother.
    - **Smooth images**. Remove abrupt changes to make images visually smoother.
    - **Enhance thin lines**. Clarify thin lines to make them more visible.

- **Gray out text below ___ pixels.** Gray-out the text when the number of pixels is below the set value.
- **Use page cache.** Store page data to speed up page display. If this feature is on, you do not have to wait for a page to reload when you view that page again; the program has already stored the pages you have viewed.
- **Use logical page numbers.** Allow Right PDF to follow the page numbering printed on the page as opposed to the actual number based on total pages in the document. For example, the first page may have a printed number of A and will be listed as A (1 of 1) in the Page viewing controls bar, Pages dialogs and print dialogs. If this option is deselected, pages are numbered with Arabic numbers starting at 1.
- **Show Gaps Between Pages.** Determine whether to show the blank space between pages in a document.
- **Default Page Layout.** Set the page layout to be applied when you first open a PDF document. The default setting is Automatic. Note that the **Page layout** setting in **Document Properties** > **Initial View** (or File > Properties > More Properties) overrides this value.
- **Default Zoom**. Set the magnification level for PDF documents when they are first opened. The default setting is Automatic, and you can enter a value by choosing **Custom** . Note that the Zoom setting in **Document Properties** > **Initial View** (or File > Properties > More Properties) overrides this value.

Units & Grids

- **Page Units.** Set the unit of page display used in Right PDF. It could be Points, Inches, Centimeters, or Millimeters.
- **Guide Color.** Specify a color for guide lines.
- Set grid properties and color for grid lines. You can use the Ruler & Grid features to display or hide grids. See View and snap to grid.

Identity

- Enter your identity information that will appear on your digital ID stamps.

Full Screen

- **Advance every ___ Second.** Specify whether to move forward to the next page every given time interval. This is off by default. You can still use mouse or keyboard commands to page through a document even if this option is selected.
- **Loop after last page.** Return to the first page after the last one. The option is typically used for kiosk display.
- **Escape key exist.** Allow pressing the Esc key to exit Full Screen mode. If this option is not selected, exit with the shortcut Ctrl + L instead.
- **Left-click to go forward; right-click to go back.** Allow clicking mouse to page through a document.
- **Show navigation bar.** Determine whether to show the Navigation bar. Once enabled, you can define a desired corner position for it.
- **Mouse cursor.** Specify mouse behavior, such as Always Visible, Always Hidden, and Hidden After Delay, in Full Screen mode.
- **Background color.** Select a background color for the areas outside the pages in Full Screen mode.

Miscellaneous

- **Restore last view settings when reopening documents.** This option is checked by default. Right PDF restores the last view when reopening the document.
- **Open cross-document link in same window.** Click a cross-document link will open the document being linked to in the same window, minimizing the number of windows open. If the document being linked to is already open in another window, the current one will remain when you click the link.
- **Create links from URLs.** Enable this to have Right PDF automatically create hyperlinks from URLs.
- **Allow layer state to be set by user information.** Enable this to let the settings in the **Layer Properties** dialog box take effect. If you want to make all layer settings work, you have to turn this feature on and then click the **Show property** button  to set layer properties. (For example, if you don’t want to show layer An on-screen but want to print and to export to other applications, set the default to on, the initial visibility to never visible, and the initial print and export states to always print and always export.) Remember that you cannot apply any changes if this option is not selected.

- *Use Select tool as default instead of Hand tool.* Make the select tool default. If you deselect it, the default took will revert to Hand tool next time you open a PDF document.
- **Make Hand tool read articles.** This setting in on by default. Once placed over an article thread, the appearance of the Hand tool pointer will change. Upon the first click, the article expands to fill the document pane horizontally; subsequent clicks follow the thread of the article.
- **Hand Tool Double Click.** Determine how the document responds when clicking with the Hand Tool. If you select page down, double-click the page to jump to the next page; if you choose scroll down, double-click it to start scrolling down until the next mouse click.
- **Reset All Warnings. Restore all warning messages to default status.** Once you see a warning dialog box with the **Do not display this message again** checkbox on it, check the box to stop the dialog box from showing up again. To restore all warning dialog boxes, click the Reset All Warning button to have them show up again.

Recent Files

- **Maximum number of files in Recent Files list.** Set maximum number of files displayed in the Recent Files list. If you set 8, then only up to 8 files will be displayed in the **File > Open > Recent Documents**.

Auto Save

- **Automatically save document info with Auto Recovery every: ___ minutes.** The document will be saved periodically according to the time interval specified.

Watermark

- **Random variation range**. Set a random variation range (unit: point).

New Document

Set default format (like font, margins and page) for all new documents.

Signatures

Creation & Appearance. Control options for signature creation and set the appearance of signatures within a document. You can make changes to one or more signature appearances and store them for later use. Click **More…** and in the Creation and Appearance Preferences dialog box, do the following:

- **Creation.** Decide whether to make it compatible with Adobe Acrobat and then set the text fields to display **When Signing**, such as reasons, location and contact information, and timestamp. The selected fields are displayed in the Sign Document dialog box when attempting to sign.
- **Appearance.** Set the graphic options and the text fields to display in the appearance. Click **New…** and name the appearance by adding a title used to identify the appearance, and then set graphic options, text fields to display and text direction in the following sections:
    - **Configure Graphic**. Choose to show nothing, an image, or the signer's name from the certificate. If you want to display nothing in your signature, select **No graphic;** otherwise, select **Imported graphic** to show an image in the appearance. Click **File…** and browse to a file to be used as the image and click **OK**.
    - **Configure Text.** Decide what to display in the appearance:
        - **Name.** The name of the signer.
        - **Location.** The location associated with the identity configured in Right PDF.
        - **Distinguishing Name.** A name with identifiable information such as country, organization, organization unit, and so on.
        - **Labels**. A label for each of the items above. For example, Digitally signed by, Location, Date, etc.
        - **Date.** The date the file is signed. It displays local computer time.
        - **Reason.** Reasons for signing.
        - **Logo.** Display Right PDF logo on the background of the signature.
    - **Text Properties.** Choose a direction (Left to right/Right to left) that is appropriate for the signer's language.

Verification. Control how and when signatures are verified. Click **More…** and in the Signature Verification dialog box, select **Verify signatures when the document is opened** (selected by default) to validate all signatures automatically in a PDF when the document is opened for the first time.

- **Verification Behavior.**
    - **When Verifying.** This allows you to choose a method to use for verifying signatures.
    - **Require certificate revocation checking to succeed whenever possible during signature verification.** This checks certificates against a list of excluded certificates during

validation. If this option is deselected, the revocation status for approval signature is ignored. This option is selected by default.

- **Verification Time.**
  - **Verify Signature Using.** Decide how to check the digital signature for validity. **Time at which the signature was created** is selected by default, meaning you can check the time based on when the signature was created. You can also choose to check based on the current time or the time set by a timestamp server when the document was signed.
  - **Use expired timestamps.** It allows using the secure time provided by the timestamp or embedded in the signature even though the signature's certificate has already expired.
- **Verification Information.** Decide whether to save additional verification information to the signed document for extending signature validity.
- **macOS Integration.** Choose to trust all root certificates in the macOS Certificate Store for validating signatures or certified documents.

Identities. Create and manage identities for signing. Click **More…** to view details of all your digital IDs in the Digital ID List dialog box.

Document TimeStamping. Configure a default Time Stamp Server if you want to embed a trusted timestamp when signing. If you are in a workgroup, your system administrator may provide you with information on how to configure a Time Stamp Server. Select one of the entries above and click **Edit** to view or change settings, or click **Add** to add and configure a Time Stamp Server. Select a default server using **Set as Default**. If you have set a time stamp server as default, it will be used whenever you sign.

Security

- **Configure Server Settings.** Click **More…** to configure Timestamp Servers/ Directory Servers. In the **Server Settings** dialog box, choose the servers to configure from the panel to the left.
  - **Directory Servers.** Directory Servers can be used to search for contact information and certificates when managing your list of Trusted Certificates and when encrypting documents using Certificate Security.
    Select one of the entries above and click **Edit** to view or change settings, or click **Add** to add and configure a Directory Server. When performing a directory search, all servers in

your list will be searched until a match is found. You can select a server and click **Set as Default** to make it the default server.

- **Time Stamp Servers.** Configure a default Time Stamp Server if you want to embed a trusted time stamp when signing. If you are in a workgroup, your computer administrator may provide you with information on how to configure Time Stamp Server. Select one of the entries above and click **Edit** to view or change settings, or click **Add** to add and configure a Time Stamp Server. Select a default server using **Set as Default**. If you have set a time stamp server as default, it will be used whenever you sign.

- **Security Settings**
  - It allows you to export and import security settings.
    - **Export**. Click the **Export** button and select the settings to export in the **Export Security Settings** dialog box and then click
  - **Import**. browse to a .zeonsecuritysettings file and open it. As the current settings will be overwritten by the settings within the imported file, make sure that it comes from a trusted source and the setting meet your requirements.
  - **Load security settings from a server**. This lets Right PDF regularly check for updates of security settings distributed periodically by your organization. Configure the following settings to let Right PDF check the server periodically via http or https. The default frequency is every week.

Forms

- **Automatically calculate field values.** Enable this to have mathematical operations assigned to form fields automatically updated. For example, if you select **as the sum (+) of selected fields** as your calculation method, the sum of the values in the selected fields will be displayed in the targeted field.
- **Show focus rectangle.** Display the form field with focus. If this option is selected, a dotted square appears as your click a button, a check box, a radio button, or a list box with **Hand**
- **Highlight form fields when document is opened.** Form fields are automatically highlighted in a color you specified every time a document is opened.
- **Show outline hover for fields when mouse enter.** If this box is checked, form fields will be outlined in black when the cursor hovers over them.

- **Fields highlight color.** Specify a color and then use **Highlight Fields** enclosed within the document message bar to have all form fields highlighted in the color you specify. You can also select **Form > Advanced > Highlight Form Fields** access it.
  For more information, see Form preferences.
- **Required fields highlight color.** Specify a color to highlight fields which are set as required.
  For more information, see Form preferences.
- **Auto-Complete**. If this feature is on, the text field drop-down menu offers you relevant options based on the entries you have previously entered, helping you fill out the form quickly. You may check the **Remember numerical data** box to begin storing the numbers.
- **Edit Entry List…**. Determine the options shown in the Auto-complete drop-down menu. This option is available only when there are text field entries already. To remove an entry from the list, in the Auto-Complete Entry List dialog box, click one of them and click Remove; to clear the entire list, click Remove all.

Document

Write

- In **AutoCorrect Options**, check **Capitalize first letter of sentences** to make the first letter of each sentence capitalized.

Inspect Document

- **Inspect Document when closing document.** Check this to launch Inspect Document when closing document. If this option is selected, the Inspect Document dialog box shows up and lets you choose what to remove from the document before it is closed.
- **Inspect Document when sending document by email.** Check this to run Inspect Document when sending documents by email. Select **File > Share > Mail as Document/ Mail as Flatten** to show the Inspect Document dialog box, and then you can choose what to remove from the document.

Redaction

- **Adjust filename when saving a document with newly applied redaction marks. Add prefix and suffix to** make redacted files more recognizable.

Spell Check

Check spelling while typing. Determine whether to check spelling while typing and specify its underline color. Then, select the dictionaries to use for spell check from the list. You can arrange the dictionary search order using the Up and Down buttons.

AI Assistant

OpenAI

- **Key**: Enter your OpenAI API key.
- **Model**: Select a model.

Microsoft Azure OpenAI

- **Use Microsoft Azure role-based access control (Azure RBAC)**: Once checked, your identity will be verified by signing in to your Azure account.
- **Key**: Enter Azure OpenAI API key. You can find it in **Keys and Endpoint**, under Resource Management in Azure Portal.
- **Endpoint**: Enter endpoint. You can find it in **Keys and Endpoint**, under Resource Management in Azure Portal.
- **Chat Deployment Name**: Give the chat deployment a name.
- **Embedding Deployment Name**: Give the text embedding deployment a name.
- **Model**: Select the version of the model.
- **Check Setting**: Click to check if the AI â€‹â€‹Assistant is set up correctly.

Movie

Multimedia

- **Preferred Media Player.** Set a default media player for viewing movies embedded in the PDF.
- **Accessibility Options.** Determine whether to show supplemental text captions and/or audio description, and/or play dubbed audio when available.

- **Remove All Trusted Documents.** Remove the documents currently in the Trusted Documents list. When a movie within PDF is played, a dialog box will appear and ask you to either play only the movie or add the PDF to Trusted Documents. If you select the latter, you will not see the dialog box when playing movies in that document.

Edit Text & Images

Click the Choose Image Editor… button to choose an application for editing images in PDF. Otherwise you will not be able to modify images.

JavaScript

- **Enable JavaScript.** Choose to enable or disable running JavaScript. This option is selected by default.
- **Allow JavaScript in documents with trusted certificates.** Allow JavaScript to run only if the document has a valid signed certificate.

Comment

Comment

- **Comment Default Appearance.** Click the **Reset Comment Defaults** button to restore all comment appearance settings to default. You are required to restart Right PDF to let the new settings take effect.

- **Text Box Default Font.** Determine font name, font size, underline, and font color for Basic tools such as Typewriter, Text Box, and Callout.
- **Text Box Default Align.** Specify the text aligning position for Basic tools such as Typewriter, Text box, and Callout text boxes.

Commenting

- **Always use Log-in Name for Author name.** If you select this box, the Login name (File > Preference > General > Identity > Login Name) becomes the author name in the pop-up notes. If this option is deselected, the author name in the annotation Properties will be used. This setting in on by default.
- **Create new pop-ups aligned to the edge of the document.** Align new pop-up notes to the edge of the document pane. If this option is not selected, pop-up notes appear right next to the annotations you make.
- **Copy encircled text into Drawing comment pop-ups.** The text within the area created by Draw Tools such as Oval, Rectangle, Polygon, and Cloud, will be automatically copied to the pop-up notes. This does not apply to tools that cannot create an area, such as pencil, line, or arrow.
- **Copy selected text into Highlight, Cross-out, and Underline comment pop-ups.** The text selected by Highlight, Cross-out, or Underline tool, will be automatically copied to their text markup pop-up notes.
- **Automatically open comment pop-ups.** Pop-up notes appear immediately when comments are created; otherwise, you need to double-click to open them.
- **Enable text indicators and tooltips.** When the cursor is over a comment that has a pop-up note, a tooltip will appear, and it contains the author name, comment status, and two lines of the text. This setting is on by default.

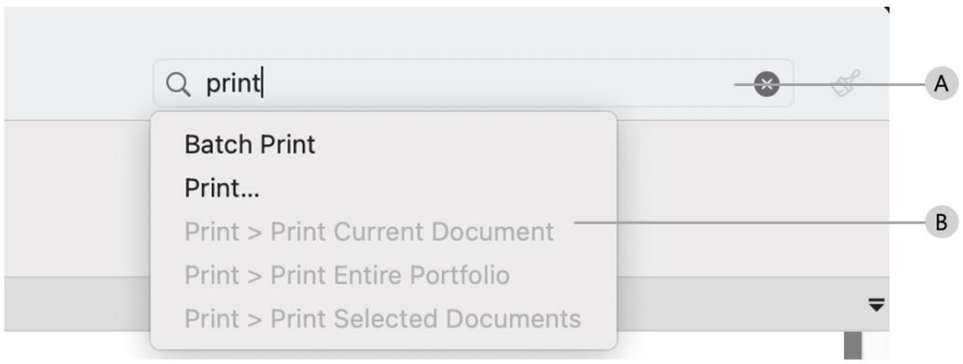
Collaboration

- **Online Collaboration**: enter the address of the root server to which the collaboration server connects in the **Server** filed. If left blank, the service will connect to server operated by Right PDF instead.

Find a Tool

Right PDF offers a wide range of features. The Find a Tool feature quickly locates the feature you are looking for and lets you use it directly.

1. Open Right PDF and the **Find a Tool** field can be found in the top right corner of the window.
2. Click the field and type in the name of the tool (or just part of it) and the menu will automatically show matched results which you can choose one from.
3. The feature will be automatically highlighted and enabled in the Ribbon area so that you can directly apply the feature to the document.



ï¼ï¼ŽFind a Tool search field B. Search result

Custom Shortcut Keys

Shortcut keys can help you quickly navigate commands and tools within Right PDF, which allows you to view, edit, add and remove those keys. You can use the default keys or customize them yourself.

To add/edit commands

1. Click **Help > Keyboard Setting** and open Keyboard Setting dialog box.
2. Select an item from the **Category** list to the left and select a command in the **Command** list to the right.
3. Place the cursor within the Set Shortcut Key box, and press the desired key combination on the keyboard (usually begins with Command key). For example, pressing Command and H together will make Right PDF check if the combination is still available (assigned combinations are shown below the box). If not, you won’t be able to use the combination.
4. Click **Assign** and the new shortcut key appears to the right of the command.

5. Click OK to close Keyboard Setting dialog box.

To remove/reset commands

1. Click **Help > Keyboard Setting** and open Keyboard Setting dialog box.
2. Select an item from the **Category** list to the left and select the command that you want to remove in the **Command** list to the right.
3. Click **Remove** to delete shortcut key. You can also click **Reset All** to restore settings to their defaults by removing all custom shortcut keys.
4. Click **OK** to close Keyboard Setting dialog box.

Chapter 3: Viewing PDFs

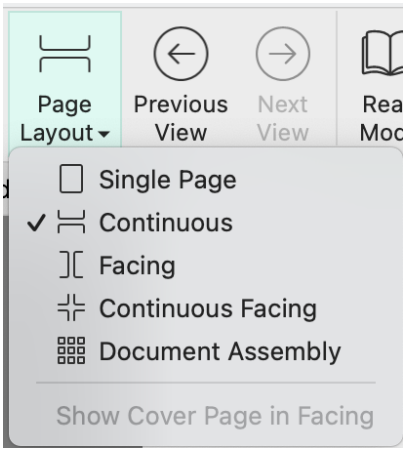
Adjust PDF views

Change the page view

Right PDF provides page layout, view modes, view rotation options and other features to let you decide how you are going to read the document.

Change the page display options

On View tab, in Page Layout drop-down menu, select one of the following page display options. You can use the left and right arrow keys to navigate within a PDF file if files are opened in Single Page, Continuous, or Document Assembly page display mode.



*Page display options in the **Page Layout** drop-down menu*

- **Single Page**: display just one page at a time without any portion of the previous and next page.
- **Continuous**: display pages in one long column so that you can smoothly scroll through the document without sudden transitions.
- **Continuous Facing**: display two pages facing each other and placed side-by-side with continuous scrolling enabled.

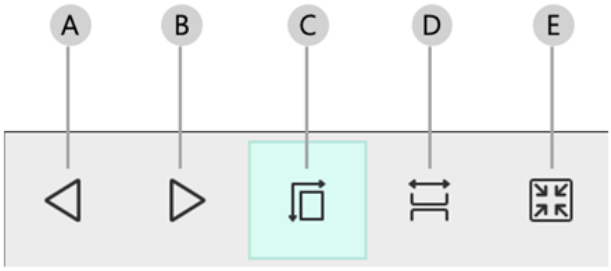
- **Facing**: display two pages placed side-by-side at a time.
- **Document Assembly**: display all pages at a time in the Document pane.

Read in Full Screen Mode

Click Full Screen Mode in the View drop-down menu in Menu Bar, or press Command + L on the keyboard to start Full Screen mode, meaning the document occupies the entire screen without showing the application frame. The pointer still works in full screen mode so that you can click links and open notes.

In Full Screen mode, a toolbar will show when you move the cursor to the bottom right, and you can:

- To go back to the previous page, click Previous , scroll up, or press the upward arrow key; to go to the next page, click Next , scroll down, or press the downward arrow key.
- Click Exit , press ESC (you must check **Escape Key Exist** in Fullscreen under Preferences), or use Command + L to exit Full Screen Mode.
- To adjust page view size, click Single Page to show one page at a time; or click Continuous to fit the window size and scroll pages continuously.

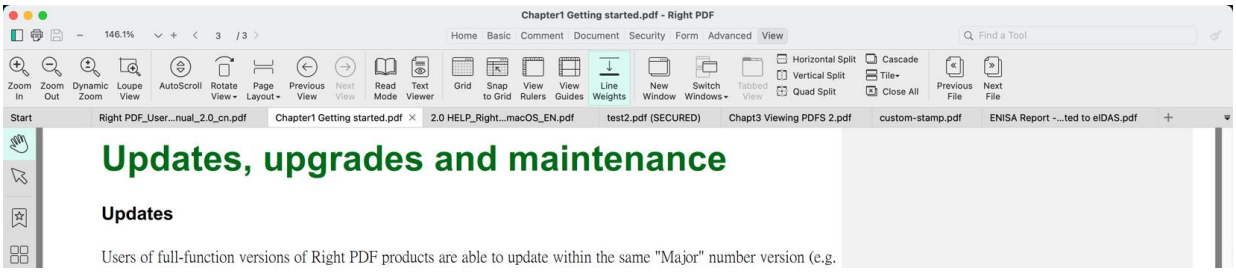


The basic reading controls on the page navigation toolbar:
***A.** To Previous Page **B.** To Next Page **C.** Single page **D.** Continuous Page **E.** Exit Full Screen Mode*

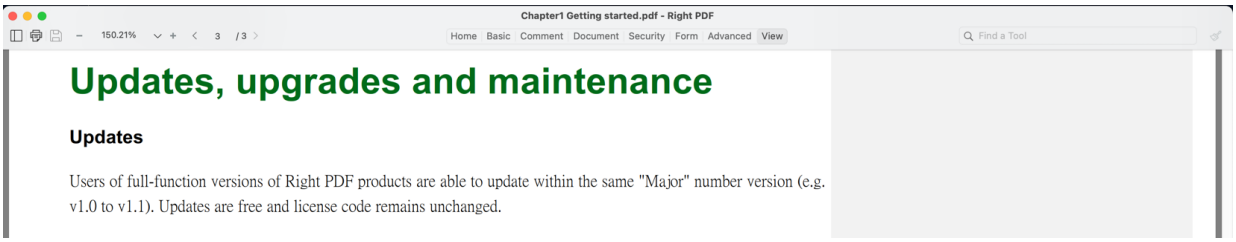
Read in Read mode

Read mode hides many interface elements including Sidebar Navigation Pane, Ribbon tabs, and File Tabs in exchange of maximum document display area. Select **View > Read Mode** .

To exit the Read Mode, press Esc.



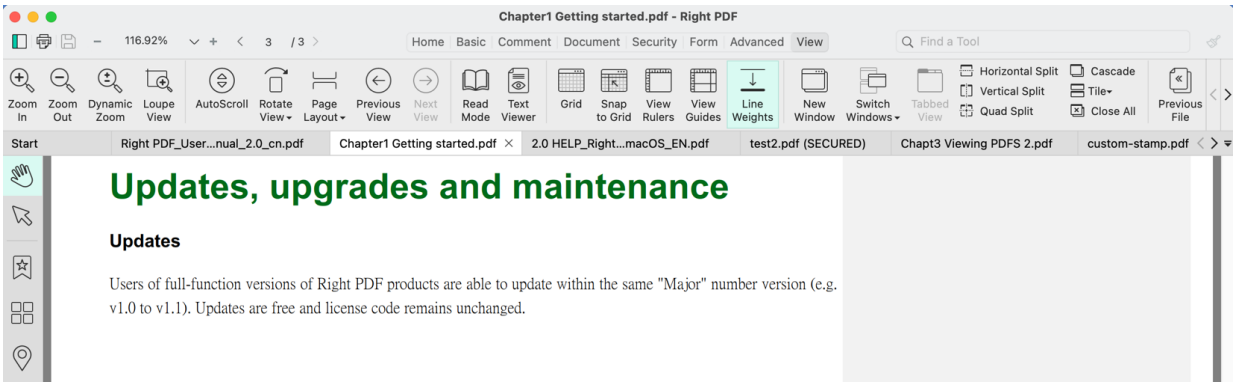
Read mode off



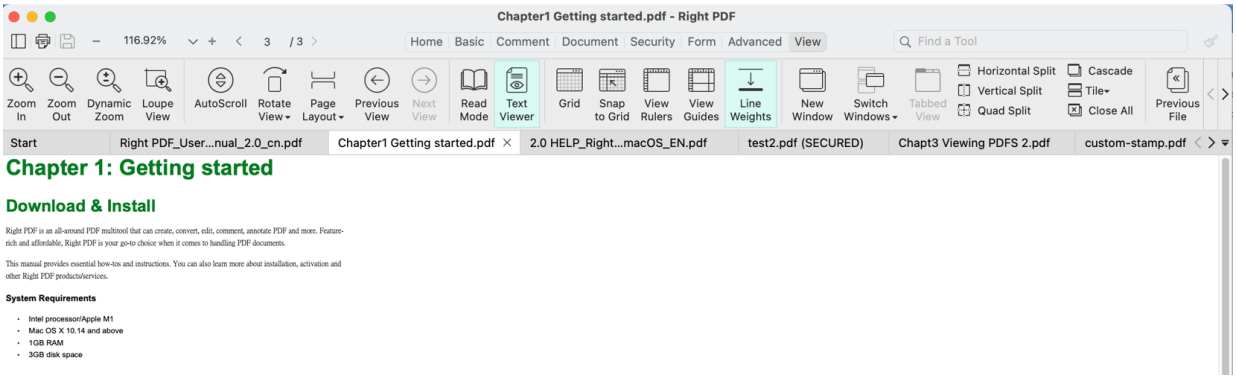
Read mode on

Read in Text Viewer mode

In Text Viewer mode, all images are hidden so that users can read and scan text with ease.



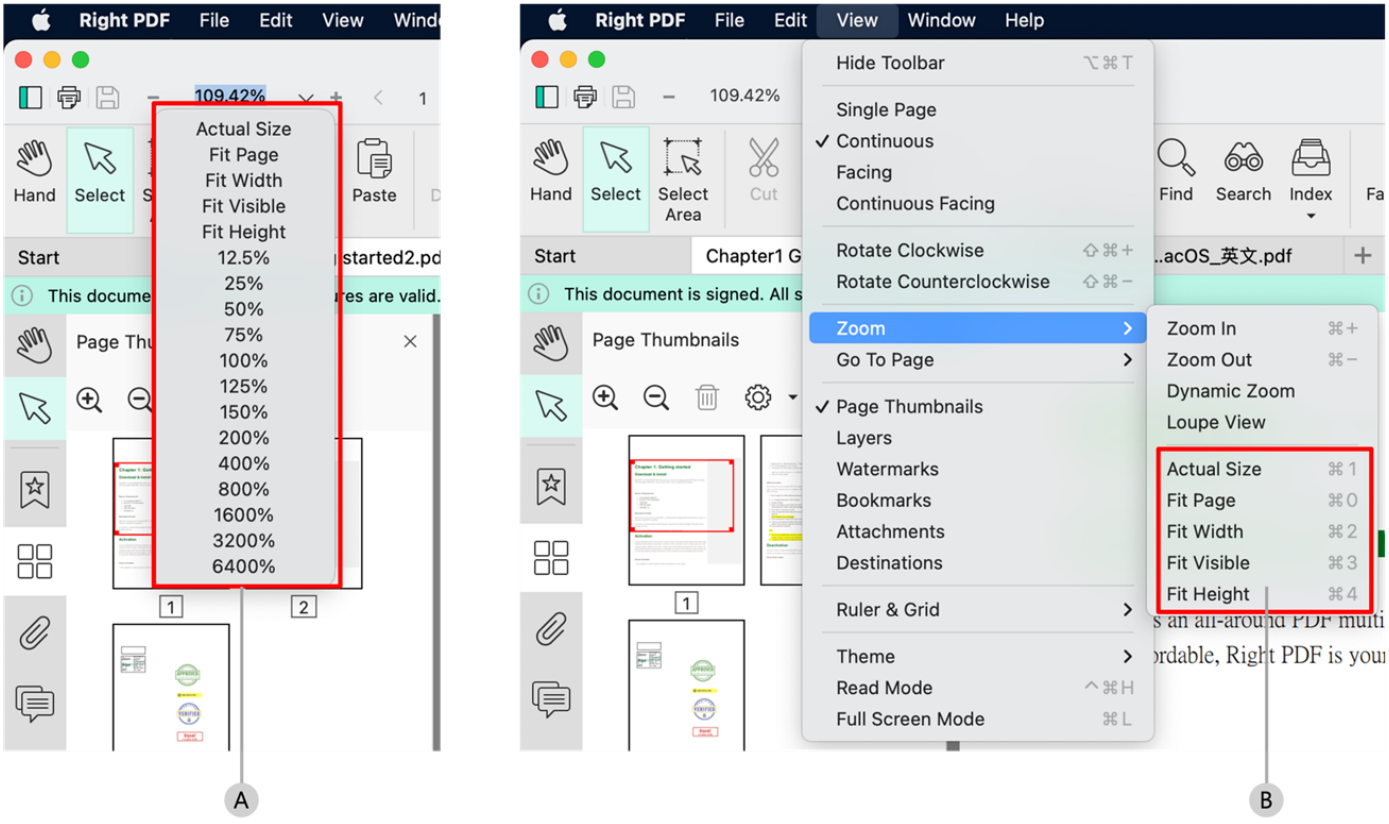
Text viewer off



Text viewer on. Text only reading

Resize page view

You can resize page view by using the value menu button (A) to the left of ribbon, or click View > Resize (B) in Menu Bar to do the same.



- **Actual Size**: view the document in its normal size.
- **Fit Page**: make the width and height of the document exactly fit within the Document pane.
- **Fit Width:** make the width of the document fit within the width of the Document pane.
- **Fit Visible**: to view a document without any portion of page margin in the screen, select it to make the width of the document fit within the width of the Document pane.
- **Fit Height:** make the height of the document fit within the height of the Document pane.

Rotate page view

To view a PDF document in a desired orientation, use view rotation features to view it properly. You can rotate the view clockwise and counterclockwise in Right PDF. View Rotation features on the Page Viewing controls bar: A. Rotate View Clockwise B. Rotate View Counterclockwise

- **Rotate View Clockwise**: click to temporarily rotate the view of all pages by 90 degrees clockwise. The original page orientation is restored the next time you open the PDF.
- **Rotate View Counterclockwise:** click to temporarily rotate the view of all pages by 90 degrees counterclockwise. The original page orientation is restored the next time you open the PDF.

  Note: Rotate View changes the way that a PDF file is displayed in the Document pane. It temporarily changes the view for viewing purposes only, but no changes to page orientation are saved to the PDF file. Rotate Pages, however, permanently rotates the pages within the PDF file.

Choose any way to rotate page view:

- Choose View tab > Rotate View Clockwise or Rotate View Counterclockwise.
- In Menu Bar, click “View” > “Rotate View Clockwise” or “Rotate View Counterclockwise”.
- Press Shift + Command + = or Shift + Command + - on the keyboard.

Adjust page zoom level

You can use Zoom tools or the Zoom level controls on the top of window to view a page or an image with different magnification.

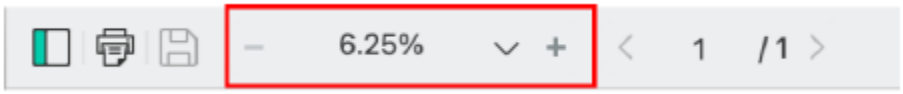
Use the Zoom tools

Go to the View tab and select Zoom tools to zoom in, zoom out, or just view a particular area at high magnification.

- **Zoom in/out.** Select Zoom in/out to change the document magnification by preset levels. You can click or drag a rectangle on the page.
- **Dynamic Zoom.** Click Dynamic Zoom and a magnifying glass will appear. Drag up/down a page with the magnifying glass to smoothly zoom in/out pages without sudden transitions. Or, roll up/down a mouse wheel to zoom in/out pages in preset levels.
- **Loupe View.** Click Loupe View and click again anywhere on the page to call out the magnifying window. You can drag the loupe rectangle around to change its loupe view. Changing the color for the loupe rectangle is also available in the Loupe View Tool window.
    1. Choose View > Loupe View.
    2. Click an area where you want to view in closer detail. A rectangle appears in the document, corresponding to the area shown in the Loupe View Tool window. You can also drag the rectangle to change the view.
    3. (Optional) To change the zoom level of the Loupe tool, you can do any of the following:
        - Drag the slider.
        - Click the plus or minus buttons.
        - Enter a zoom value in the zoom value text box.

Adjust Zoom level with the Zoom level controls

Adjust Zoom level with the Zoom level controls:



- **Zoom in/out button:** click the Plus (+) or Minus (-) button to change zoom level.

- **Zoom value text box:** enter any number between 6.25 and 6400 into the percentage field and press Enter.
- **Zoom value menu button:** click the arrow right next to the zoom text box and select a preset percentage, ranging between 12.5% and 6400%.

Use split-window view

Using the Split commands, you can view a document with the document pane divided into two panes (Horizontal Split and Vertical Split) or four panes (Quad Split). While viewing a document with split windows, you can scroll though pages, adjust zoom level, or jump to a specific page in one of the panes independently.

Create a type of split view

1. Open a PDF file and go to the View tab.
2. Select a Split command as needed:
    - Select Horizontal Split to horizontally split the view into two. Alternatively, drag the small, grey rectangle box just over the top of the vertical scroll bar down.
    - Select Vertical Split to vertically split the view into two.
    - Select “Quad Split” to evenly split the view into four.
3. Click and drag the splitter bars up, down, left, or right to adjust the size of the panes.

To adjust zoom level of each pane

- In Horizontal Split view, click a pane to make it active and change zoom level for the active pane only.
- In Vertical Split view, change zoom level for the active pane.
- In Quad Split view, change zoom level for the active pane only.

To scroll a document

- In Horizontal Split view, click a pane to make it active and then scroll the document in the active pane only.
- In Vertical Split view, scroll the document in the active pane.
- In Quad Split view, scroll vertically to change the view in the active pane and the pane above or below it. Scroll horizontally to change the view in the active pane and the pane beside it, and the view of all 4 panes will always remain on the same page.

View and snap to grid

You can use grids to line up text and objects in a document. The grid becomes visible once it is turned on. The Snap to Grid option helps you align an object (can be selected text or images) to the nearest grid while moving the object.

View grids

1. Open a PDF file and choose View > Grid.
2. To hide the grid, deselect Grid to turn it off.

Snap to grids

1. (Optional) To better align objects, turn on Grid in advance.
2. Choose View > Snap to Grid.
3. Move an object and it will automatically align with the nearest grids.

Change the grid appearance

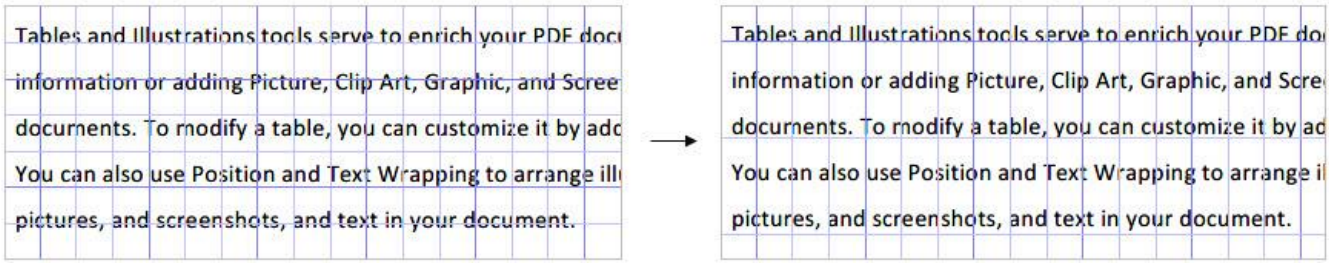
You can change grid settings in the Preferences dialog box, such as page units, grid line color, and more.

1. Do any of the following to open the Preferences dialog box:

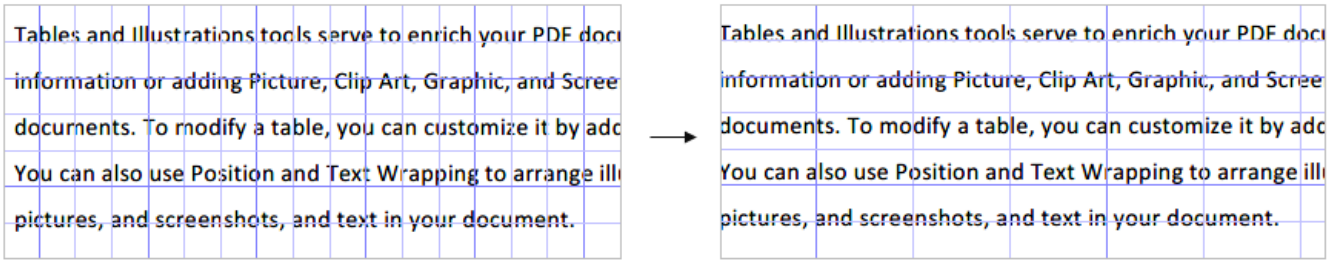
    - Choose Right PDF > Preferences….
    - Press Command + K on your keyboard.
    - Click the Document Properties/Preference shortcuts button located at the top-right corner of the document pane, and click Preferences.

2. In the Preferences dialog box, choose General > Units & Grids and follow the on-screen instructions to change grid settings:

    - **Width between lines/Height between lines.** Both define the spacing between grids.
    - **Grid offset from left edge/Grid offset from top edge**. Both define the origin of the grid.
    - **Sub-divisions**. Enter a value for Subdivisions to edit the number of subdivisions within each grid square. Subdivision lines are lighter than grid lines.
    - **Grid line color/Grid line minor color.** Choose a new color for the grid lines from the color palette.



Height between grids increased



Width between grids increased

Note: after Snap to Grid is activated, objects will be aligning with the "grids" even if Grid is not turned on. Please remember to disable Snap to Grid to make sure objects are placed as intended.

Create ruler guides

The horizontal and vertical rulers let you check the size (length and width) of an object. Once turned on, the rulers will be displayed on the top and to the left of the Document Pane. For aligning objects, you can also create guides in your document.

View rulers

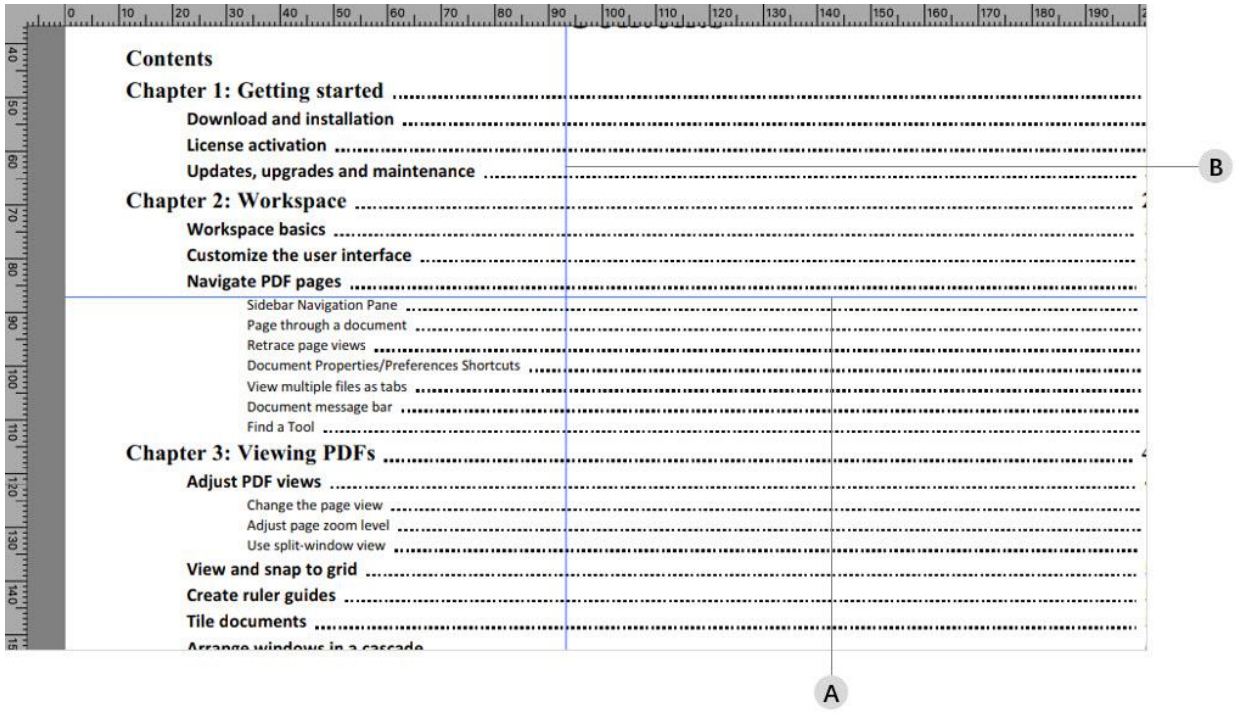
1. Choose View > View Rulers.
2. To hide the rulers, deselect View Rulers to turn it off.

Create new ruler guides

1. Choose View > View Rulers.
2. Do either of the following to create new ruler guides:

   - Click on the horizontal ruler and drag it down to create a horizontal guide, or click on the vertical ruler and drag it from left to right of to create a vertical guide.
   - Double-click a location on the horizontal ruler to create a vertical guide, or double-click a location on the vertical ruler to create a horizontal guide.

3. To hide guides, deselect View > View Guides.



A. Horizontal ruler guides and B. Vertical ruler guides appear on a page where View Guides is on.

Change guide colors

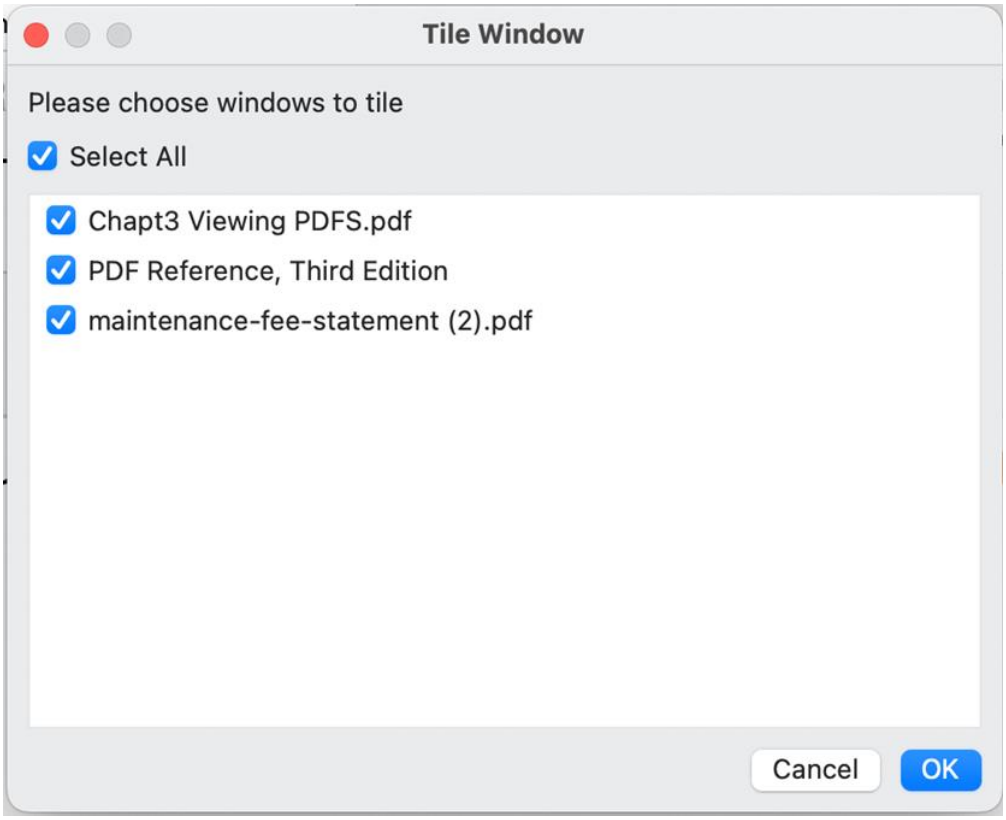
You can change guide colors in the Preferences dialog box.

1. Do any of the following to open the Preferences dialog box:
    - On Menu Bar, Choose Right PDF > Preferences.
    - Press Command + K on your keyboard.
2. In the Preferences dialog box, choose General > Units & Grids.
3. Click the Guide Color square and choose a predefined color from the color palette or define a custom color.

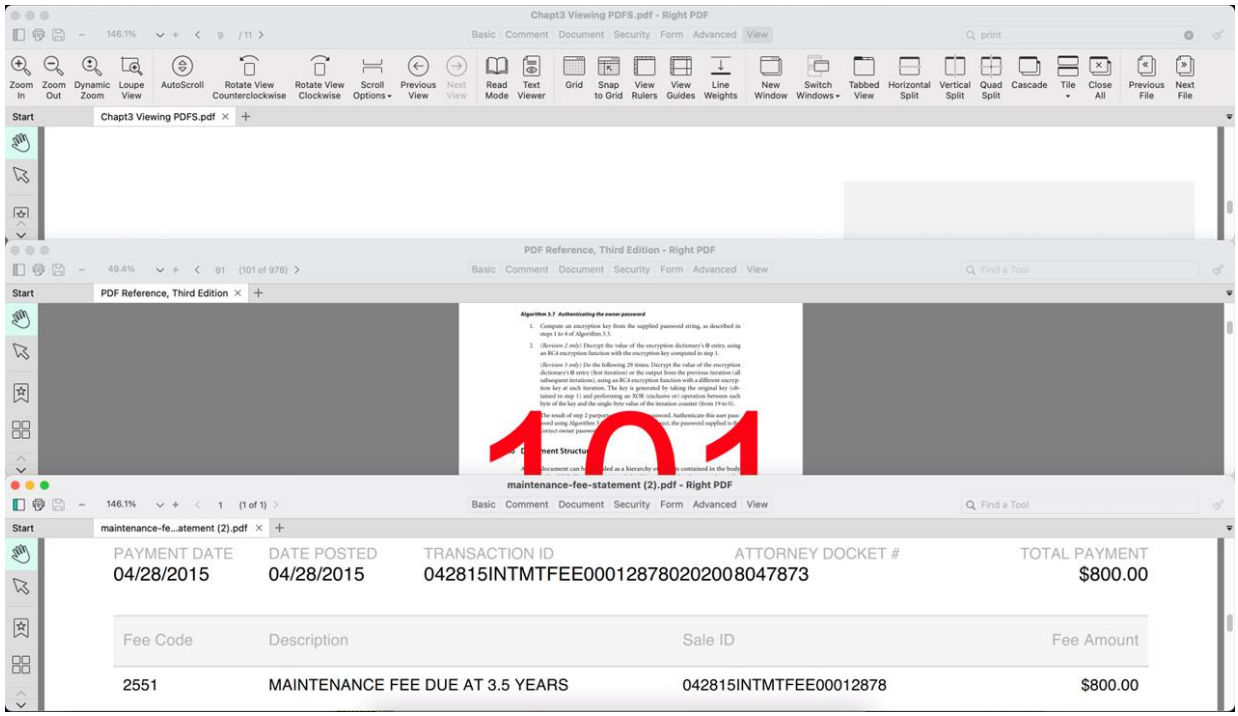
Tile documents

You can navigate across multiple currently open PDF documents simultaneously within Right PDF using the Tile command. Choose either horizontally or vertically tiled windows for optimal viewability.

1. Open multiple PDF documents and choose **View >Tile**  .
2. Select either **Horizontally** or **Vertically** from the menu.
3. In the **Tile Window** dialog box, choose the files to be tiled horizontally or vertically and then click **OK**.
4. The tiled windows appear on your screen.



Select the windows to tile



Windows tiled horizontally

Arrange windows in a cascade

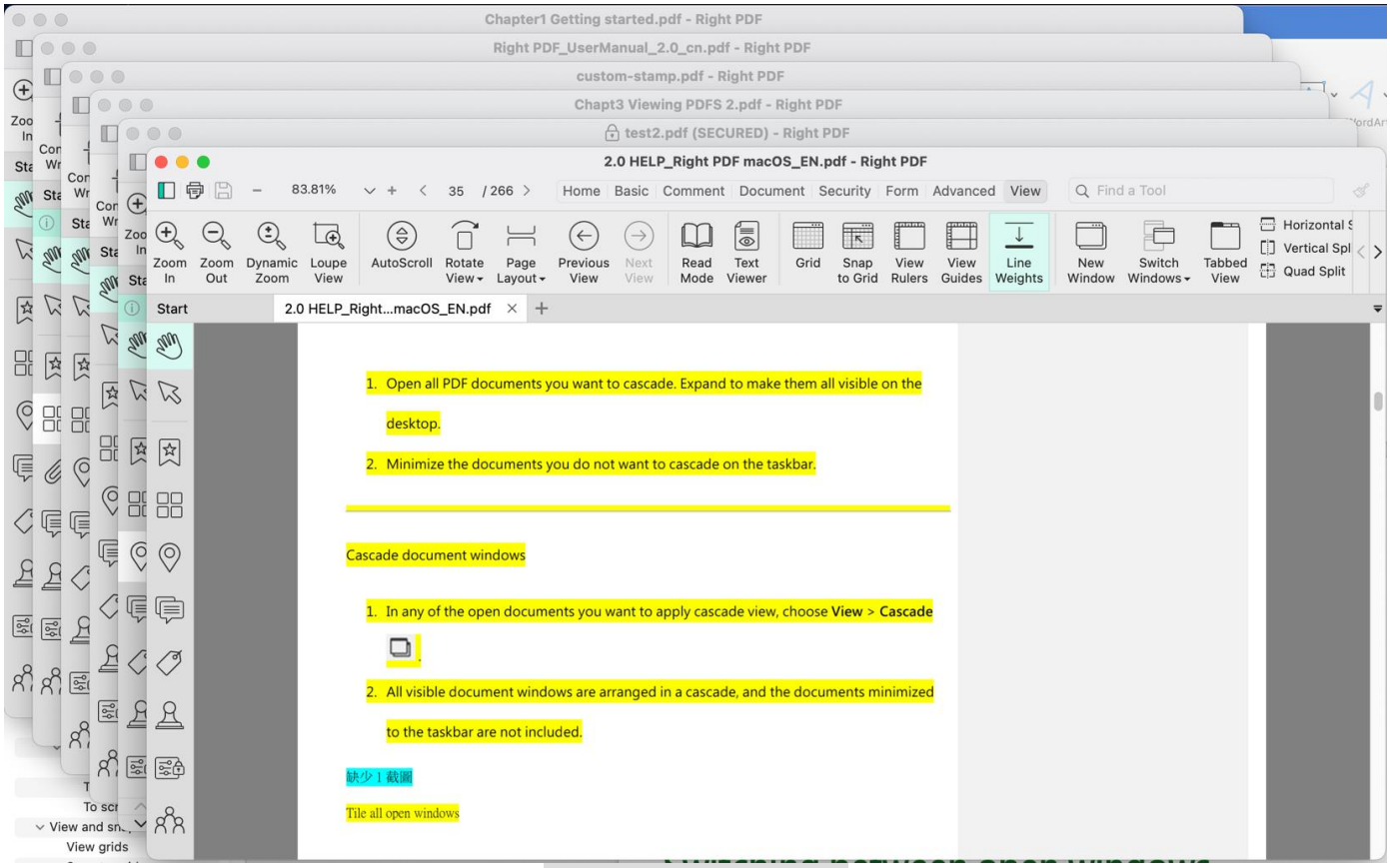
You can use Cascade to arrange all open documents in a cascade view, except the documents minimized on the taskbar. Make sure all documents you want to cascade are visible on the desktop before applying Cascade and leave those you don’t want to cascade minimized on the taskbar.

Before cascading

1. Open all PDF documents you want to cascade. Expand to make them all visible on the desktop.
2. Minimize the documents you do not want to cascade on the taskbar.

Cascade document windows

1. In any of the open documents you want to apply cascade view, choose **View > Cascade**  .
2. All visible document windows are arranged in a cascade, and the documents minimized to the taskbar are not included.



Tile all open windows

Switching between open windows

Using Switch Windows, you can switch between documents you have already opened. It is especially useful if you have opened a large number of PDF documents and want to quickly switch between them.

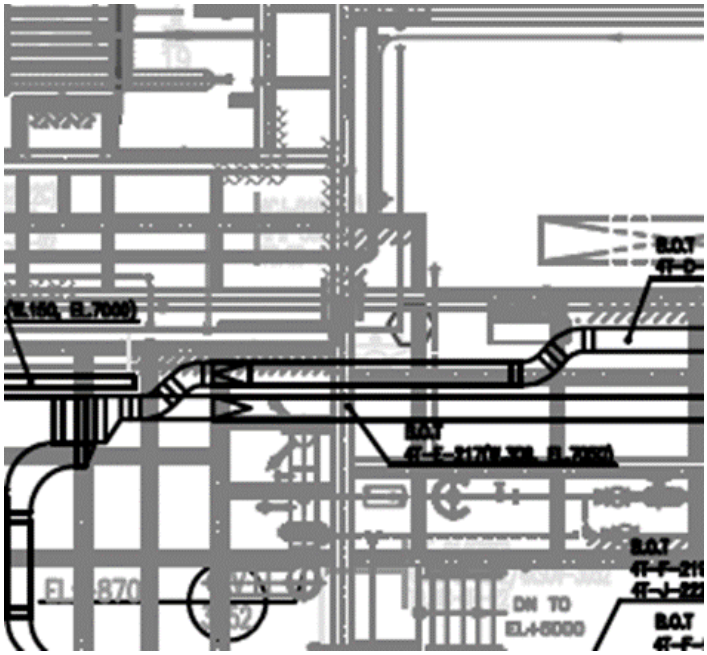
- Open multiple files and choose View > Switch Windows. Click the down-pointing arrow next to Switch Windows and select the document you want to view from the menu.
- On Menu Bar, click Window and choose a file from the bottom file list to switch.

Display PDFs in the line weights view

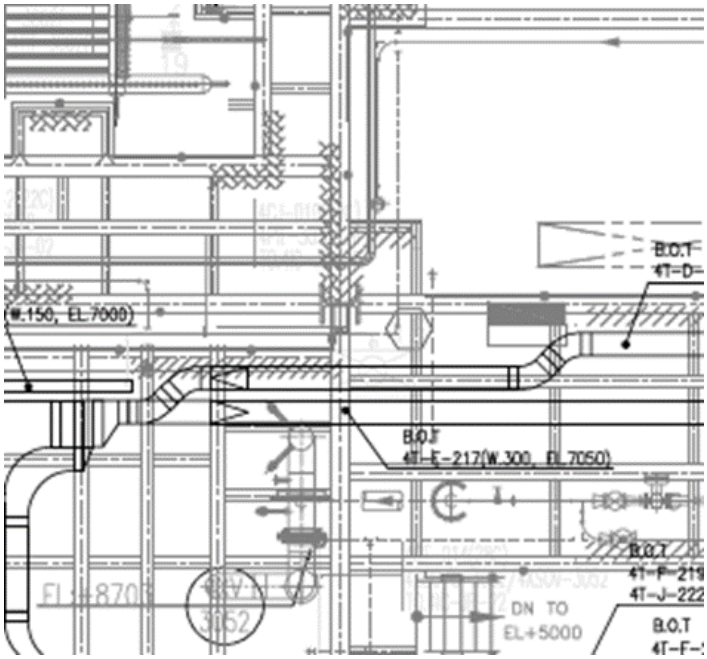
Line Weights view displays lines with the weights defined in the PDF. When Line Weights is off, it applies a constant stroke width (1 pixel) to lines, which remain unchanged during zooming. When you print the document, however, the stroke prints at the true width.

View a document with the Line Weights view on

1. Select View > Line Weights to turn it on.
2. To turn off the Line Weights view, deselect View > Line Weights.



Line Weights on turning lines into a constant stroke width 1 pixel



Line Weights off

View a document in multiple windows

You can create multiple windows for the same document using the New Window feature. The current document is then copied to a new window that retains the same page layout and magnification level.

When you create a new window, the file name of the original window is given a suffix":1" and the new window suffix":2". If you close one window, the remaining windows are renumbered sequentially. For example, as demonstrated below, there are four windows from the same document. If you close the second window “Untitled 1: 2,” the remaining three windows are automatically renumbered in order. You can close multiple windows without affecting the original window as long as there is more than one window open.

To open a new window

1. Open a PDF file and choose **View > New Window**.
2. A new window displaying the same page pops up on top of the original window, with the suffix:2 added to its file name. Repeat clicking New Window to create more windows for the document.
3. You can click the close box to close the window. As long as one window remains open, you can close any number of windows.

Merge multiple windows into one

If you are viewing PDFs in multiple windows, you can use this feature to merge all windows as tabs in one window.

1. While viewing PDFs in multiple windows, choose **View > Tabbed View**  .
2. All windows are merged into one window as tabs.

AutoScroll

Scroll through PDF documents at an even pace without keystrokes or mouse actions. If you move the scroll bar to another page or location, auto scrolling will start from there. It stops at the end of the PDF.

Open a PDF and choose **View > AutoScroll** to start.

1. **Change direction:** press “-“ key to change direction
2. **Adjust speed**: press up or down arrow key to adjust speed, or press number keys to adjust speed (on a 0-9 scale).
3. **Pause**: press and hold Space, or click and hold the mouse button to pause.
4. **Jump to previous or next page**: press left or right arrow key to jump to the previous or next page.
5. **Stop AutoScroll**: press Esc or deselect View > AutoScroll to stop.

Compare documents

You can use Compare Documents to identify any text and visual differences between two versions of the same document (Initial document and Changed document) by running page by page comparison. This feature spots the differences for you and generates a detailed comparison report of every change, including text, fonts, and annotations.

To compare two versions of a PDF file

1. Open a PDF document and choose **Advanced > Compare** .
2. In the **Compare Documents** dialog box, choose the documents to compare.
3. Under **Comparison Type**, select the type that suits your needs:
    - Select **View visual and text differences** to identify differences in image and text. Click **Marking color** to specify a preset color or define a custom color.
    - Select **View text differences to ignore differences** in images. Select **Include font information** to identify the difference in font styles.
4. Under **Compare Range**, set the comparison range by entering the page numbers in **Older** (Initial document) and **Newer** (Changed document). You may also adjust the slider to preview the pages.
5. Under **Type of comparison report**, select a report type for the comparison report:
    - **Side by Side.** The comparison report is shown on the first page, with the differences highlighted and marked on both files.
    - **Combined**. Differences are marked on the Changed document (used to display results) with a summary of differences attached to the top of the first page.

Files placed side-by-side.

The first page of the document summarizes the comparison results, which include **A.** Files compared **B.** Summary of differences – pages which were added, deleted, matched, and replaced **C.** The legends used in the report**.** The files compared are placed side by side in the comparison report with differences marked on both files.

Text Comparison

Initial Document:
Chapter1 Getting started

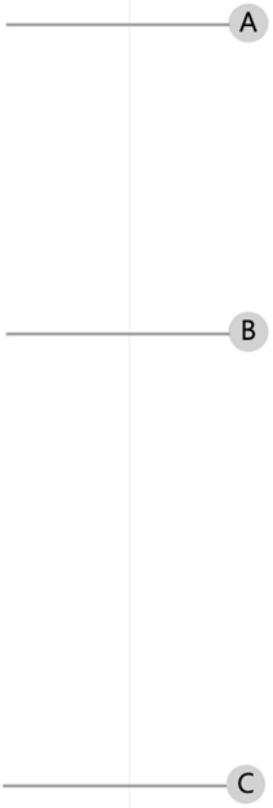
Changed Document:
Chapter1 Getting started2

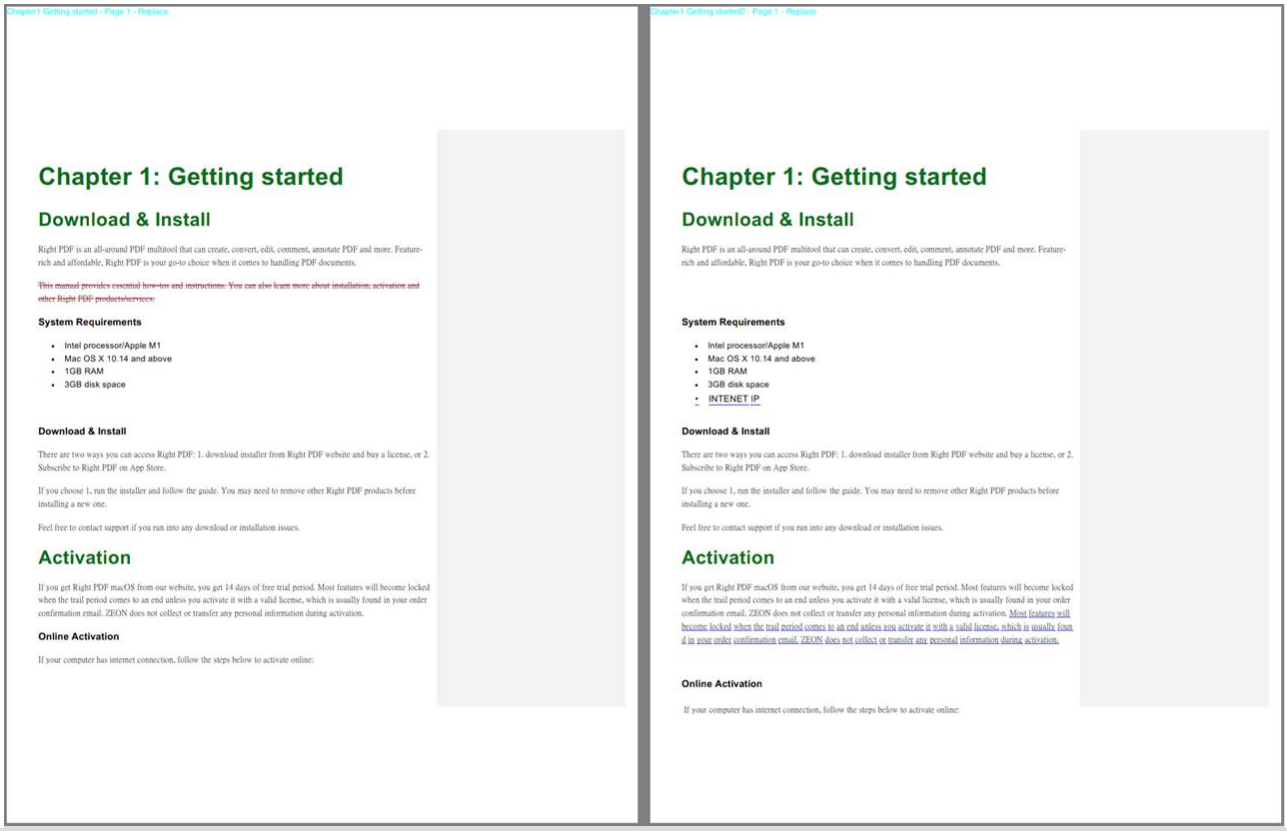
Summary:
Differences exist between the documents.

45 word(s) added
259 word(s) deleted
537 word(s) matched

1 page(s) deleted
2 page(s) replaced

Insert) inserted	Word(s) inserted
~~Delete) deletedd~~	Word(s) deletedd
Move(s) movededd	Word(s) movededd
Differentifferent only in style	Word(s) different only in style

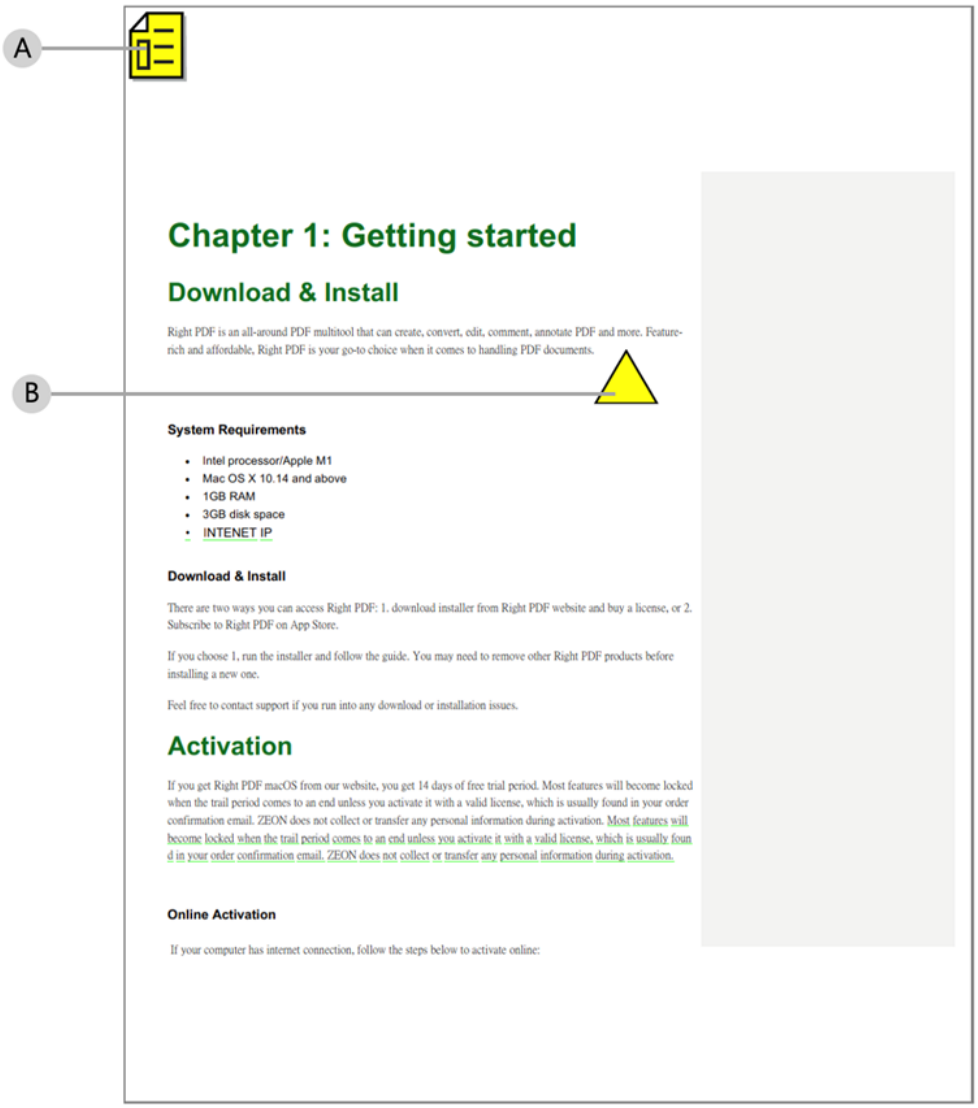




The comparison results will show in two documents placed side-by-side, with differences marked.

Integrated files.

A. The note in the top-left corner summarizes the differences between the files compared. **B.** Differences are highlighted and marked in the **Changed document.**



Reading PDFs

This function reads text within a document and allows those who have visually or mobility impairment to read and view files easily.

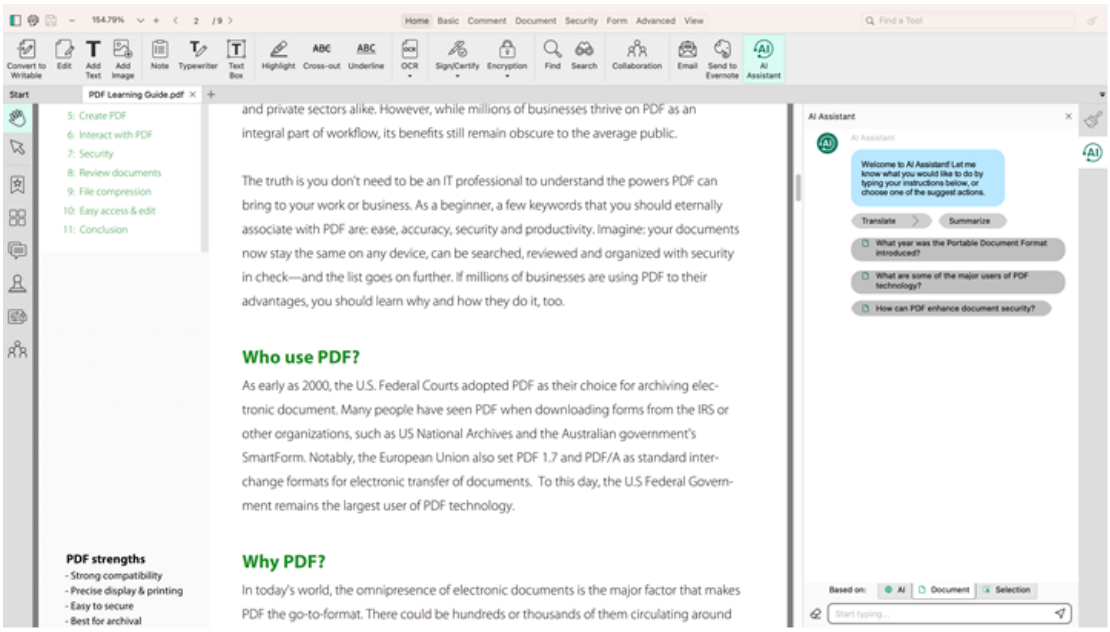
1. Open a PDF document and choose Basic tab.
2. In the Read Out Loud group, choose an appropriate option for reading:

    - **Read This Page**. It only reads the current page. Click to start reading, and click again to stop and start over from the beginning.
    - **Read To End**. It reads the entire document. Click again to stop reading.
    - **Pause**. This button is available only when the reading is in progress. When paused, the button changes to Resume.

- **Rate Up**. It increases the reading speed.
- **Rate down**. It decreases the reading speed.

AI Assistant

Right PDF AI Assistant offers LLM-based natural language question answering, and is capable of generating documents or text summaries, and translating documents or text to enhance the efficiency of reading PDF.



Prerequisites

You may choose either OpenAI or Azure OpenAI.

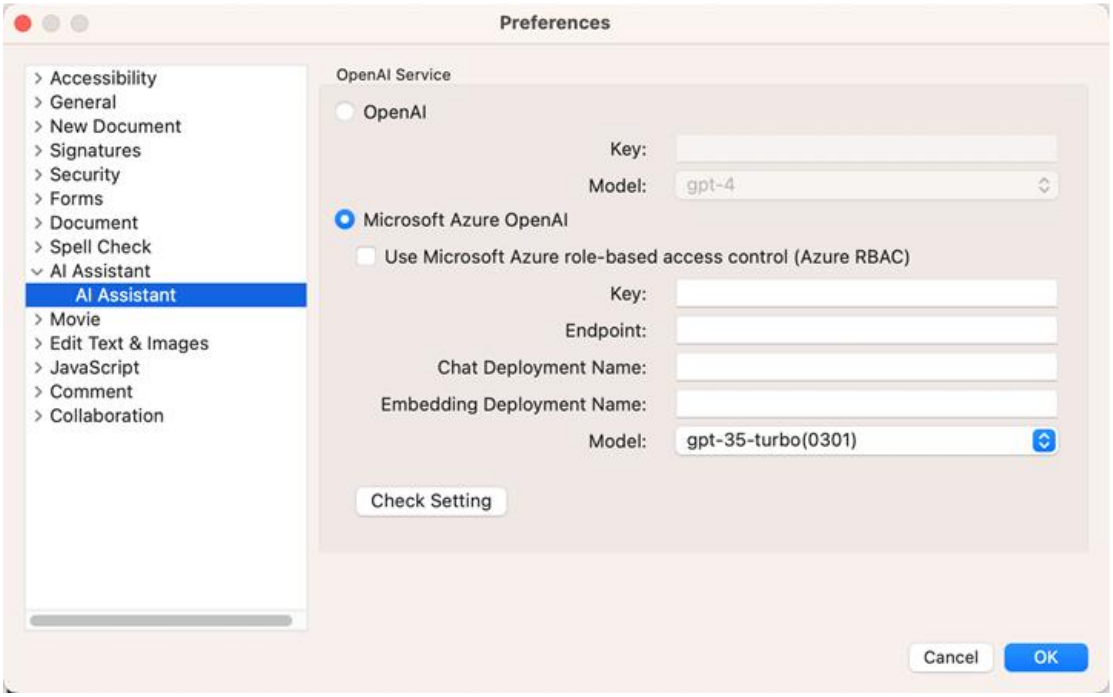
To choose OpenAI, you need to:

- Sign in to OpenAI Platform with an OpenAI account;
- Navigate to **API Keys** (https://platform.openai.com/api-keys) page and **Create new secret key**;
  * **Please note**: This service requires an active balance in your OpenAI account (see **Billing > Overview**). For more details on available plans, please visit the OpenAI website.
- Enter the OpenAI API key in **Preferences > AI Assistant**.

To choose Azure OpenAI, you need to:

- Have a valid Azure subscription and grant access to Azure OpenAI in Azure Portal.
- Create and deploy chat completion model and text embedding model in Azure Portal.
- Enter the information required to use the Azure OpenAI API in **Preferences > AI Assistant**.

Setting Up AI Assistant in Preferences



1. Open Right PDF MacOS and do any of the following to open the Preferences dialog box:

   - Click **File > Preferences**.
   - Press **Ctrl+K** on your keyboard.

2. Select **AI Assistant** on the left side of the **Preferences** dialog box. Then select your OpenAI service on the right side and fill in the credentials.

   OpenAI

   - **Key**: Enter your OpenAI API key.

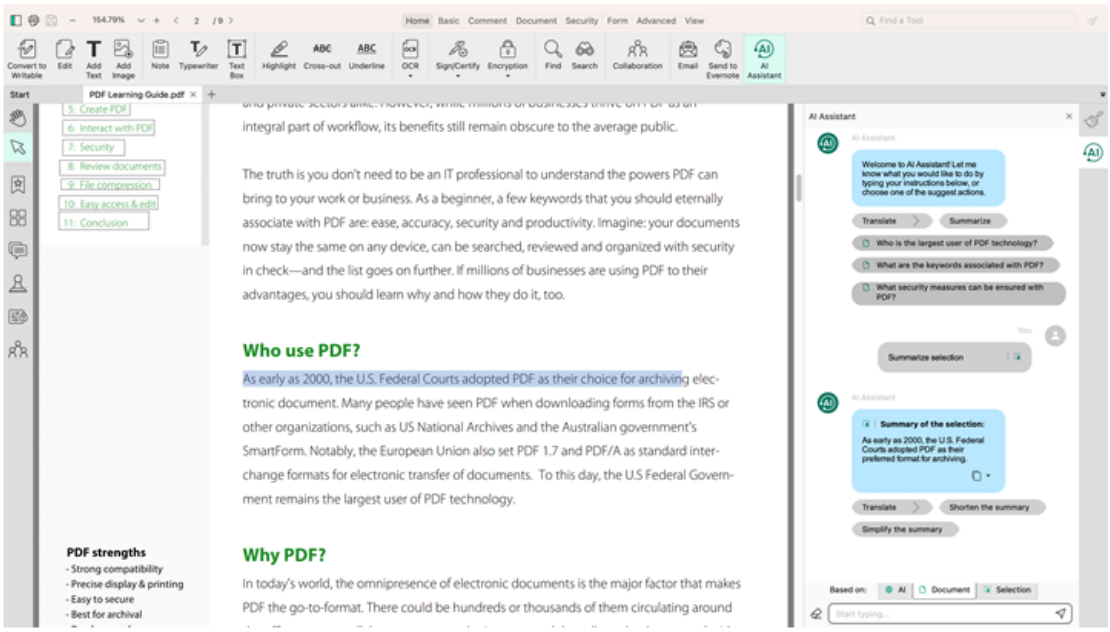
- **Model**: Select a model.

Microsoft Azure OpenAI

- **Use Microsoft Azure role-based access control (Azure RBAC)**: Once checked, your identity will be verified by signing in to your Azure account.
- **Key**: Enter Azure OpenAI API key. You can find it in **Keys and Endpoint**, under Resource Management in Azure Portal.
- **Endpoint**: Enter endpoint. You can find it in **Keys and Endpoint**, under Resource Management in Azure Portal.
- **Chat Deployment Name**: Give the chat completion deployment a name.
- **Embedding Deployment Name**: Give the text embedding deployment a name.
- **Model**: Select the version of the model.

3. Click **Check Setting** to check if the AI â€‹â€‹Assistant is set up correctly.
4. Click **OK** to close the **Preferences** dialog box.

Access AI assistant features



1. Launch Right PDF MacOS and open a file.
2. Do any of the following to open the AI â€‹â€‹Assistant panel:

- Click **Home > AI Assistant**.
- Select text with **Select** Choose **Summarize the selection** and other AI tools from the right-click menu.

3. The AI â€‹â€‹Assistant panel will appear on the right side of the Right PDF MacOS. If this is your first time launching the AI â€‹â€‹Assistant or the PDF was modified, AI â€‹â€‹Assistant will analyze the current document automatically and provide content-based suggestions.
4. The AI â€‹â€‹Assistant offers preset commands such as **Summarize**, **Translate**, etc. for you to choose from.
5. You can also do any of the following:

    - **Copy**: Click to paste the answer to clipboard.
    - **Copy to note**: Click to add a note that contains the answer.
    - **Clear History**: Click to delete history.
    - **Re-analyze**: Click to re-analyze the document.

6. Close the AI â€‹â€‹Assistant panel: Click the **X** (Close) button in the upper right corner of the AI â€‹â€‹Assistant panel.

Use the AI Assistant

1. Do any of the following to open the **AI â€‹â€‹Assistant**

    - Click **Home > AI Assistant**.
    - Select text with **Select** Choose **Chat about the selection** from the right-click menu.

2. Click to switch modes as needed:

    - Based on **AI**: AI Assistant generates answers based on large language models(LLC).
    - Based on **Document**: AI â€‹â€‹assistant generates answers based on the content of current document. This mode also supports content tracking. Click the link in the answer to view the source in the original content.
    - Based on **Selection**: Select text with Select tool in advance, and AI â€‹â€‹Assistant will generate answers based on the selected text.

3. Click the text box at the bottom to enter a question or prompt, and click **Send Question**. You can also take the suggestions provided by AI â€‹â€‹Assistant.
4. Answers will be displayed in the **AI â€‹â€‹Assistant** You can click **Copy** to copy the â€‹â€‹ answers to clipboard, or click **More...** - **Copy to note** to create a note that contains the answers.

Summarize the document/the selected text

Right PDF AI Assistant can generate a summary of an entire document or selected text.

Summarize a document

1. Click **Home** > **AI Assistant** to open the **AI â€‹â€‹Assistant**
2. Click the **Summarize** You can also enter "**Summarize full text**" in the text box and send it.
3. **AI â€‹â€‹Assistant** panel will show the summary of the current document. You can click **Copy** to copy the summary to clipboard, or click **..** - **Copy to note** to create a note that contains the summary.

Summarize selected text

1. Drag-select text with **Select** tool, and then do any of the following:

    - Choose **Summarize the selection** from the right-click menu.
    - In **AI â€‹â€‹Assistant** panel, switch to "based on **Selection**," and then click the **Summarize the selection** below the answer.

2. **AI â€‹â€‹Assistant** panel will show a summary. You can click **Copy** to copy the summary to clipboard, or click **..** - **Copy to note** to create a note that contains the summary.

Translate the document/the selected text

Right PDF AI Assistant can translate an entire document or selected text to another language.

Translate a document

1. Click **Home > AI Assistant** to open the **AI â€‹â€‹Assistant**
2. Click the drop-down button next to **Translate**, select a language, and then click **Translate**. You can also enter "**Translate full text to English**" in the text box and send it.
3. **AI â€‹â€‹Assistant** panel will show the translation. You can click **Copy** to copy the translation to clipboard, or click **..** - **Copy to note** to create a note that contains the translation. If the translation is too lengthy for a single note, multiple notes will be created.

Translate selected text

1. Drag-select text with **Select** tool, and then do any of the following:

    - Choose **Translate the selection** from the right-click menu.
    - In the **AI â€‹â€‹Assistant** panel, switch to "based on **Selection**," and then click the **Translate the selection** below the answer.

2. **AI â€‹â€‹Assistant** panel will show the translation. You can click **Copy** to copy the translation to clipboard, or click **..** - **Copy to note** to create a note that contains the translation. If the translation is too lengthy for a single note, multiple notes will be created.

Chapter 4: Creating PDFs

Creating PDFs within Right PDF

Create a blank PDF

With Right PDF, you can create a blank PDF in Write mode which offer a Word-like editing experience. Tools like font, line spacing, paragraph spacing, insert table and page orientation, etc. Write mode and Review mode offer somewhat different set of editing tools and you are free to switch between modes to suit your needs.

Create a blank PDF

1. Launch Right PDF and do any of the following to create a blank PDF:
    - On Menu Bar, choose **File > New > Blank File**.
    - Start > Recent > Quick Launch > Create
    - Click the “+” icon on the Document tabs
2. Choose **File > Save or File > Save as**, and then give it a name and specify a location to save.

Switch between Write mode and Review mode

- Select **Home > Switch to Review Mode** , or **Switch to Write Mode** , depending on which mode you are using.

Create a PDF from scanner

Right PDF lets you create a PDF file directly from a paper document with ease. In scan settings, you can choose to scan to a new document, to an existing file or portfolio, or run OCR to make text searchable and compliant with PDF/A-1b.

- On Menu Bar, choose File > New > From Scanner and select Quick Scan.
- In the Scan Settings dialog box, select a scanner from the Scanner drop-down menu. In the Output section, if you are going to create multiple files, check **Multiple files** and click More Options… to determine the number of pages of each file, the prefix of file name, and whether to create portfolio; to append the scanned content to an existing file or portfolio, select Append to existing file or portfolio.
- In the Document Settings section, you can select **Reduce File Size** and set a compression ratio using the slider bar. In PDF type, choose one from the following:
    - Image-only
    - Searchable
    - Searchable and editable
    - MRC PDF Document
    - Searchable MRC
- Alternatively, choose a PDF subset from the Compatibility menu. If you select **Searchable**, **Searchable and editable** or **Searchable MRC**, Right PDF will run OCR automatically. For optimal result, please select languages appropriate to the document content and pay attention to the following restrictions:
    - Select either only one Asian language, or one or more languages using the Latin or Cyrillic alphabet.
    - Asian cannot be mixed with other languages.

    Note: If your document exceeds these restrictions, select **Automatic language detection**.

- Click **Scan**.

OCR

You can run OCR to make your scanned documents searchable and editable in order to comment or mark up with reviewing and commenting tools.

Note: OCR cannot be performed on pages with renderable text (computer generated text placed on top of an image layer).

Run OCR on the current document

1. Open a PDF document you want to run OCR on in Right PDF.
2. Choose **Advanced > OCR**  and select Current File from the options.
3. In the **OCR Text Recognition** dialog box, adjust the settings as desired:
    - **Page Range.** Choose to recognize all pages, the current page or selected pages.
    - **Auto orient pages.** Select to let Right PDF auto-adjust page orientation.
    - **PDF types**
        - **Searchable**: extract text from images so that text becomes searchable.
        - **Searchable and editable**: convert images containing text into searchable and editable text.
        - **MRC PDF Document**: compress images using MRC.
        - **Searchable MRC**: compress images using MRC and make text searchable.
    - **MRC compression**: set a compression ratio using the slider bar. The higher the ratio, the smaller the file and poorer the quality. MRC separates text elements from images/background, and applies optimized compression on each element.
    - **Languages to recognize**: select OCR language. For optimal result, please select languages appropriate to the document content and pay attention to the following restrictions:
        - Select either only one Asian language, or one or more languages using the Latin or Cyrillic alphabet.
        - Asian cannot be mixed with other languages.

          Note: If your document exceeds these restrictions, select **Automatic language detection**.
    - **Automatic language detection**: once selected, Right PDF will detect and apply languages appropriate to each page.
4. Click **OK**.

Run OCR on multiple documents

1. Choose **Advanced > OCR**  and select Multiple Files from the options.
2. In the **OCR Text Recognition** dialog box, browse and select the files to run OCR on, and then click **OK**:
    - **Add Files…**. Add one or multiple files to the list. Use **Command-click** to select multiple files.
    - **Add Folders…**. Select a folder and click OK to add all files within the selected folder to the file list.
    - **Remove**. Select a file or **Command-click** to select multiple files and click **Remove** to remove them from the file list.
    - **Include current open files**. Check to include all currently open PDF files to the file list.
3. Click Settings to show the dialog box in which you can adjust OCR settings. Click **OK**.
4. In the **Output Options** dialog box that follows, specify where to save and how to name the output PDF files and then click **OK**:
    - **Target Folder.** Choose whether to save output PDF files to their original folders or to another folder that you specify.
    - **File Naming.** Choose to save with the original file names or add prefix/suffix to the original file names. To insert additional characters to the original file names, check **Add to original file names** and type text in the **Insert Before** and **Insert After** boxes so that output files will be named in the form of [Text inserted + original file name + Text inserted .pdf]. If **Keep original file names** is selected, it is required to check **Overwrite existing files** to ensure output PDF files overwrite the originals.
5. Click **OK**.

Correct OCR suspects

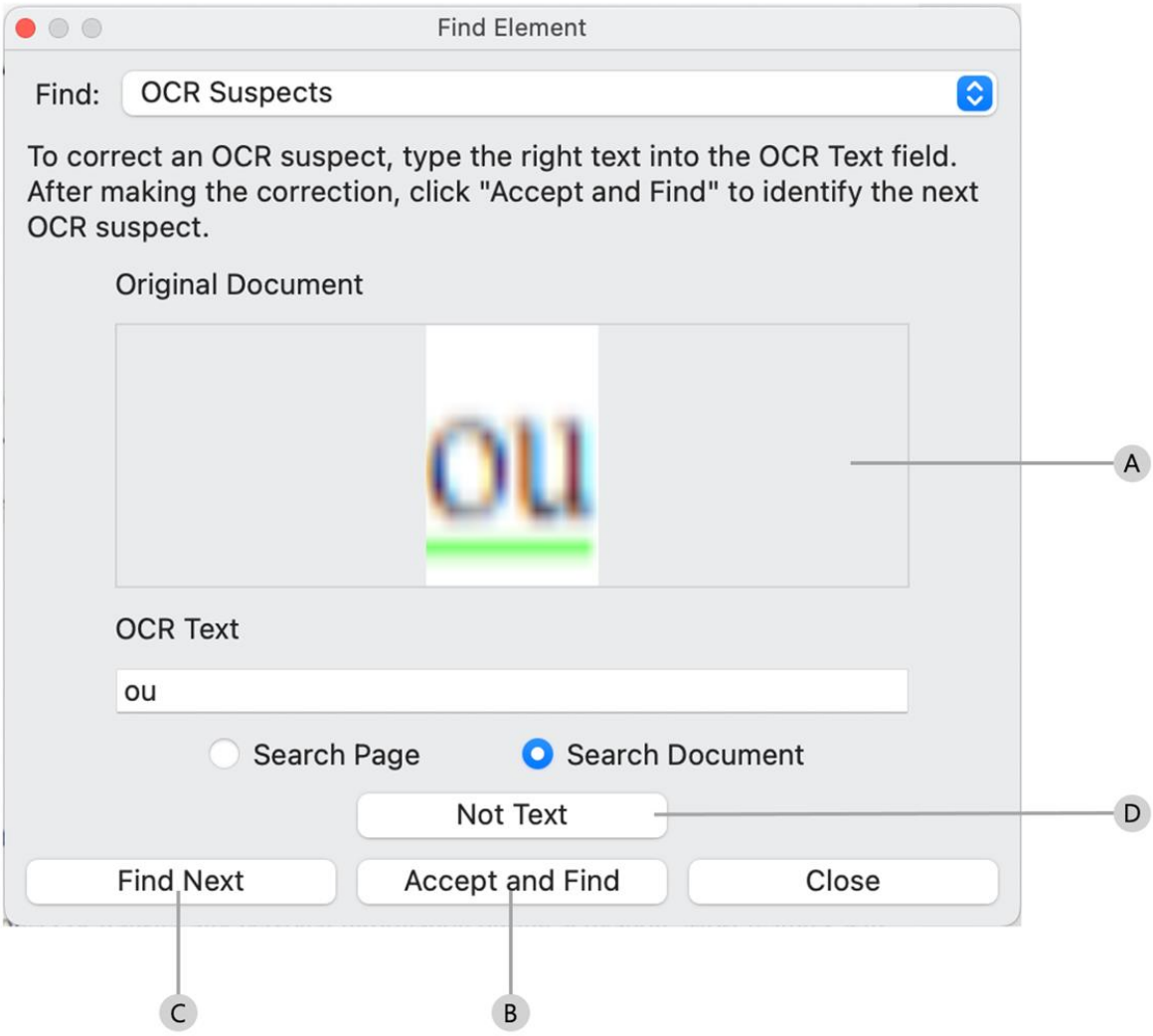
The Find Suspects feature finds potential recognition mistakes and offers you options to correct the text. You can use it after the text of scanned documents has been made searchable. Thus, the clearer the original scanned documents are, the fewer suspects this feature will find.

Note: this feature works only when the text in scanned document is searchable. Making text searchable won't affect the appearance of the original scan file.

Find and replace OCR suspects

1. Open a scanned PDF document to run OCR on. Make sure you make a copy of it and work on the copy only. See Run OCR on the current document for details.
2. Choose **Advanced > OCR**  and select one of the following:
    - **First OCR Suspect.** It identifies the first suspect character for you to confirm. In the **Find Element** dialog box, click the **Find** button to highlight the first suspect.
    - **All OCR Suspects.** It highlights all suspect characters. You can double-click a suspect and correct it in the **Find Element** dialog box that appears.
3. In the **Find Element** dialog box, click **Find** to highlight suspects. Suspects will be marked on the pages and also displayed in the **Original Document (A).** Then, work on the suspects using the following options:
    - Click **Accept and Find (B)** to confirm the interpretation is correct and go to the next suspect. If you believe the OCR engine returned an incorrect result, you can fix it manually and then click **Accept and Find** to replace it.
    - Click **Find Next** to go to the next suspect.
    - Click **Not Text** for the suspect that is not a word.

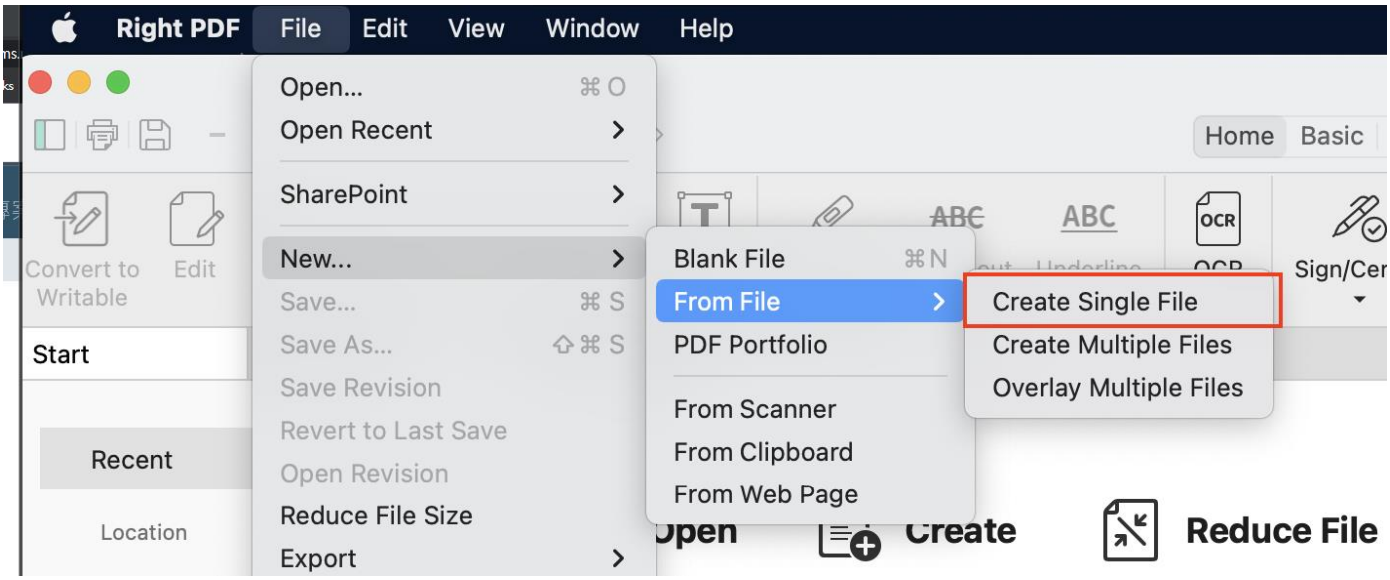
Note: Find Suspects works only when you choose to make the text of your scanned document searchable, which retains the look of the original scanned document while making the text searchable.



Convert file(s) to PDF

It is possible to create PDFs from different file types within Right PDF, without having to open them in their native applications.

You are able to select one or multiple files and directly open all of them as PDF documents in Right PDF. All the selected files are converted separately and opened in respective PDF documents.



Create PDF from a single document

1. Choose **File > New > From File** .
2. Select **Create Single File**. In the Open dialog box, select the file to convert. You can browse all file types or select a type from the drop-down menu.
3. Click Open to convert the file to a PDF.
4. When the new PDF opens, choose **File > Save or File > Save as**, and then give it a name and specify a location to save.

Create PDFs from multiple files

You can create PDFs from files of supported formats directly within Right PDF. This method is especially useful when you need to convert a large number of mixed files to PDF.

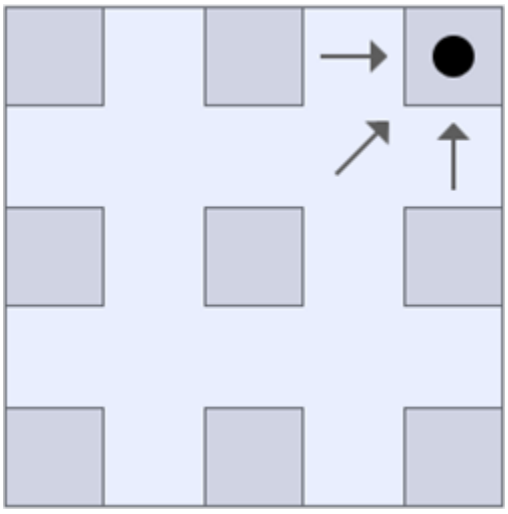
1. Choose **File > New > From File** .
2. Select **Create Multiple Files.** In the Right PDF Converter window, click the Add button at the top and choose files to convert. Click Open.

3. To delete, remove all, and/or arrange the order of selected files:
    - Click on one file or hold down **Ctrl** to select files. Click **Delete** to delete selected files.
    - Click **Clear** to remove all files from the list.
    - Click on one or hold down **Ctrl** to select files. Click either **Up** or **Down** to move them forward or backward.
4. Click the **Convert** button.
5. In Save As dialog box, enter the file name and choose a location to save. Click **Save**.
6. View the results in Conversion Result dialog box.

Overlay multiple files into one PDF

The contents of selected source files can be overlaid. At least two source files or above are required.

1. Choose **File > New > From File** .
2. Select **Overlay Multiple Files**. In the **Overlay File** window, click the **Add** button at the top and choose files to be overlaid as one PDF document. Click **Open**.
3. To delete, remove all, and /or arrange the order of selected files:
    - Click on one file or hold down **Command** to select files. Click **Delete** to delete selected files.
    - Click **Clear** to remove all files from the list.
    - Click on one or hold down **Command** to select files. Click either **Up** or **Down** to move them forward or backward.
4. You can click Options and select a location for overlaying in Overlay Option dialog box.



5. Click the **Overlay files** button.
6. In the Save As dialog box, select a location to save and click **Save**.
7. See results in the Overlay Results dialog box.

To create a PDF from clipboard

Create a PDF from the Clipboard lets you quickly create a PDF file from what you recently saved to the clipboard, making it easier to share screenshots and images with other users.

1. Copy or cut the text, image, or part of the screen, etc., to be converted to a PDF document.
2. Choose File > New > From Clipboard and click From Clipboard.
3. The generated PDF document is opened directly in Right PDF.

Create a new PDF from web page

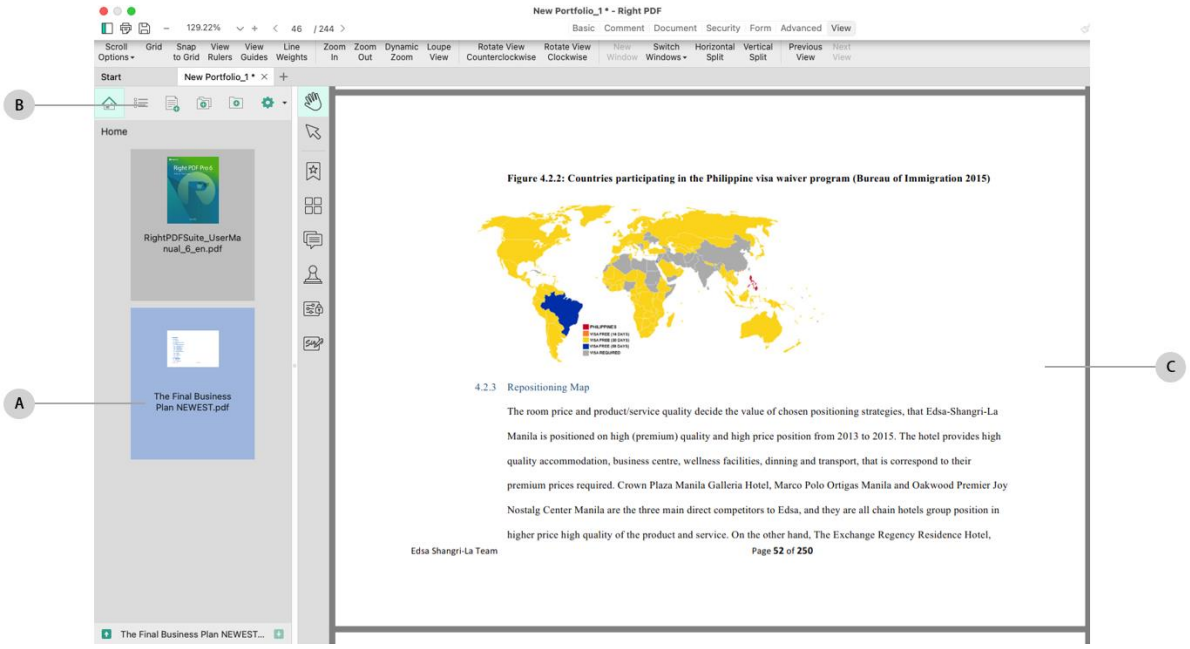
You can directly turn web pages to PDF with Right PDF. While links and images will show and function just like the original web page, animated files will appear as still images of last frame of the animation in the result PDF. You are also able to convert webpages in Chrome or Firefox to PDF, but if you want to convert all or certain levels of website content to PDF, do it within Right PDF.

1. Open Right PDF and select **File > New > From Web Page**.
2. In the Create PDF from Web Page dialog box, enter URL in the field box, or click **Browse** and locate a HTML file.
3. Decide the number of levels to convert. Or select **Get entire site** to convert all levels of the website. If Get only _ level(s) is selected, select one or both of the following options:
    - **Stay on same path**: Converts only web pages subordinate to the specified URL.
    - **Stay on same server**: Converts only web pages stored on the same server.
4. Click **Settings…** and change the selected options in the Web Page Conversion Settings as needed. Click **OK**.
5. Click **Create**.

Creating PDF Portfolios

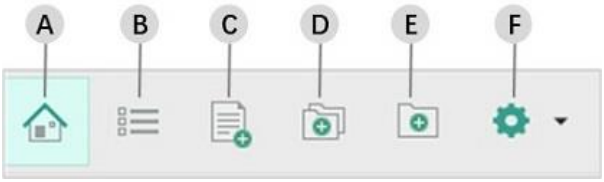
PDF Portfolio overview

A PDF Portfolio is a collection of files packaged into an integrated PDF unit. You can add any files to a PDF Portfolio, such as Excel spreadsheets, Word files, PDF documents, images, email messages, or even U3D files. However, PDF is the only format that can be opened and viewed in a PDF Portfolio. See the following for more about Right PDF Portfolio workspace.



A. PDF Portfolio's navigation pane to the left comprises cards representing component files and folders.
B. PDF Portfolio toolbar allows navigating through files in a list view, adding files or folders, making changes to portfolio settings, and sorting component files.
C. PDF Portfolio document pane.

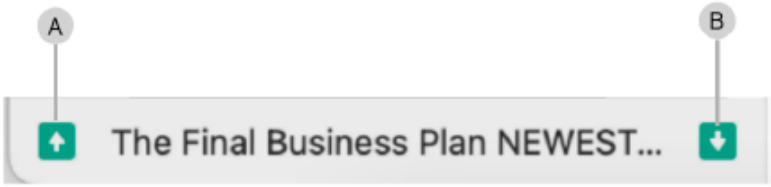
The PDF Portfolio toolbar



- **Go home to navigate through files visually (A)** lets you get back to view components in a grid view that displays cards representing component files.
- **Go to list view to navigate through files using file details (B)** displays components in a list view with details of file properties.
- **Add files (C)**. Select and add individual files.
- **Add Existing Folder (D)**. Add selected folders.
- **Create New Folder (E)**. Create a new folder.
- **Option (F).** You can sort components files and folders by description, compressed size, etc., select all files/folders, hide/show the cover sheet, and edit portfolio properties.

Scroll through component files

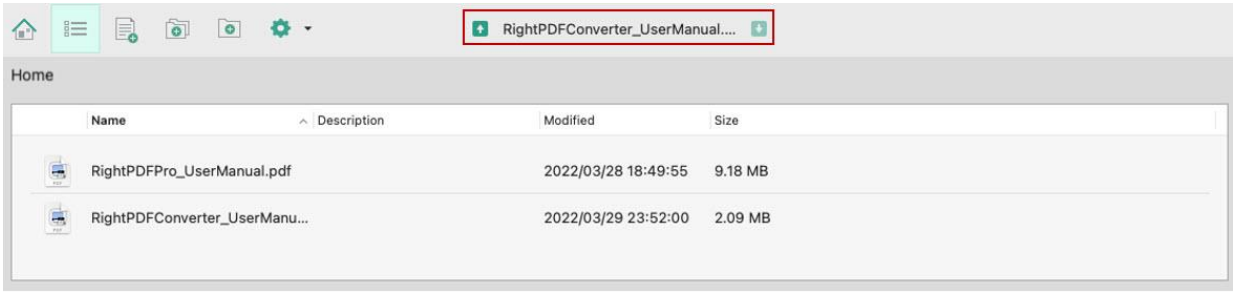
You can scroll through component files using the Open Previous (A) and Open Next (B) buttons, which are located at two different places depending on the current view. The Previous button lets you go back to the previous file and the Next button move forward to the next file.



- If you are visually viewing a PDF Portfolio in a grid view, the buttons appear at the bottom of the component file pane to the left, as shown below.



- In a list view, they appear in the upper part of the document pane with an adjustable border, as shown below.



Note: the Open Previous and Open Next buttons switch between files placed in the same path level in your PDF Portfolio. For example, if there are a bunch of files and a folder placed under Home/ and you open one of the files, the buttons switch through only those files, and contents in the folder are not included (Home/folder).

Create PDF Portfolios

Portfolio generally refers to an organized presentation of an individual's experiences, work samples, etc., allowing users to quickly view an entire collection of related files. It is easy to create a PDF Portfolio, add files and edit Portfolio properties. You can create folders within your PDF Portfolio, move and delete component files, and search for words or phrases within selected documents or an entire PDF Portfolio. You can create a basic PDF Portfolio in a few steps:

1. Start Right PDF and choose File > New … > PDF Portfolio, and click the Create PDF Portfolio button to the right.
2. You can start adding contents to an existing PDF Portfolio. Click Add files/Add Existing Folder and select a file or folder to add to the PDF Portfolio. You can select one or more files/folders.
3. Save the PDF Portfolio by doing one of the following: On the Quick Access Toolbar, click Save. Or choose File >Save.

Add files and folders to a PDF Portfolio

You can add contents to an existing PDF Portfolio by doing any of the following:

- Click Add files or Add Existing Folder to add individual files or a folder.
- To create a folder, click Create New Folder and name it. Click OK.
- Drag and drop the file or folder in the work area of portfolio.
- To move files and/or folders to a different folder, click and drag them to the new folder.

To remove files and folders from a PDF Portfolio

You can delete a file/folder or multiple files/folders. If you delete a folder, all files within are deleted from the PDF Portfolio along with the folder.

- To delete a file/folder, right-click on it and select Delete. Click Yes.
- To delete multiple files/folders, hold down Command on your keyboard and select the files/folders to be removed from the Portfolio. Right-click any of the selected files/folders and select Delete. Click Yes to delete all selected items.

Note: you can hold down Command to select multiple files or folders. To select all files and folders within the PDF Portfolio, right-click on anywhere and select Select All.

Working with component files in a PDF Portfolio

Right PDF provides portfolio viewing options that enable users to present content in an optimal layout. There are two ways to navigate through files/folders: View files in a grid and View files in a list. You can then sort and change the order of displayed columns and files or folders under certain columns, as well as edit component file names and descriptions in a PDF Portfolio.

Navigate through files in a list/grid

You can choose to view component files in a list or a grid view. By default, files are placed in grid but you can switch to a list view by clicking the Go to list view to navigate through files using file details button on the PDF Portfolio toolbar.

- **View files in a grid:** All component files/folders are presented in Grid view by default, which are used mainly for presentations or brochures. In a Grid view, each card represents a file or a folder and also shows thumbnail and information about the document, including file name and description.

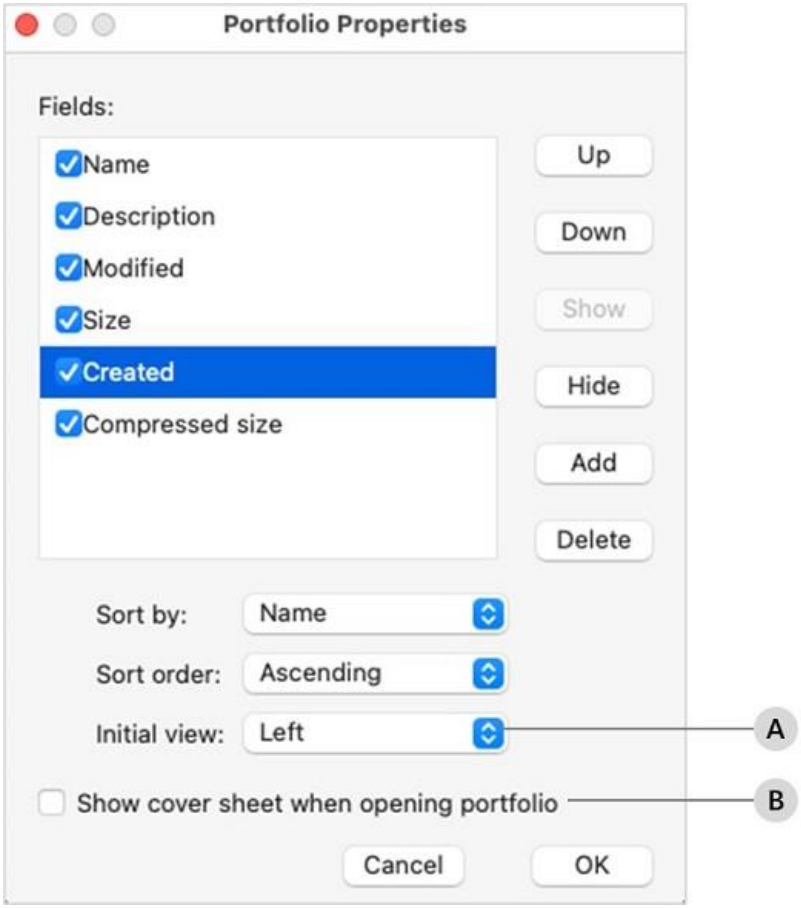
  To switch from list view to a grid view, on the PDF Portfolio toolbar, click Go home to navigate through files visually to restore grid viewing.

- **View files in a list:** You can choose to view files/folders in a list that shows the details of component files. By default, the columns contain properties including name, description, date modified, and size. You can also change the order and edit file properties of the displayed columns by using the Portfolio Properties dialog box.

Set an initial view when opening Portfolio

You can decide the way all files/folders are arranged and whether to show cover sheet when a PDF Portfolio document is first opened. Right PDF provides the following three ways, Top (list view), Left (gird view) and Minimized (files hidden) to customize your PDF Portfolio workspace.

- **Where to show the files/folders list in Portfolio**
    1. On the PDF Portfolio toolbar, click Option and select Portfolio Properties... from the options.
    2. In the Portfolio Properties dialog box, choose from Top, Left or Minimized in the Initial view drop-down menu to decide how to display the files and folders list when you first open the PDF Portfolio.
    3. Click OK.
- **Whether to show cover sheet**
    1. On the PDF Portfolio toolbar, click Option and select Portfolio Properties... from the options.
    2. In the Portfolio Properties dialog box, if the portfolio panel is currently showing cover sheet, check **Show cover sheet when opening portfolio** option to display the default cover sheet when you first open the Portfolio; otherwise, the option will become **Show current document when opening portfolio**, which displays the current document instead.



Edit file details in a list

You can decide which details are on display when you navigate through files in a list view.

1. On the PDF Portfolio toolbar, click the Option button and select Portfolio Properties... from the options.
2. In the Portfolio Properties dialog box, do either of the following to select the fields to be displayed in the list:
    - Check the checkbox of the field you want to display in the Fields settings box. Or select to highlight the field and click the Show/Hide button to make it visible/invisible.
    - To rearrange the field order in the file list, use the Up/ Down buttons to move the selected field forward or backward.
    - To add a new field to the list, click the Add button and then type a name in the Enter new field name field box. Click OK.

- To delete existing fields, click on the item in the Fields box and then click the Delete button to remove it from the list. Default fields, such as name, cannot be removed from the file list, but you can hide them by unchecking their checkboxes if needed.

Sort and change the order of files or folders

By default, component files are placed following alphabetical order, but you can change the order by sorting files or folders by values and by ascending (A-Z) or descending (Z-A) order.

1. On the PDF Portfolio toolbar, click the Go to list view to navigate through files using file details button to view all component files/folders in a list view.
2. On the PDF Portfolio toolbar, click the Option button and select Portfolio Properties... from the options. In the Portfolio Properties dialog box, do the following to change the order in which component file/folders are displayed in the file list:
    - Choose the type of field to be sorted alphabetically from the Sort by drop-down menu.
    - Choose to sort files/folders in the selected column by ascending or descending order from the Sort order drop-down menu.
    - Move the cursor over the column name you want to sort by, then click it. Click the column name again to reverse the sort order.

Edit component file names and descriptions in a PDF Portfolio

You can edit the file name and description of a component file in either a list view or a grid view.

- To edit the file name of a component file, do either of the following:
    - In a grid view, select a file and click the file name text box (A) to show the insertion point. Then type text in it and press Enter.
    - In a list view, select a file and double-click the text box under the Name column to show the insertion point. Then, type text in it or right-click the file name and select Edit Value > Name, then enter the new name and click OK.

Note: if you change the file extension, a message shows up to inform you the file may not be opened or displayed correctly.

- To edit the description of a component file, do either of the following:
  - In a grid view, select a file, click the area below file name, and type in the text box.
  - In a list view, double-click the text box under the Description column to show the insertion point and then type text in it or right-click the file name and select Edit Value > Name, then enter the new name and click OK.



In a grid view, double-click the file name (A) text box to edit the file name and the Add Description (B) text box to edit the description of the selected component file.

Search a PDF Portfolio

You can search through all PDF documents within the PDF Portfolio, Selected Portfolio Documents, or the current document for specific words, phrases, or patterns such as phone numbers. The default Search window provides basic search options to help you narrow down the results.

On Menu Bar, click Edit > Search, or Basic tab > Search to open the Search window.

Search For

By default, the Search window displays basic search options that can help you narrow down results.

- **To search the current document:** It searches through the document you are currently viewing instead of the entire PDF Portfolio.
- **To search selected content within a PDF Portfolio**: You can search for specific words or phrases in the selected PDF documents.
- **To search all PDF documents within a PDF Portfolio**: You can search for specific words, phrases, or patterns in the entire PDF Portfolio.
- **To search selected content within a selected folder:** You can search for specific words or phrases in the selected folder.
- If you choose to search an external folder or indexes, click on Advanced and specify the Additional Criteria that follows.
- If you choose to search Currently Selected Indexes, you must have selected indexes files in Index Manager. Otherwise, you have to select Select Index... to add Index files (*.zpi).

What word or phrase would you like to search for

Enter the text or phrase to search for.

- **Single word or phrase**. Enter the word or phrase you would like to search for and define its searching options:
- **Multiple words or phrase.** You can search for more than one words or phrases. Click Select Words... and add new words or phrases.
- **Patterns.** Select a type of information you would like to search for from the drop-down menu. Click Search.
- **Arbitrary mask.** It changes the format category to custom and makes another text field available, in which you can type a custom format.

In addition, other options like Match Case, Match whole word only, Include Comments, Include Bookmarks, Include Subfolders and Stemming are also available.

Notes: searches do not apply to non-PDF files inside PDF Portfolios.

Convert with Right PDF Office Addin

In Microsoft Office applications, Right PDF Office Addin is a tool that you can use to directly convert your MS Office files to PDF, or send as email attachment.

To create a PDF

1. Open a file to be converted to PDF in MS Word/Excel/PowerPoint.
2. Among ribbon tabs, choose **Right PDF**.
3. (Optional) You can change PDF conversion settings by clicking **Settings**.
4. Select either **Convert To PDF**or **Convert To PDF and E-mail**:
    - Select **Convert To PDF**. It directly converts the current file to a PDF document and saves it in a location you specify.
    - Select **Convert To PDF and E-mail**. Select this if you want to send the PDF as an email attachment. Your default mail client appears right after the conversion is done. Then you can enter recipients, a subject, and send the attached PDF document.

To change PDF conversion settings

Adjust conversion settings to specify compatibility for the result PDF, or set an Open or Permissions Password.

1. Choose **Right PDF > Settings**.
2. In the **Settings** dialog box, set the conversion settings as needed and then click **OK**:
    - **Word – PDF Options**
        - **Compatible with**: It decides the PDF version of result PDFs. Right PDF 6.0 supports PDF version 1.3 to 1.7, 2.0, and PDF/A. You might have to change the compatibility level of a PDF file to match the version of your client or colleague's PDF application. Generally speaking, we recommend always using the most recent version (in this case, PDF 2.0); however, if the document would be

distributed widely, consider using PDF 1.5 to ensure that all recipients can view and print your document.

- **Embed Document Information**. Checked by default. When checked, it will embed information such as author and subject in the result PDF.
- **View Result PDF**. Open result PDF when conversion is complete.

- **Security**
  - **Encryption Strength:** specify the type of encryption used to secure the output PDF documents.
  - **Require password to open the document.** correct open password is required to open the output PDF document.
  - **Use a password to restrict printing, editing and modifying security settings of the document.** Select to restrict certain functions, such as printing, copying or extracting content, annotating, editing, modifying, and more. However, this password does not restrict opening the PDF.

3. Click OK.

Covert web pages to PDF in Google Chrome & Firefox

*This feature is only available in the macOS version of Right PDF from the official website and is not included in the App Store subscription.

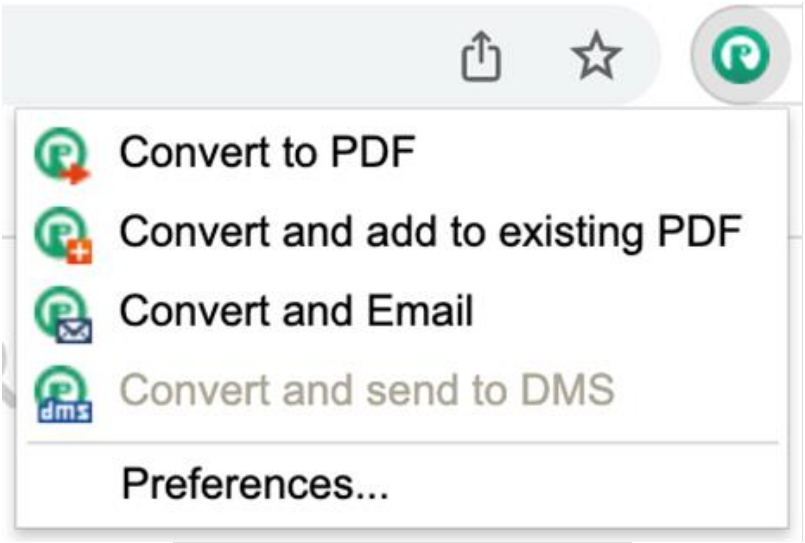
Using the Right PDF extension in Chrome, you can convert the web page currently displayed to PDF in various ways.

Add Right PDF Extension

Google Chrome

1. In Google Chrome, click the **Customize and control Google Chrome** icon ⋮ and choose **More tools** > At the bottom of the Extensions page, click **Get more extensions**.

2. In the Chrome Web Store page that opens, type in Right PDF in the **Search the store** box at the upper left corner of the screen and press Enter.
3. Click the **ADD TO CHROME** button and Add extension to add to the browser.



Right PDF extension commands

Firefox

1. In Firefox, click on the **Open menu** button at the upper right corner and choose **Add-ons and themes**.
2. In the panel to the left choose **Extensions** and search for “Right PDF”.
3. Click Right PDF in search results and click **Add to Firefox**.
4. In the popup dialog box, click **Add** to add the extension to the browser.

Convert web pages to PDF

Use the extension commands to convert the currently open web page to PDF and further manage the output PDF files. You can add it to an existing PDF, send it as an email attachment, or save it to DMS.

1. Go to a web page using Firefox or Chrome.

2. Click on the Right PDF extension icon  next to the address bar to display the command menu, and do the following:

   - **Convert web pages to PDF**. Choose this to create a PDF from currently open web page. Then select a location, type a filename (or keep the automatically created filename) and click **Save**.
   - **Convert and add to existing PDF**. Choose this to add the output PDF file to another PDF in your computer. Then locate and select the existing PDF file to which the converted web page is added and click **Save**.
   - **Convert web pages to PDF and send as email attachment.** Choose this to convert the currently open web page and send the output PDF file as an email attachment. Then specify a location and a filename for the PDF, and click **Save**. The output PDF file is automatically attached in a new email message that opens after the conversion is complete. Type in any information and click **Send**.
   - **Convert and send to DMS**. Choose this to send the output PDF file to DMS. In the **DMS Selection** dialog box that opens, select **SharePoint** and click **OK**. In the SharePoint dialog box, click **Manage…** and type or paste an IP address in the **Site** field. Click **Add** to move the site IP to the List box below and click **Close**. Back to the SharePoint dialog box, select a site IP from the **Select a site** drop-down menu and click on **Connect**. Then click on **Save** and in the Save as name dialog box, rename the file and click **OK**.
   - (Optional) Choose **Preferences…** and check the option **View result PDF** to automatically open the output PDF after conversion. Click **OK**.

Chapter 5: Editing PDFs

Editing PDFs

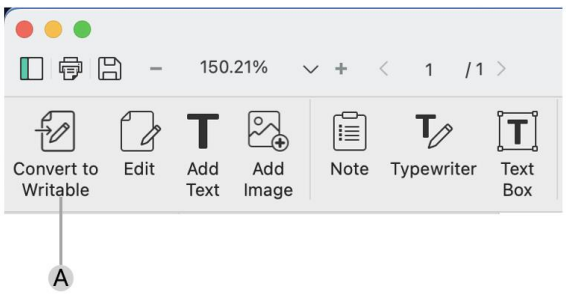
Right PDF (macOS) provides two editing modes: **Write mode** and **Review mode**. The features in Write mode are designed to make editing PDF documents easy and intuitive, while Review mode offers rich PDF functions such as annotation, signature, password and interactive forms.

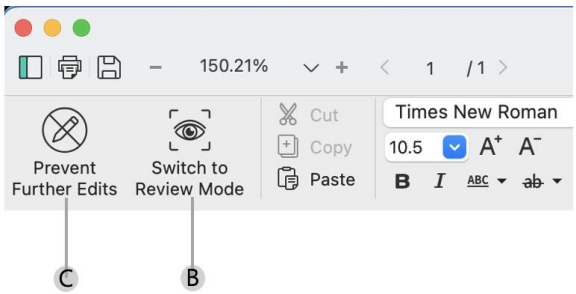
You automatically enter Review mode whenever you open a PDF document. But once you create a blank PDF, the default mode becomes Write mode. In Review mode, use the **Convert to Writable** feature to enable Write mode and transform your PDF into an editable document. Afterwards, you may switch between two modes at will until you click **Prevent Further Edits**.

Editing in Write mode

How to change from Review to Write mode?

Convert to Writable (A) transforms the current PDF document into an editable state called Write mode, in which you can edit and manipulate contents, just like that way MS Word does. In Write mode, you may directly switch to Review mode anytime using **Switch to Review Mode (B)** to use the features therein. To remove writability, click **Prevent Further Edits (C)** to permanently revert to Review mode unless you use the **Convert to Writable** feature again.





Do the following to switch to Write mode:

1. Open a PDF file in Right PDF and choose **Home/Advanced** > **Convert to Writable**  .
2. In the **Convert to Writable** dialog box, depending on the content of document, select either **Document** or **Form**. You may select the other options such as Preserve original layout or Conversion Range. Click **Convert**.
3. A progress bar appears in the bottom-right corner of the document pane. You will enter **Write mode** after conversion is over.

Note: The time required for conversion varies according to size and complexity of the document. Once the **Prevent Further Edits** feature is executed, you need to start over to make it editable again.

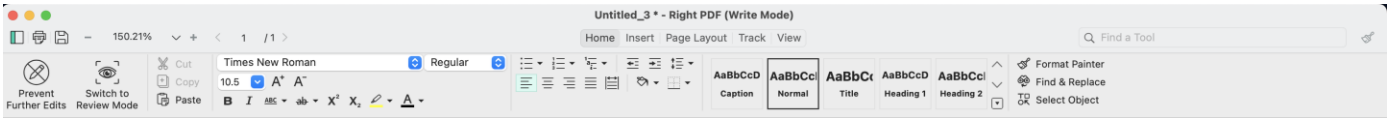
Key editing features

The Write mode offers the following editing features:

- Full-Scale Text Editing
- Insert Table, Picture, Graphic and Clipart (Write mode)
- Page layout setup
- Spell-check all text
- Insert Headers and Footers (Write mode)
- Insert Hyperlink
- Insert Table of Contents
- Insert bookmarks
- Format paragraphs
- Navigate through a PDF using Document Map
- Track changes
- Find and replace text and numbers

Full-Scale Text Editing

You can revise text, change text attributes such as font, font size and color, or adjust paragraph types, word spacing and word shading.



1. Open a PDF file and use the **Convert to Writable** feature.
2. In the **Convert to Writable** dialog box, select either **Document** or **Form** depending on the content of you document. Click **Convert** and enter **Write mode**.
3. In Write mode, select the text your wish to edit in one of the following ways and proceed to edit:
    - Click-drag to select an area.
    - Double-click to select an entire word.
    - Triple-click to select the entire text block.
4. Go to **Home > Font/Paragraph** or right-click on the selected text and select **Font…** or **Paragraph…** from the options to change text attributes or paragraph options as needed.

Insert Tables, Pictures, Graphics and Clipart

Tools like Tables and Illustrations serve to enrich your PDF documents, such as inserting tables to organize information or adding Picture, Clip Art, Graphic, and Screenshot as visual aids to enhance readability of documents.

Insert Tables

1. Do any of the following to enable Write mode:
    - If the PDF file is opened in Review mode, use **Convert to Writable** to switch to Write mode.
    - Create a blank PDF by choosing **File > New > Blank PDF**.
2. Select a space where you want to insert a table.
3. Choose **Insert > Tables > Table**  and select the size you need or click **Insert Table…** and enter rows and columns manually.

4. (Optional)To add extra rows or columns to an existing table, click anywhere inside the table to display the **Table** tab (A) and the associated features. Choose **Insert** and determine where to add extra rows and columns (B).

Insert Graphic/ Clipart

1. Open a PDF and switch to Write mode, or create a blank PDF file.
2. Choose **Insert** > **Graphic** / **Clipart**, or open their panel.
3. Do any of the following to insert item:

    - Drag item from **Graphic** / **Clipart** panel to the position you want on the page.
    - Select an illustration/clip art item, and click-drag a rectangle as the frame. When finished, release the mouse to have clip art showed up in the frame.
    - (Clip Art only) Right click a Clip Art item and select **Insert**.

Insert Pictures or Screenshots

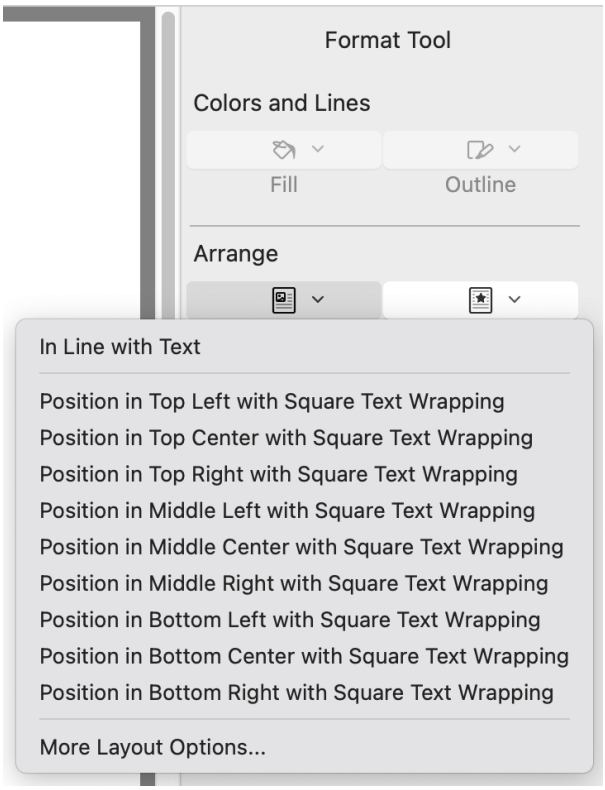
1. Open a PDF and switch to Write mode, or create a blank PDF file.
2. Do any of the following:

    - To insert from local device, select Insert > Picture. Select an image in the popup dialog box, and click Open to insert it to the page.
    - To insert screenshot, select Insert > Screenshot, and use the cross cursor to drag a rectangle as the frame. Click Done on the toolbar under the image to apply it to the present PDF file.

Positioning a picture and changing text wrapping settings

To change how graphics or pictures position, click the graphic/clipart/picture object to show Format Tool panel to the right. Use commands in Arrange for adjustment:

- **Position:** this drop-down menu offers the following options:



- **Text Wrapping:**
    - Select **In Line with Text** to have the selected image stay with the text that comes before and after it.
    - Select **Square** to wrap text around the border of the selected image.
    - Select **Behind Text** to have the text displayed over the selected image in any circumstances.
    - Select **In Front of Text** to have the selected image displayed over the text in any circumstances.
    - Select **Top and Bottom** to make text appear at the top and bottom of the image.
    - Select **More Layout Options…** to enter the Object Properties dialog box. Click the Text Wrapping tab to change the wrapping style or define the distance between the selected image and text.
- **Align**

Align an object

- **Align to Page:** Align selected object to somewhere on the page.

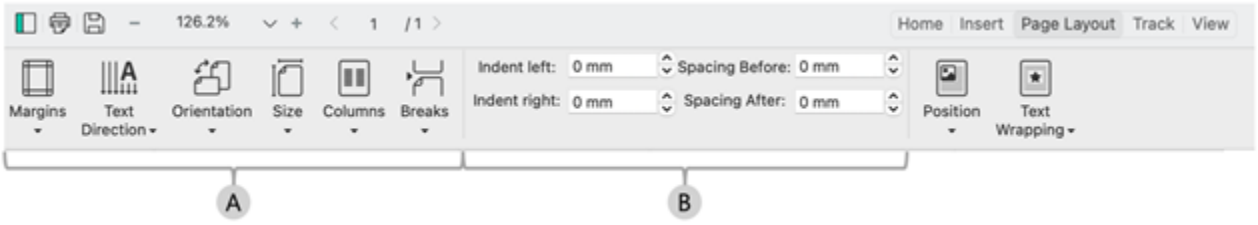
- **Align to Margin:** Align selected object to a certain margin on the page.
- **Align Selected Objects:** Align selected object with other objects.

Align multiple objects

- **Align Left:** Aligns objects along their left edges
- **Align Center:** Aligns objects vertically through their centers.
- **Align Right:** Aligns objects along their right edges.
- **Align Top:** Aligns objects along their top edges.
- **Align Middle:** Aligns objects horizontally through their middles.
- **Align Bottom:** Aligns objects along their bottom edges
- **Distribute Horizontally:** Arrange the objects at equal distances from each other horizontally.
- **Distribute Vertically:** Arrange the objects at equal distances from each other vertically.

Page layout setup

Using the tools in Page settings (A) and Paragraph (B) under the Page Layout tab, you can alter margins, text direction, orientation, and size; or apply indentation or line spacing values to the specified lines or paragraphs



Page settings

The Page Settings features let you configure basic page settings, such as margins, text direction, page orientation, and page size. Right-click anywhere on the page and select **Page…** from the options to open the Page Setup dialog box.

Formatting paragraphs

Specify an insertion point or select text. In the **Paragraph** tool bar, define the indentation and spacing values to directly apply to the entire paragraph or the line that contains an insertion point. You many also right click on the paragraph you want to change indentation and choose **Paragraph…** from the options to open the **Paragraph** dialog box for further adjustments.

In the General area of the Paragraph dialog box, choose one from the following alignment options: left, centered, right, justified, or distributed.



(top-left) *Aligning horizontal text to the right, leaving the left edge ragged;*
(top-right) *Justifying all horizontal text except the last sentence, which is left-aligned;*
(bottom-left)) *Aligning horizontal text to the center, leaving both edges of the paragraph ragged:*
(bottom-right) *Justifying all horizontal text, including the last sentence.*

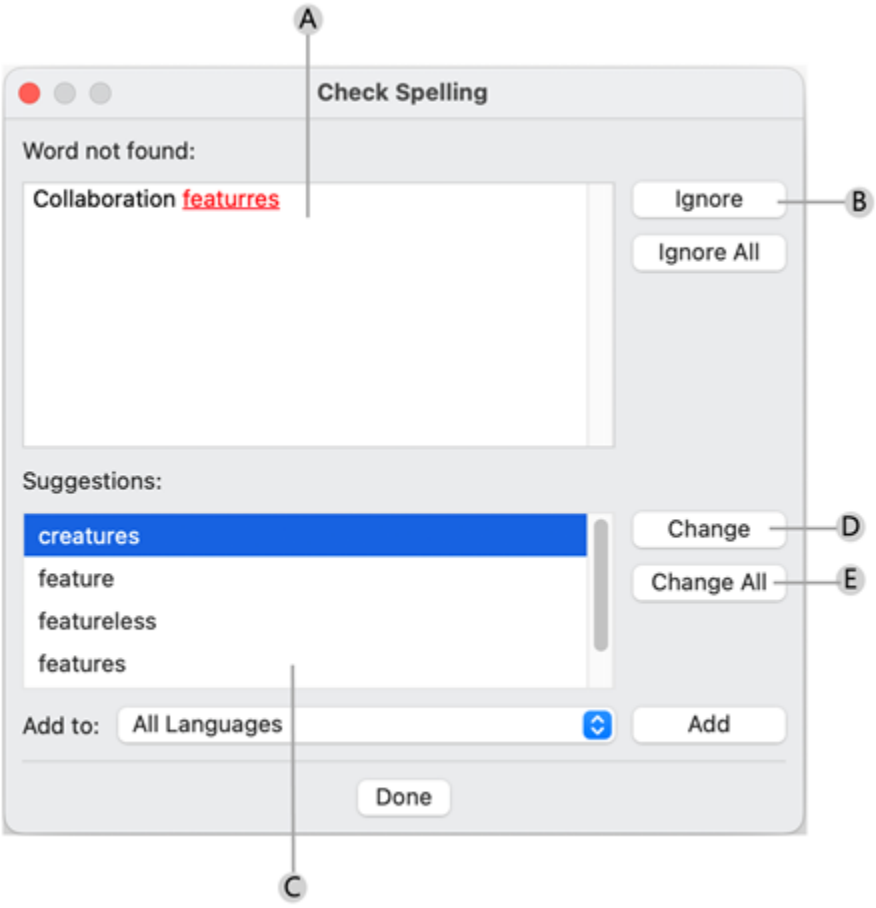
Spell-check all text

Using Check Spelling, you can spell-check all text in the current document and correct potential mistakes based on suggestions.

1. In Write mode, choose **Track > Check Spelling** ABC✓.
2. In the **Check Spelling** dialog box, click **Start**.
3. The first misspelled word is highlighted and underlined in red (A). Do any of the following as needed:

- Click **Ignore** (B) to skip the mistake.
- If you want to change a word, select a suggested correction from the **Suggestions** setting box (C) and click **Change** (D).
- Click **Change All** (E) to replace every instance of the unrecognized word with the first correction.

4. Repeat the previous steps to check spelling.
5. Click **Done**.



Insert Headers and Footers (Write mode)

In Write mode, you can edit and remove existing headers and footers created in Write mode. To edit those created in Review mode, you have to switch back to Review mode.

Insert the same header or footer in each page

You can place the same headers or footers across all pages in the document.

1. In Write mode, do any of the following:
    - To add a header, chose **Insert > Header** and then select **Edit Header**.
    - To add a footer, chose **Insert > Footer** and then select **Edit Footer.**
    - Double-click on the header or footer area near the top/bottom of a page.
2. An insertion point appears and then you can type text in the header or footer area.
3. (Optional) To quickly switch back and forth between the header and the footer, choose **Header & Footer > Navigation in the panel to the right**. Click **Go to Header** to move from a footer to a header; click **Go to Footer** to move from a header to a footer.
4. When finished, choose **Header & Footer > Close Header and Footer in the panel to the right** or double-click anywhere on the page.

Change the contents of a header or footer

1. In Write mode, do any of the following:
    - Choose **Insert > Header & Footer**. Select **Edit Header** or **Edit Footer** from the options.
    - Quickly double-click the dimmed header or footer area to have an insertion point appear.
2. Edit the header or footer with the features under the **Home** For instance, you can change its font size, font color, or other text attributes.
3. When finished, choose **Header & Footer > Close Header and Footer in the panel to the right** or double-click anywhere on the page.

Add different headers or footers to a document

Make the header or footer on the first page different from the rest of the pages

You use the Different First Page feature to differentiate the header or footer areas of the first page from the rest of the pages in the section. You can do this for any section in the document.

1. On the first page of the document, double-click the header or footer area.
2. Choose **Header & Footer > Options in the panel to the right** and check **Different First Page**.
3. Add headers or footers to the first page, or edit the existing headers or footers. The changes also apply to the first page of other sections as long as the **Different First Page** is checked for that section.
4. (Optionally) Uncheck **Different First Page** to restore the header or footer to its original text.

Make the header or footer different for odd & even pages

1. Double-click the header or footer area of the first page to create the header or footer for odd-numbered pages.
2. Choose **Header & Footer > Options in the panel to the right** and check **Different Odd & Even Pages**.
3. On one of the odd-numbered pages, click on the header or footer area, and enter text.
4. Choose one of the even-numbered pages, click on the header or footer area, and enter text.
5. Click **Close Header and Footer** in the panel to the right or double-click anywhere on the page.

Make the header or footer different in each section

You can make headers and footers unique to each page by breaking a document into sections so that each section displays different content.

- **Add section breaks to a document**: You need to add section breaks if you want to place different headers and footers in respective sections.
    1. Click on the place where you want to create a unique header or footer.
    2. Choose **Page Layout > Breaks > Section Break (Next page)** from the options.

3. Repeat the previous steps to add new sections.

- **Navigate through sections in a document**: You can use the Navigation tools in the Header & Footer panel to the right to locate each section break the document contains.
    1. Click **Next Section** to go to the header or footer of the next section break.
    2. Click **Previous Section** to go to the previous section break of the document.
- **Place different header or footer using the document section breaks**: You can use the existing section breaks in the document to configure headers and footers.
    1. Double-click on the section in which you want to add unique header or footer.
    2. Uncheck **Link to Previous**  in the Header & Footer panel to the right to disable it. The **Link to Previous** is on by default. Disable it to break the connection between the header/footer in this section with the header/footer in the previous section.
    3. Change the existing header or footer or create anew in the current section.
    4. Click **Next Section**  in the Header & Footer panel to the right to jump to the header or footer in the next section. Repeat step 2 and 3 to continue placing different header or footer.
    5. Click **Close Header and Footer** in the panel to the right or double-click anywhere on the page.

Remove all headers or footers from a document

1. Go to **Insert** tab.
2. Do one of the following as needed:

    - Click **Header** and select **Remove Header** to remove all headers from the document.
    - Click **Footer** and select **Remove Footer** to remove all footers from the document.

Note: If your document contains sections or if you have applied different first-page or odd-and–even header or footers, you cannot remove all headers or footers from the document at once. Make sure to remove the headers or footers from each different section or page.

Insert a page number

Do any of the following:

- Double-click the header or footer areas and position the cursor where you want to insert the page number and choose **Insert > Page Number** **> Current Position.** Then, choose a page number style.
- Choose **Insert > Page Number** . Select **Top of page** or **Bottom of Page** depending on where you want page numbers to appear in the document. Then, choose a position for the page numbers.

Note: in Write mode, you can edit and remove the headers and footers created in Write mode only. To edit the ones created in Review mode, click **Switch to Review Mode** to make revision.

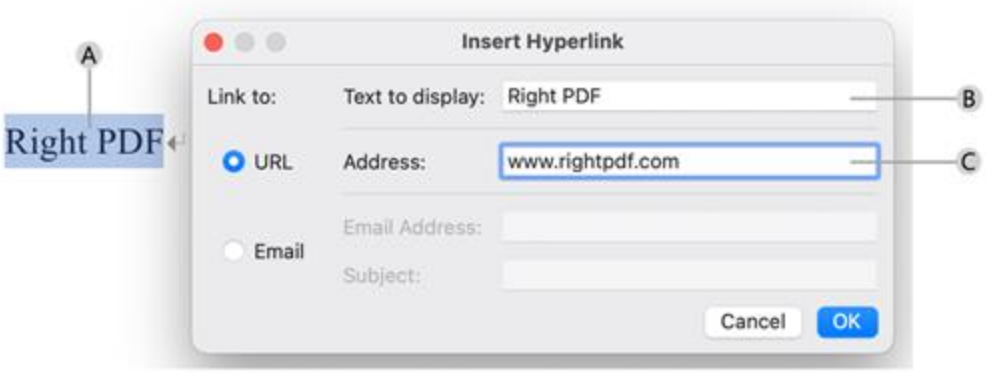
Insert Hyperlink

You can insert a hyperlink into the PDF documents so that readers can access specified content in another location. Optionally, you may set up the appearance of the hyperlink on the page either by selecting a text or typing a title in the **Text to display** field.

Note: if hyperlinks added in Write mode lack URL or mailto: in their Text to display will not function in Review mode.

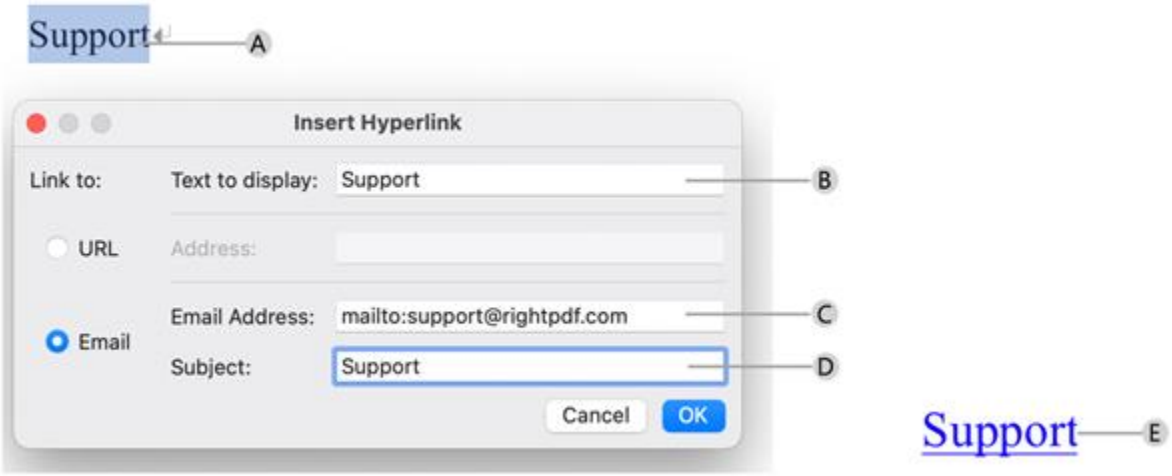
Create a hyperlink on a webpage

1. Select a space where you want to create a hyperlink and choose **Insert > Link** .
2. In the **Insert Hyperlink** dialog box, enter the text to display. If you already highlighted the text (A) in step 1, the text automatically appears in the **Text to display** field (B).
3. Copy and paste or type a URL address in the **Address** field (C) and then click **OK**.



Create a hyperlink to a blank email

1. Choose **Insert** > **Link** or right-click on the text and select **Insert Hyperlink…** from the options.
2. In the **Insert Hyperlink** dialog box, check **Email** and then enter the email address in the **Email Address** box.
3. In the **Subject** box, type the subject of the email message.



A.Selected text *B. Selected text set as the text to display* *C. Create a hyperlink to a blank email* *D. The subject of the email message* *E. The generated hyperlink*

4. To test the hyperlink in Write mode, place the cursor over the hyperlink and **Command + click** to follow the link. Or, go back to Review mode via **Home** > **Prevent Further Edits** and click the link.

Insert Table of Contents (TOC)

Create TOC

In Write mode, format your document using styles, such as Heading 1, Heading 2, and Heading 3, and Right PDF will automatically pick up these styles and add them to your table of contents. Once your document is formatted, follow the steps to create TOC:

1. In Write mode, click the place you want to insert TOC, and choose **Insert > Table of Contents**  **> Insert Table of Contents… to open** the Table of Contents dialog box.
2. Under Print Preview, decide whether to show page numbers, whether to right align page numbers, and whether to use hyperlinks instead of page numbers. You may also change **Tab leader**.
3. Under General, decide how many levels will be shown in TOC.
4. (Optional) You can click **Options…** to define the level for each heading style.
5. Click OK.

Update TOC

After TOC is created, if there's any changes in the document, you can do the following to update the TOC:

1. Choose **Insert > Update**
2. In the Update Table of Contents dialog box, select one of the following:
    - **Update page numbers only.** This only updates the pages that the headings are on, and ignores changes made to the heading text.
    - **Update entire table.** This will reflect any updates to the heading text, as well as any page changes.
3. Click OK.

Note: you can also right-click TOC and select **Update Field** to update it.

Delete TOC

Do either of the following to delete TOC:

- Choose **Insert > Table of Contents > Remove Table of Contents**
- Drag and select entire TOC, right-click on it, and select **Delete**.

Insert bookmarks

Bookmarks are navigation tool that servers to bring you to specified positions within a document. In Write mode, you can give each bookmark a unique name, for example, chapter 1, chapter 2, so that they are quickly identifiable.

Insert bookmarks

1. Select text, a picture, or a place where you want to insert a bookmark.
2. Choose **Insert > Bookmark**. In the Bookmark dialog box, type a name and click **Add**.

Note: do not start your bookmark name with a number, and space is not allowed. Use underscore or hyphen to separate entities if needed, e.g. First_heading.

Jump to a bookmark

1. Choose **Insert > Bookmark**.
2. In the Bookmark dialog box, select a bookmark from the list. You can also change the order by name or location.
3. Click **Go To**.

Delete bookmarks

1. Choose **Insert > Bookmark**.
2. In the Bookmark dialog box, select an existing bookmark.
3. Click **Delete**.

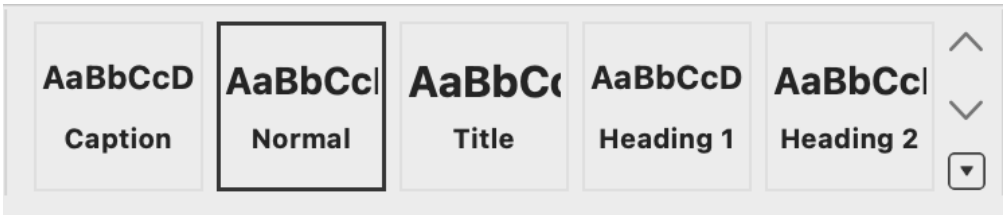
Format paragraphs

Using **Styles** correctly is the most efficient way to create a consistent, well-formatted document.

In **Write mode**, simply use **Styles**, i.e. a collection of formatting options, to format each kind of paragraph in your document. All styles are listed in the **Styles panel** on the left side of the Right PDF window. You can also personalize a style by modifying its Font and Paragraph.

How to apply a style to a paragraph

1. In **Write mode**, select a paragraph and choose **Home.**
2. Define the role the paragraph plays in the document. Click the thumbnail of the style you want to apply to the selected text. It could be a caption, a title, normal body text, or a heading.



Modify a style

1. There are three ways to open the Modify Style dialog box:
   - On the Home menu, choose Styles, right-click on a style and choose **Modify…**.
   - Click on **Styles** to open the Styles panel. Right-click on a style and choose **Modify…**.
   - In the Styles panel, choose a style and click **Modify Style** .

2. In the Modify Style dialog box, edit properties and formatting options. You can click **Format** to format font, paragraph and numbering.

Navigate through a PDF using Document Map

Document Map is similar to its namesake in Microsoft Word. It gives you an outline of your document, and all headings in the document are listed in the Document Map panel on the left side of your document pane. You can choose to show all levels, the highest-level headings only, or lower-level ones as well.

Please note that you must apply built-in heading styles to the headings in the document, so that they will be displayed in the Document Map panel.

Jump to a heading

You can easily navigate through your document using the headings in the Document Map panel, which always highlights the heading you are currently at.

1. Open the Document Map panel by clicking the Document Map icon  on the sidebar to the left, or choosing View > Document Map  .
2. In the Document Map panel, click on a heading and the cursor will jump to that heading in the document.

The number of levels Document Map displays

You can choose to show all levels, the highest-level headings only, or lower-level ones as well. There are two ways to control how many levels of headings will be displayed in the panel:

- Click the Options icon  and choose your preferred level in the Document Map panel.

- You can expand or collapse individual headings by clicking on the plus and minus icons next to the headings.

Track changes

Keep track of the changes you and your coworkers by making them easy to spot.

Changes are like suggestions which you can review, reject, or accept to make them permanent. There are several ways to display changes, which you can find in the Track tab. If you want to hide tracked changes, select **Final** or **Original**. **Final** displays the document as if all tracked changes were accepted, whereas **Original** displays the document as if you had rejected them, but both will only hide tracked changes instead of removing them.

Turn on or off Track Changes

On Track tab, choose **Track Changes**.

- When Track Changes is on, the section is highlighted. Different authors' changes are indicated with different colors.
- When Track Changes is off, the section is not highlighted. Right PDF stops marking changes, but the colored underlines and strikethroughs are still in the document.

Display tracked changes

1. In Write mode, choose Track tab.
2. There is a menu above **Balloons** where you can choose whether to display tracked changes in the document. Click the down arrow and choose one:
    - **Final: Show Markup.** It shows all the changes that have been made and formatted changes are temporarily accepted for review. All Changes except formatted changes are displayed inline, such as insertions, deletions and cell deletions. Formatted

changes, on the other hand, are displayed in balloons by default. You can choose not to display changes in balloons by selecting **Show All Revisions Inline** in Balloons .

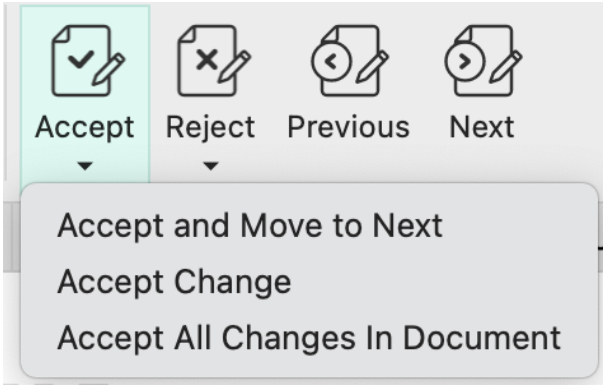
- **Final**. It displays the document as if you had accepted all the tracked changes. It hides but doesn't remove the tracked changes.
- **Original: Show Markup.** It shows all the changes that have been made. No changes are accepted and formatted changes are displayed in balloons by default. You can choose not to display changes in balloons by selecting **Show All Revisions Inline** in Balloons .
- **Original.** It displays your document as if you had rejected all the tracked changes in your document (hidden, not removed).

Review changes

Remove the markings by accepting or rejecting the changes. Right-click on the tracked changes and choose either **Accept Change** or **Reject Change**. Or you can click it and, on the Track tab, in the Review Changes group, click **Accept > Accept and Move to Next**, or **Reject > Reject and Move to Next**.

- **Accept** makes a change permanent.
- **Previous** and **Next** take you from one change to the next.
- **Reject** removes a change.

You can also accept or reject all changes at once. In the Reviews Changes group, click the arrow on the Accept or Reject button and then choose **Accept All Changes in Document** or **Reject All Changes in Document**.



Find and replace text and numbers

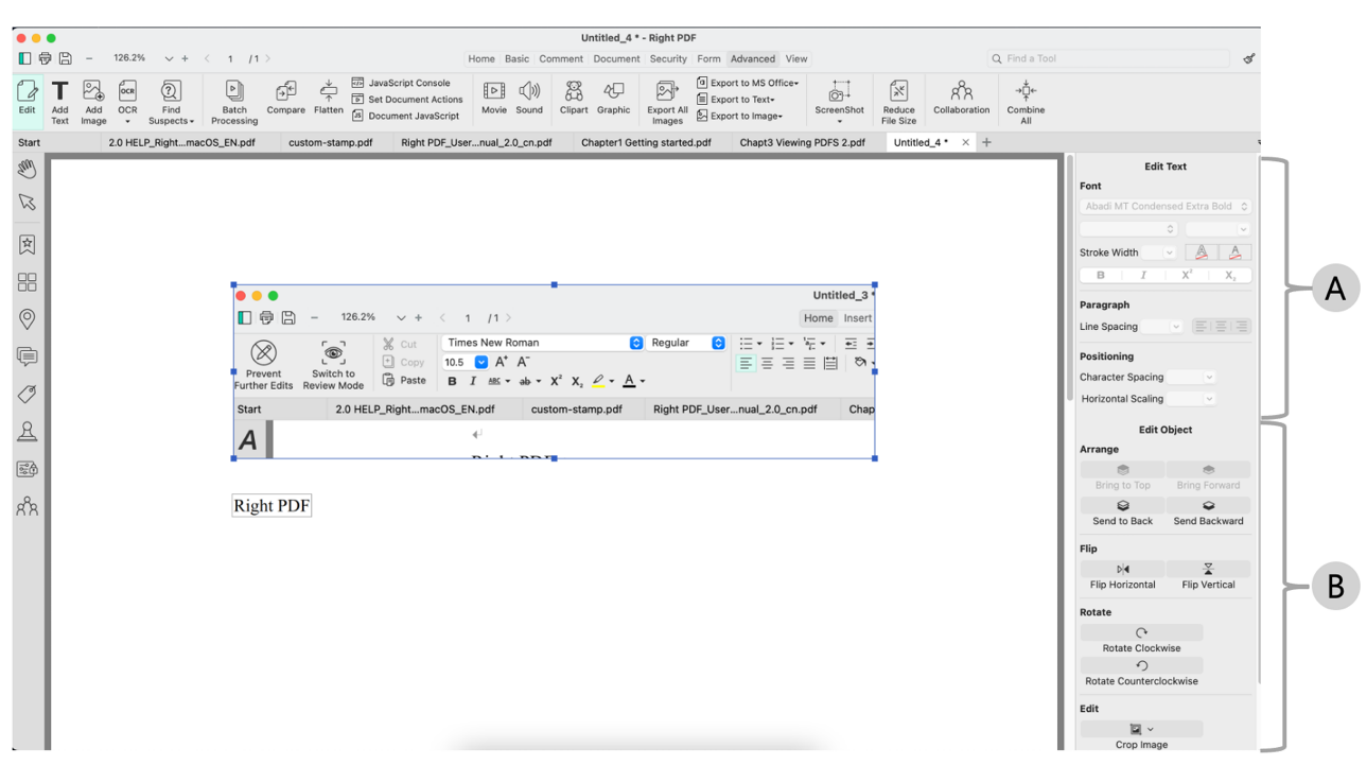


1. Choose **Home** > **Find & Replace**.
2. In the **Find and Replace** dialog box, click the **Find** tab to find text or numbers, or the **Replace** tab to find and replace text or numbers.
3. In the **Find what** field, enter the text or numbers you want to search for, and choose Current Selection or Main Document in **Find In**. Then in the **Search Options** area, define your search criteria by doing the following:
    - **Search:** Search the whole document, or from your cursor upwards or downwards. In the drop-down menu, chose Down, Up, or All.
    - **Match case:** Check to search for case-sensitive data.
    - **Match half/full width forms:** Matches half- and full-width characters in search results.
    - **Find whole words only:** Check to search for the cells that contain the exact characters you typed in the **Find what** field. Text that is part of another word is ignored.
    - **Use wildcards:** Find partial matches. For instance, "Conver*" finds "Convert", "Conversion", and "Converse"
    - **Special**. Find and replace page and character elements such as tabs, or Section Breaks.
4. Click **Find Next** to go to the next occurrence, and so on.
5. To replace the selected occurrence or all occurrences, enter the replacement characters in the **Replace with** field under the **Replace** tab and click either **Replace** or **Replace All**.

Editing in Review mode

Edit text

You can use the Edit tool to modify text and object directly without having to open the original document in another application. The features let you edit your PDF file on a small scale, for example correcting typos, changing font size, and adjusting paragraph layout.



*An object is selected using Edit tool. The Format sidebar to the right shows **Edit Text section (A)** and **Edit Object section (B)**.*

To add text to PDF

1. Select Advanced > Add Text.
2. Click anywhere on the page to create a bounding box.
3. Enter text when the cursor blinks.
4. Click-drag the handles to resize bounding box.

5. To move text box, move the cursor over the frame of the bounding box, and drag it to a new location when the cursor changes into a four-headed Move pointer.

To edit text in a PDF

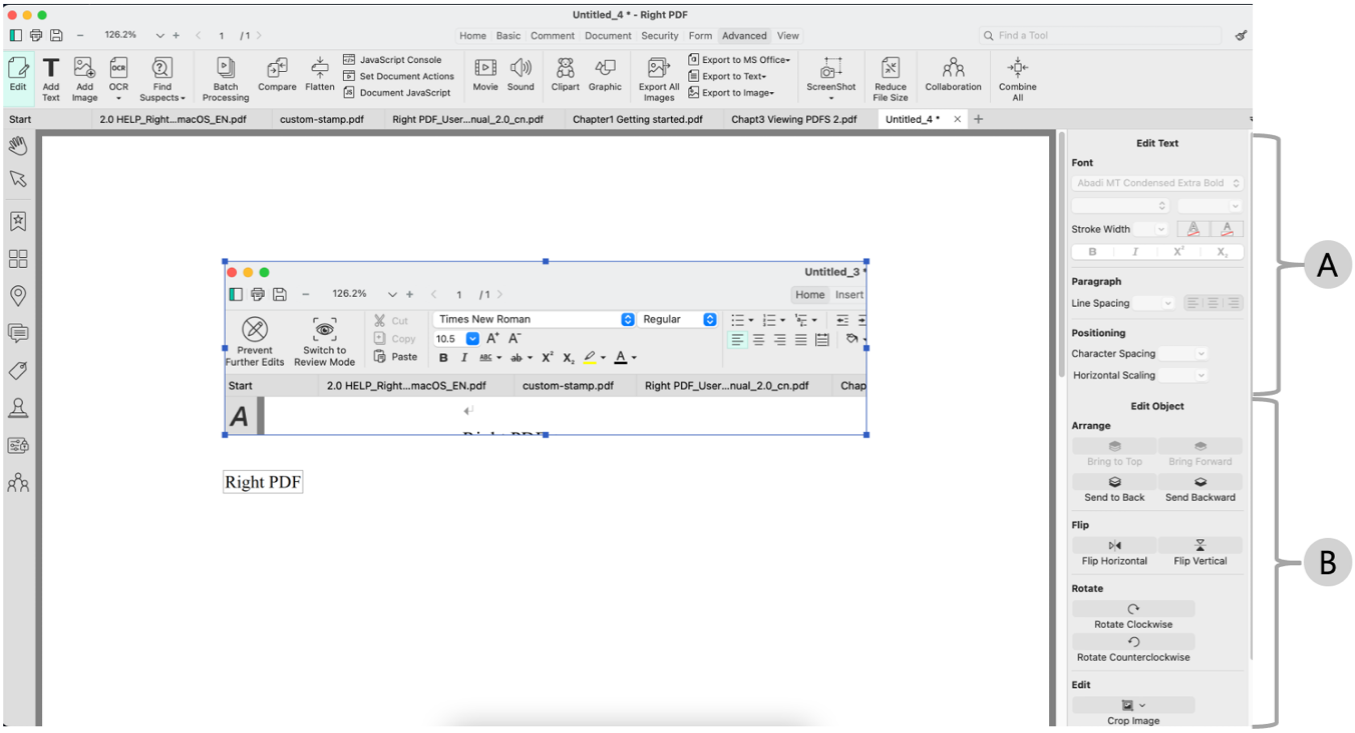
Using the Edit tool, you are able to edit the text on PDF, and adjust fonts or paragraphs.

1. Choose Advanced > Edit to enter Write mode.
2. In Write mode, you can edit or format text, or move or rotate bounding box.
    - **Edit**: Click the part of text you want to edit. When the cursor blinks, type in new text, paste or delete text. Using the Edit Text section (A) in the Format sidebar to the right, you can select a font, font size, a fill color, or another font in the Font section, as well as adjust text alignment, line spacing, character spacing and horizontal scaling.
    - *Move*: move your cursor over the frame of a bounding box and you will see a four-headed **Move** pointer. Drag the box to the desired location.
    - **Rotate**: place the cursor over the rotate handle. When the cursor changes into the **Rotation** pointer, drag in the direction you want it to rotate.
    - **Resize**: place your cursor over a selection handle. When the cursor changes into the **Resize** pointer, drag the handle to resize the text block.

Note: if the PDF contains fonts which are not yet embedded and installed in the system, you will not be able to edit text using the original font. Right PDF will attempt to use a similar font as replacement.

To add, move or resize an image

Choose Advanced > Edit to enter Edit mode. After the Format sidebar expands, use the Edit Object section (B) to manipulate selected objects.



*An object is selected using Edit tool. The Format sidebar to the right shows **Edit Text section (A)** and **Edit Object section (B)**.*

To add an image

1. Choose Advanced > Add Image.
2. In the ensuing dialog box, select an image file and click Open.
3. Drag the selection handles around the bounding box to resize the image. You can further rotate, crop, flip, or move the image using the Edit tool.

Move an object in front or behind other elements

1. Open the PDF, and then choose Advanced > Edit.
2. Select an object and go to Edit Object > Arrange section, and use the functions to arrange it: Bring Forward, Bring to Top, Send Backward, or Send to back.

To move or resize an object

1. Choose Advanced > Edit.
2. Do either of the following to move or resize:
    - To move the object, click on the object to show the bounding box with selection handles. Then use the four-headed Move pointer to drag the image to the desired location.
    - To resize the object, click on the object to show the bounding box with selection handles. Then drag a selection handle. The cursor changes into an arrow icon when you move it over the handles on the frame.

To rotate, flip, or crop an image

1. Choose Advanced > Edit.
2. Select an image to show the Format sidebar, and find the Edit Object section, which has the following functions. Alternatively, right-click on the object and select functions from the menu. Do the following as needed:
    - **Rotate:** select **Rotate Clockwise** to rotate the selected image 90 degrees in a clockwise direction, or **Rotate Counterclockwise** to rotate the selected image 90 degrees in a counterclockwise direction. Another way is that you can place the cursor over the rotate handle. When the cursor changes into the Rotation pointer , drag in the direction you want it to rotate.
    - **Flip:** select **Flip Horizontal** to flip the image horizontally, on the vertical axis. Or, select **Flip Vertical** to flip the image vertically, on the horizontal axis.
    - **Crop**: select Crop and drag a selection handle to crop the image. Select Remove Crop to undo and restore the original image.

Articles

Before the advent of the digital age, paper-based documents like magazines and newspapers arrange text in multiple columns which could span across pages. However, since printed material is

inherently different from electronic document, reading on screen could be difficult. This feature can guide readers through material presented in multiple columns and across a series of pages.

Define an article

To define an article, you can create multiple boxes around the content following the desired reading order, namely the *article thread*. By creating multiple boxes, you also establish a thread connecting them with text flow enabled.

1. Choose **Document > Add Article Box.** The pointer becomes a cross on the page.
2. Click-drag a rectangle to create the first article box, which appears around the enclosed text, and the pointer changes to the thread icon  .

   The label created along with the box consists of the article number and the sequence number thereof. For instance, the first box for the first article is 1-1, the second 1-2. The first box for the second article is 2-1, 2-2, and so forth.
3. Move on to the next part of document to be included in the article. Click-drag a rectangle around the text and repeat until the article is complete.
4. Press Enter to finish the article. In the **Article Properties** dialog box that follows, you may enter the title, subject, author and keywords, and click **OK**.

View articles on the page

1. Right-click the Sidebar Navigation Pane and choose **Articles**.
2. Do any of the following to start reading:
   - Double-click an article.
   - Right-click an article and choose **Read Article** from the drop-down menu.
   - Select an article, click **Articles options** in the upper left corner, and choose **Read Article**.
3. The view will jump to the beginning of the article, its first line in the upper left corner. Zooming will be automatically adjusted so that the article fills the whole screen.
4. You can do the following when viewing article:

- Click article box or press **Return** to jump to the next article box.
- Press and hold **Shift** and click article box, or press **Shift** + **Return** to jump to the previous one.

5. To hide Articles panel after opening an article, click **Articles options**  in upper left corner of Articles panel, and choose **Hide After Use** in the drop-down menu.

Note: before viewing articles, make sure you are using **Hand tool** and have selected **Right PDF > Preferences > General > Miscellaneous > Make Hand Tool read articles**.

Delete an article or article box

To delete article, do any of the following:

- Select article(s) in the **Articles** panel, and press **Delete**.
- Right-click the box, and choose **Delete**.
- Select article(s) in the **Articles** panel, and click **Delete selected articles**  . Click **OK**.
- Use **Add Article Box** command to select any box of an article, right-click it and choose **Delete** from the menu. In the dialog box that follows, choose **Article** to delete.

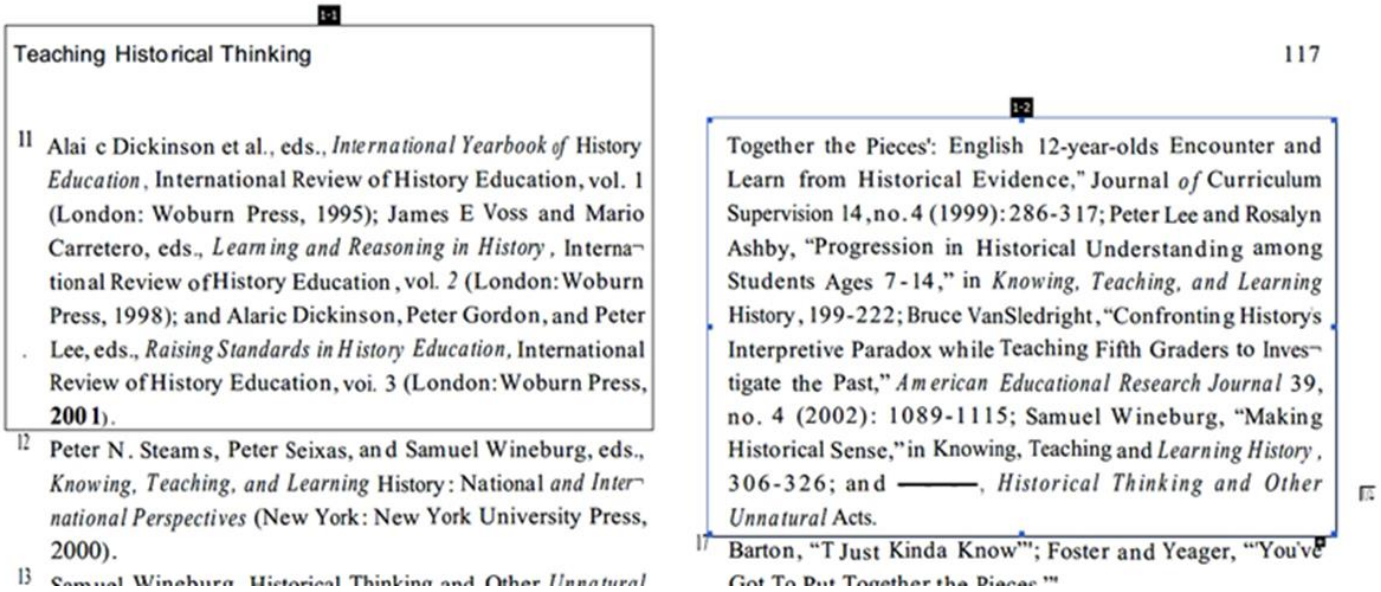
To delete article box, do the following:

- Use **Add Article Box** command to select any box of an article, right-click it and choose **Delete** from the menu. In the dialog box that follows, choose **Box** to delete.

Insert an article box

1. Choose **Document > Add Article Box**. Select the article box that you want the new box to follow.
2. Click the plus icon  below the lower right corner of the selected box, and start dragging a new box. Click **OK** when the message “Click and drag out to create a new article box” appears,

and then draw a new Article box that includes the text you want to insert. Press **Return** when finished.



Edit box properties

You can edit properties in the Article Properties dialog box, like article title, subject, author, and keywords. Do any of the following to open the dialog box:

- Choose **Document > Add Article Box, and double-click a box.**
- Choose **Document > Add Article Box. Right-click on a box and choose Properties from the menu.**
- Open the **Articles** panel, right-click an article and choose **Properties** from the menu.
- Open the **Articles** panel, select an article, and choose **Properties** from the Articles Options menu .

You can also select an article, and choose **Rename** from the Articles Options menu if you don't want to do it in **Properties**.

Combine two articles

1. Choose **Document > Add Article Box** and select an article box.
2. Click the plus icon ⊞ below the lower right corner of the article box.
3. Press and hold **Command** and click the article box you want to be read next. The second article is appended to the end of the first article. All article boxes are renumbered automatically.

Chapter 6: Commenting and Sharing PDFs

Commenting in PDFs

Commenting preferences

Commenting preferences affect the default appearance of and how you view annotations and markups in a PDF. To open the Preferences dialog box, do any of the following and select Comment from the options listed in the panel to the left:

- On Menu Bar, choose Right PDF > Preferences….
- Press Command + K on your keyboard.

Comment

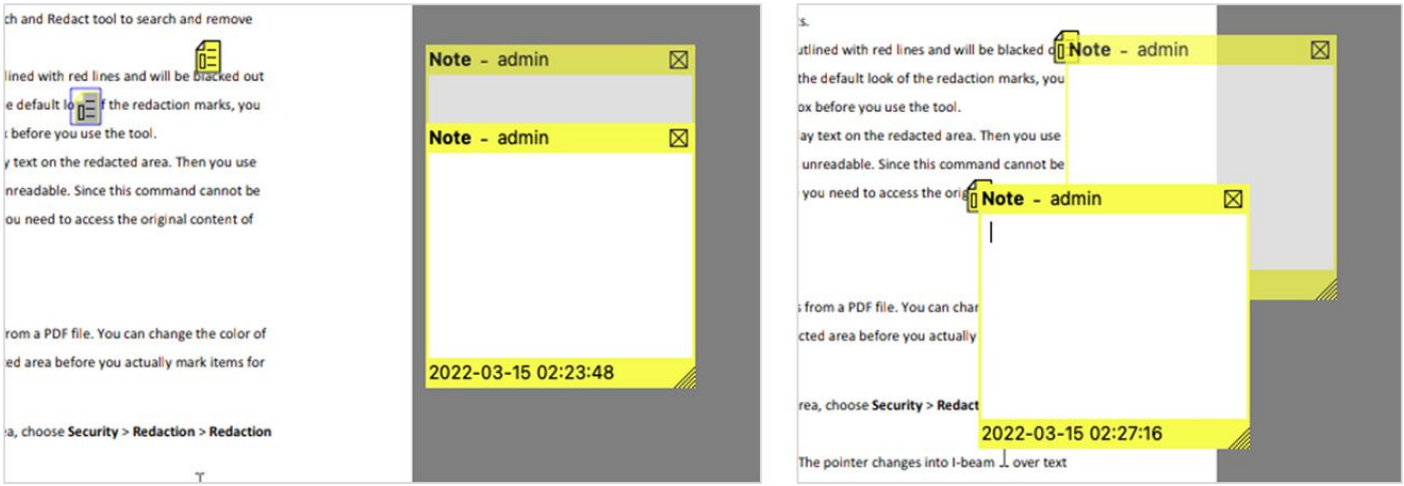
Under Comment, you can determine the default font and text alignment settings of text for text box.

- **Reset Comment Defaults:** Click to restore all comment default appearance settings to factory values. Restart is required.
- **Text Box Default Font:** Determine font name, font size, underline, and font color for Basic tools such as Typewriter, Text Box, and Callout. Changes to these settings apply to new comments only.
- **Text Box Default Align:** Specify the text aligning position for Basic tools such as Typewriter, Text box, and Callout text boxes. Changes to these settings apply to new comments only.

Commenting

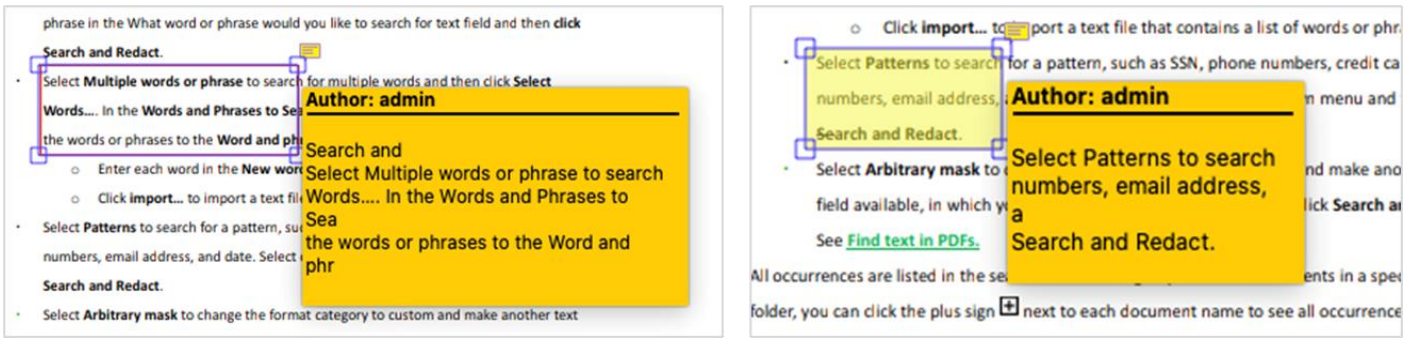
You determine the behaviors of pop-up notes and comments that appear therein. The checkboxes within the Making Comments area are explained below:

- **Always use Log-in Name for Author name:** If you select this box, the Login name (Right PDF > Preferences… > General > Identity > Login Name) becomes the author name in the pop-up notes.
- **Create new pop-ups aligned to the edge of the document:** Align new pop-up notes to the edge of the document pane. If deselected, pop-up notes appear right next to the annotation you make.



Aligning pop-up notes to the right edge of the document pane (Left).
With the option deselected, the note appears right next to the note icon (Right).

- **Copy encircled text into Drawing comment pop-ups:** The text within the area created by Draw Tools such as Oval, Rectangle, Polygon, or Cloud, is automatically copied to the associated pop-up notes. This does not apply to tools that cannot create an area, such as pencil, line, or arrow.
- **Copy selected text into Highlight, Cross-out, and Underline comment pop-ups:** the text selected by Highlight, Cross-out, or Underline tool, is automatically copied to their pop-up notes.



The text within the area created by Draw Tools is copied and pasted into the pop-up notes (Left). The text highlighted with text markup tool is copied and pasted into the pop-up note (Right).

- **Automatically open comment pop-ups:** Pop-up notes appear immediately when comments are created with draw tools or text markup tools; otherwise, you need to double-click to open them.
- **Enable text indicators and tooltips:** When the cursor hovers over a comment, show markup tool-tips and text indicators. If you think the indicators are interfering with your reading, uncheck it.

Notes

Add notes as annotations

The most common type of comment is Note, which lets you direct the attention of readers to a specific area of page. For instance, you can add a note anywhere on the page and type text in the associated pop-up note for other reviewers to see.

1. Open a PDF and choose Comment > Note .
2. Click on the page where you want to place the sticky note, and enter text in the comment box that appears. You can also change the text formatting in the **Popup** panel to the right.
3. To show or hide the pop-up note:
    - **To hide a pop-up note:** Click on the exit icon in the top-right corner of the pop-up note to hide it. Or right-click on the note and choose Minimize Pop-Up Note from the options.
    - **To show a pop-up note:** Double-click the sticky note to show it. Or right-click on the sticky note and choose Open Pop-Up Note from the options.

Note: right-click on any of the existing comments and select Open All Pop-Ups/Minimize All Pop-Ups from the options to show or hide pop-up notes of all comments instantly.

To edit note properties

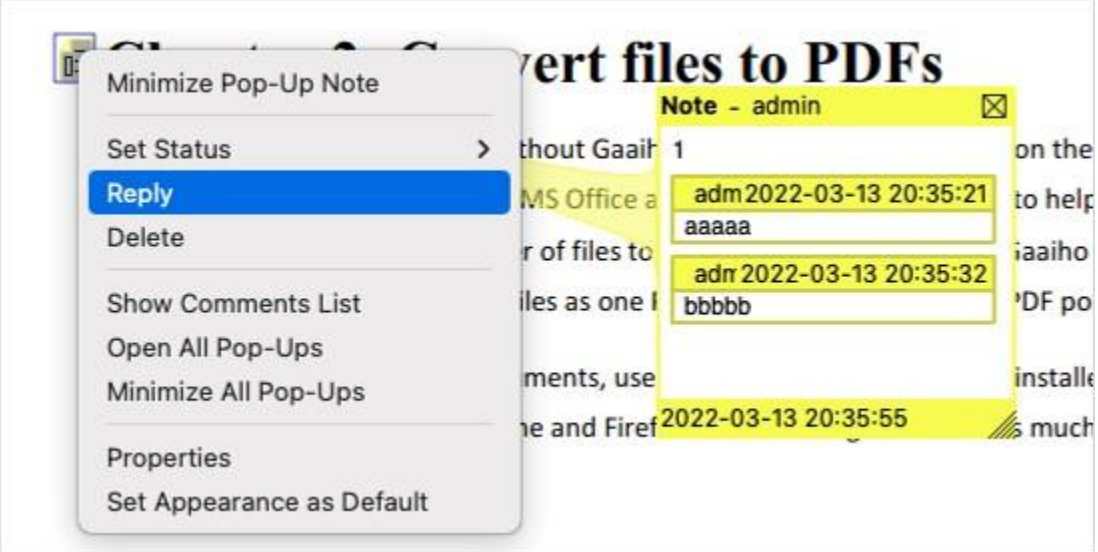
1. Right-click on the sticky note and select Properties....

2. On the Display tab of the Note Properties dialog box, edit the visual characteristics of the note, such as Icon, Color, and Opacity.
3. On the Author and Subject tab, you can edit the Author and Subject details for the note.
4. On the History tab, you can view all changes made to the comment.

Note: you are able to click-drag the sticky note icon and move it anywhere on the page of the document.

To reply to a note

1. If the pop-up note is hidden, double-click the note icon to make it appear.
2. Right-click on the pop-up note and select Reply from the menu options.
3. An additional pop-up note appears inside the original one. You can then write your response in it.



Comment with basic commenting tools

Typewriter, Text Box and Callout tools let you add text comments anywhere on the page.

- You can use the Text Box tool to type text in a box that is movable and resizable. Unlike a pop-up note, it always remains visible on the document.

- You can use the Typewriter tool to add additional text directly on the page. Different from Text Box, the Typewriter box is hidden after you finish typing.
- The Callout tool serves to create a callout box with an arrow pointing to a particular spot on the page. The callout box expands vertically as you type so that all text remains visible. It can be useful especially when you want to associate a comment with a related section of text or image.

To comment with typewriter, text box or callout

1. Open a PDF and choose Comment > Typewriter, Text Box, or Callout.
2. Click on the page where you want the box to appear. Then you can type text in it.



Examples of adding notes with Typewriter (A) Text Box (B) and Callout (C)

To edit properties

1. Right-click on the box with the Select tool and select Properties....
2. In the Typewriter/Text Box/Callout Properties dialog box, do the following if needed:
    - On the Display tab, edit the appearance of the box, such as Color, Opacity, Thickness and more. (Note: Typewriter does not have this tab.
    - On the Author and Subject tab, you can edit Author and Subject details.
    - On the History tab, you can view all changes made to the box.

To move or resize a text box

- **To move**: click inside a text box and drag to move it anywhere on the page.
- **To resize**: click-drag its selection handles to resize it.

Add a stamp to a PDF

Stamps work much like applying a static rubber stamp to a paper document. The extra merit is that you can use Dynamic stamps to indicate the name, date, and time information on the stamp without having to create multiple static stamps for your purposes. You can choose one from a list of predefined stamps on the Stamps panel or create your own stamps from an image or a template.

Open the Stamps panel

1. Do either of the following:
    - Choose Comment > Stamp.
    - On the Sidebar Navigation pane, click on the Stamps icon to open the Stamps panel.
2. The Stamps panel displays all preset stamps. Click Collapse All to display only the names of categories. To show all stamps, click Expand All.

To apply a stamp to a PDF

By default, predefined Stamps are categorized into three groups - Dynamic, Legal, and Standard.

1. In the Stamps panel, choose a stamp category and then select a stamp.
2. To place the stamp on the page: Click anywhere on the document page where you want to place the stamp. Or click-drag a rectangle to define the size and placement of the stamp.
3. If you have not set up your identity information yet (Right PDF > Preferences… > General > Identity), the Identity Setup dialog box will prompt you to enter the identity information that will appear on your digital identity stamps. Click Complete.

To edit Stamp properties

1. Right-click on the stamp using the Hand tool or Select tool, and select Properties....
2. In the Stamp Properties dialog box, do any of the following as needed:
    - On the Display tab, determine the Color of stamp pop-up notes and Opacity of stamps.
    - On the Author and Subject tab, you can edit the Author and Subject details.
    - On the History tab, you can view all changes made to the stamp.

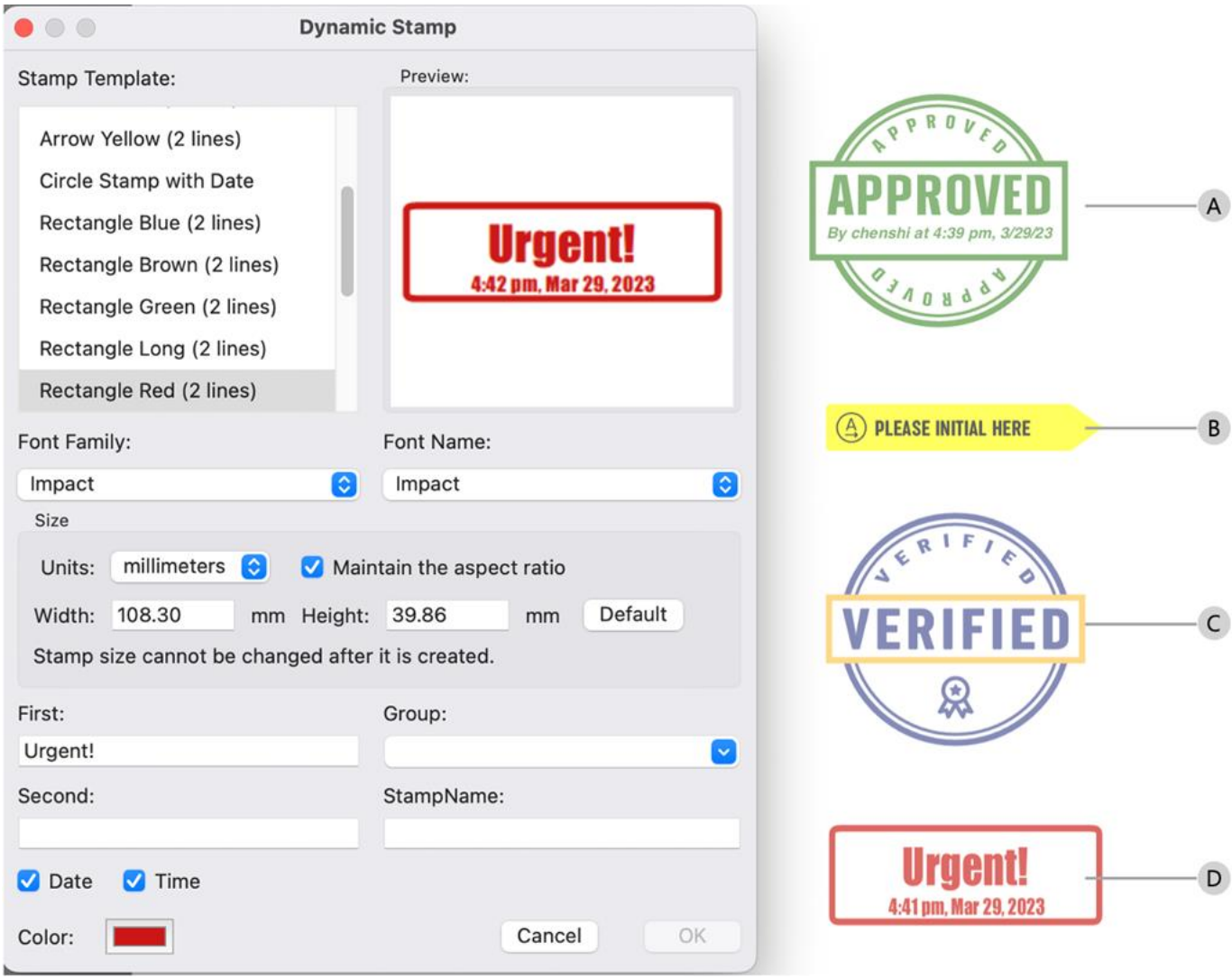
To move, resize and rotate a stamp

- Using the Hand tool or Select tool, click-drag to move it anywhere on the page.
- Using the Hand tool or Select tool, click on it and drag selection handles to resize.
- Using the Hand tool or Select tool, click on it and a blue box appears around the shape. Hover your cursor over the rotate icon and drag it in clockwise or counterclockwise direction.

To create a custom stamp

You can create two types of custom stamps, from an image or a template.

1. Choose Comment > Stamps.
2. Click the Create button at the top of the Stamps panel.
3. There are two ways to create a stamp:
    - **Select Create From an Image...**. Choose a file and determine its Group by either choosing one from the Group options (Dynamic, Legal, or Standard) or typing in a name to create a new group. Then decide its Stamp Name and click OK. To remove background of the selected image, click Apply Transparency and click on the image.
    - **Select Create Custom Dynamic Stamp...**. Select a Stamp Template and specify its Group, Stamp Name, text to display, and Color. Click OK.
4. The newly-created custom stamp appears in the specified group in the Stamps panel.
5. Select the stamp and click on the page or drag a rectangle at where you want to place it.



Set up a dynamic stamp in the Dynamic Stamp dialog box (Left). Insert types of stamps in a page for various purposes (Right): A. Dynamic stamp B. Legal stamp C. Standard stamp D. Custom Dynamic stamp

Annotate with text markup tools

Text markup tools let you indicate the text that needs more attention without changing the actual text in PDF. You can use Text markup tools to mark up the text that you want to delete, insert, replace, or highlight during document collaboration.

To mark up text

1. Open a PDF and choose Comment, and then select one of the text markup tools.
2. Ways to mark up text very depending on the tool you use.
    - **Highlight.** Click the text and drag to mark. Release the mouse to finish.
    - **Highlight Area.** Click-drag to define the size and location of an area. Release the mouse to finish.
    - **Cross-out**. Click the text and drag to mark. Release the mouse to finish.
    - **Underline.** Click the text and drag to mark. Release the mouse to finish.
    - **Insert Text.** Click anywhere on the page to add text.
    - **Replace Text.** Click the text and drag to mark. Release the mouse to finish.
3. Double-click the text markup to call out its pop-up note in which you can type a message as feedback or comment. Pop-up notes of the markups created by Insert Text or Replace Text will show automatically without requiring a click.

To delete text markup

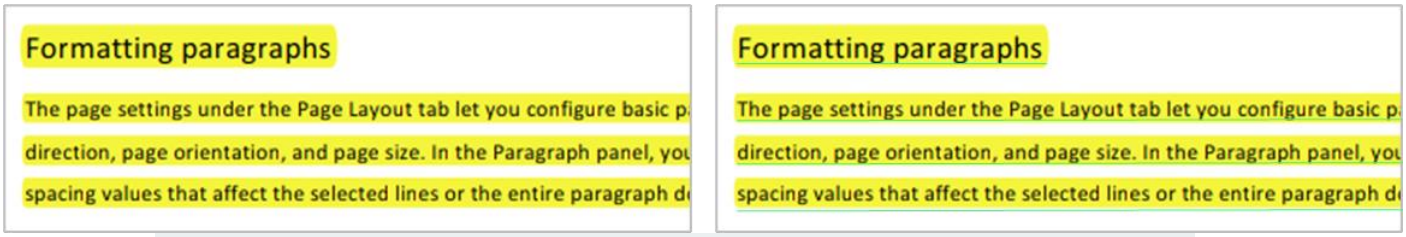
Do one of the following:

- Right-click on the marked text with Hand tool and select Delete.
- Right-click on the marked text with Select tool and select Edit > Delete.
- Click with either the Hand tool or the Select tool and press Delete on the keyboard.

To edit text markup properties

1. Select either the Hand tool or the Select tool. Click on the markup to have it highlighted with a blue frame. Right-click on the markup and select Properties....
2. In the text markup Properties dialog box, do any of the following as needed:
    - On the Display tab, edit visual characteristics of the selected text markup.
    - On the Author and Subject tab, you can edit the Author and Subject details.
    - On the History tab, you can view all changes made to the text markup.

Note: you can apply more than one markup on the same text, meaning the text can also be underlined and highlighted.



Highlighted text (Left); Text that is both highlighted and underlined (Right)

Mark up with draw tools

Draw Tools (Line, Arrow, Oval, Rectangle, Polygon, Cloud, Polygon Line, Pencil, Eraser, and Hammer) can be used to provide feedback or comments during document review. Similar to editing visual characteristics of basic comment tools, it is easy to change the appearance of the drawings, such as Note, Typewriter, Text Box, Callout, and Stamps.

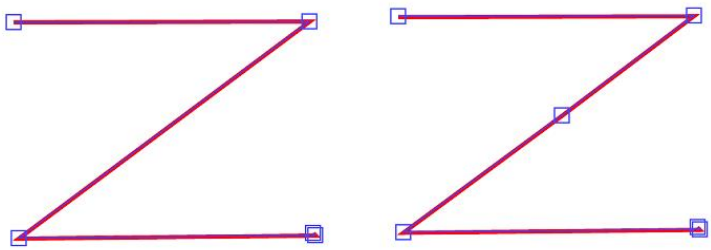
To add a drawing markup

- **Add a line or arrow**
    1. Open a PDF file and choose Comment > Draw Tool > Line/Arrow.
    2. Click on the page and drag to define its length and placement.
- **Add an oval or rectangle**
    1. Open a PDF file and choose Comment > Draw Tool > Oval/Rectangle.
    2. Do either of the following:
        - Click on the page where you want to place the drawing markup.
        - Click and drag to define the size and placement of the oval/a rectangle.
- **Add other shapes**
    1. Open a PDF file and choose Comment > Draw Tool > Polygon/Cloud/Polygon Line.
    2. Click on a page, move the cursor and click again to create a line. Repeat it to create an open shape that comprises line segments.
    3. To complete drawing, double-click or right-click and choose Complete.
- **Add a free-form drawing**

1. Open a PDF file and choose Comment > Draw Tool > Pencil.
2. Click-drag the pointer on the page to draw.
3. To remove marks created by the Pencil tool, please select Eraser and move the cursor back and forth to erase them.
4. Double-click on the free-form drawing using Hand tool to call out its pop-up note.

Note:

- The Erase tool can only be used to erase pencil drawings. Other drawing markups cannot be wiped out by the Erase tool.
- The Hammer tool "hammers" only polygons and polygon lines, making curves and zigzags straight. It can also add a vertex to a straight line that you can drag to determine its angle.



Using the Hammer tool to break off a line (Right)

To move a drawing markup

- Using either Hand tool or Select tool:
- Click anywhere inside the drawing markup you want to move and drag it to anywhere on the page.

To edit properties of a drawing markup

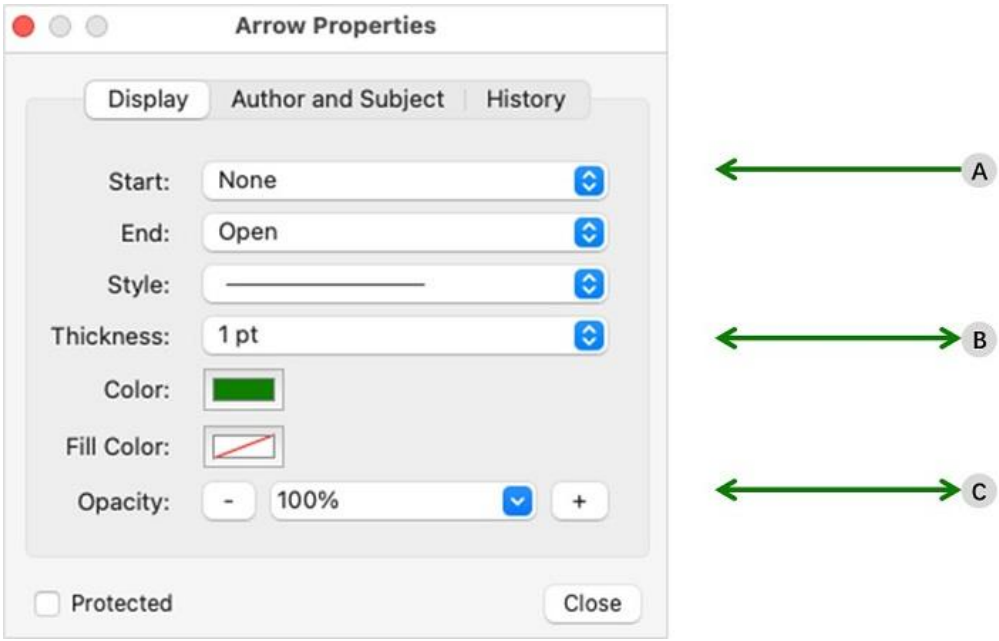
1. Using either the Hand tool or the Select tool, right-click on a drawing markup and select Properties....
2. In the drawing tool Properties dialog box, do any of the following as needed:

- On the Display tab, edit visual characteristics of the selected drawing markup.
- On the Author and Subject tab, you can edit Author and Subject details.
- On the History tab, you can view all changes made to the drawing markup.

Edit the appearance of a Line drawing markup

You can convert a straight line drawing into an arrow by editing Line properties.

1. Using either the Hand tool or the Select tool, right-click on a straight line drawing and select Properties....
2. On the Display tab of the Line Properties dialog box, do any of the following: Click the Start drop-down menu. If you select Open, the straight line changes into an arrow drawing. There are more options available listed in the Start menu to choose from. Or click the End drop-down menu. You can decide the look of the end point of the selected line.



Various Line drawing markups by editing Line properties:

A. *Single arrow line markup* ***B.*** *Double arrow line markup* ***C.*** *Straight line markup*

To delete a drawing markup

Do one of the following:

- Right-click on it with the Hand tool and select Delete.
- Right-click on it with the Select tool and select Edit > Delete.
- Click with the Hand tool or the Select tool and press Delete on the keyboard.

Attach files as annotations

The File Attachment feature lets you place reference files or lengthy text that doesn't cope well with pop-up notes into your PDF documents. Reviewers can double-click the attachment icon to open the file.

To attach a file

1. Open a PDF in which you want to add a file attachment and choose Comment > File Attachment.
2. Click on the page where you want to attach a file.
3. In the Open dialog box, choose a file you want to attach, select it, and click Open. The file attachment icon appears on the page.
4. In Attach File Tool pane, you can set the appearance of the attachment.
5. Double-click on it to open; or right-click on it and select Open.

Note:

1. To view an attachment file, you must have the application installed on your computer that can open the file.
2. Files attached via Document > Attachments will not be shown in the Comments panel.

To edit properties of a file attachment

1. Using either the Hand tool or the Select tool, right-click on the file attachment icon and select Properties....

2. In the File Attachment Properties dialog box, do any of the following as needed:
    - On the Display tab, set up the appearance of the file attachment icon.
    - On the Author and Subject tab, you can edit the Author and Subject details and add description to the attachment. The description is displayed on the corresponding File Attachment column in the Comment panel.
    - On the History tab, you can view all changes made to the file attachment.

To open and save a file attachment

- To open a file attachment, directly double-click the file attachment icon to open it. Or, right-click on the file attachment icon and select Open from the options.
- To save a file attachment, choose File > Save As and specify a location to save it. The embedded file attachment is saved along with the PDF file. Note: the attached files are embedded in the PDF and always saved with the PDF they are attached to.

Add an audio comment

Using Attach a Sound, you can add a prerecorded WAV file or record one yourself. The audio attachment appears in the Comments panel and you can further edit properties of the sound attachment icon and view the history of changes.

To add a prerecorded audio comment

1. Choose Comment > Attach a Sound.
2. Click on the page where you want to place an audio comment.
3. In the Attach Sound dialog box, click the Browse... button and select the audio file you want to add. Click Open.
4. The sound attachment icon appears on the page and you can then right-click to edit its visual characteristics.

To record an audio comment and place it in a PDF

1. Choose Comment > Attach a Sound.
2. Click on the page where you want to place an audio comment and the Attach Sound dialog box appears.
3. In the dialog box, click the Record button and speak into the microphone. Note that this button appears only when your computer has supported hardware for recording purpose.
4. When you are done with recording, click the Stop button to finish. Click OK.
5. You can then click the Play button to play the file.

To edit properties of an audio attachment

1. Using either the Hand tool or the Select tool, right-click on the sound attachment icon and select Properties....
2. In the Sound Attachment Properties dialog box, do any of the following as needed:
    - On the Display tab, set up the appearance of the sound attachment icon.
    - On the Author and Subject tab, you can edit the Author and Subject details and add description to the attachment. The description appears on the corresponding Sound Attachment column in the Comments panel.
    - On the History tab, you can view all changes made to the sound attachment.

Sharing PDFs and collaborating

Sharing PDFs

Right PDF (macOS) lets you share the entire document or just a part of it by email or by supported cloud add-ins.

Sharing PDFs by email

You can share the whole document or just a part of it using your email application.

1. Open a PDF file and do either of the following:
    - Choose **Home** > **Email** .
    - Choose **File** > **Share** > **Mail as Document / Mail as Flatten**.
2. In the **Share** dialog box, select the Whole Document, Current Page, a range of pages, or selected pages. Enter a value if necessary. Click **OK**.
3. In the Send Email dialog box, select the email client application you want to use, and click OK. You can also select **Remember my choice** so that you don't need to do it again next time you want to share a PDF by email.
4. After email client application is launched, the PDF file you want to send is enclosed as an email attachment with the file name automatically set as the email subject.
5. Edit email content and enter email addresses for recipients as needed. Click **Send**.

Sharing PDFs by Evernote

You can use Evernote add-in to upload the document quickly. Please note you need to install the application before using its add-in.

1. Open a PDF and choose **Home tab**.
2. Click **Send to Evernote** .

Collaborate on a PDF file

Collaboration empowers you to invite partners within the same LAN or on the internet to co-edit the same document concurrently. Other features include inviting/removing partners, setting up access code and using Secure Mode to ensure security.

Meeting Types

Right PDF offers two ways to collaborate: LAN and online.

LAN collaboration: No server needed. Only Right PDF (macOS) users in the same LAN can join.

Online collaboration: A server is required. Go to Preferences > Collaboration > Online Collaboration and specify a server URL.

Both have the same functionality, and the only difference is the type of network which determines who can join the meeting (LAN or Internet). However, you won't be able to use the following features:

- Texting editing
- Convert to Writable
- Batch numbering
- Modify security settings
- Handwritten signature
- Sign & certify
- Protect
- Secure delivery
- Microsoft AIP
- Batch processing

Participants can do the following during the meeting:

- **Follow View:** In the floating Collaboration toolbar in the upper right corner of the Document pane, click **Follow Another User** icon and choose one from the drop-down menu to track their activity. In this mode, you cannot edit the document, and the document pane will act like a real-

time monitor of actions such as editing and scrolling. Click the **Stop Following View** icon on the floating toolbar (with the name of “Following XXX’s Current View”) at the top of the document pane to exit and return to co-editing mode.

- **Show User As:** In the floating Collaboration toolbar in the upper right corner of the Document pane, click **Show User As** icon, and choose a way to track what each reviewer is doing on the document from the drop-down menu.

    - **Current Tool and ID:** Show pointers marked with icons of the tools the reviewers are using along with their nicknames.
    - **Laser Pointer and ID:** Show pointers of little arrows marked with nicknames.
    - **Do Not Show:** No user activity is shown.

- **Exit:** Click the Exit icon on the Collaboration toolbar, or right-click on the nickname in the menu and choose Exit to close the meeting. Upon receiving confirmation, all reviewers can save the document. Only when the host has chosen the Normal security option can all other reviewers save the document.
- **Add** (available to the host of LAN collaboration only)**:** Click the Add icon on the Collaboration toolbar, or right-click on the nickname in the menu and choose Add to invite new reviewers to the meeting.
- **Remove** (available to the host only)**:** Choose a nickname from the list in Collaboration pane, and click the Remove icon to the right, or choose Remove from the context menu.

Host LAN collaboration

1. Open Right PDF and choose **Advanced > Collaboration** .
2. In the pop-up **Right PDF** dialog box, set a nickname to let others identify you and click **OK**. To change the name, click the **Rename Nickname** button and type in a new name. Click **OK**.
3. Under the **LAN Collaboration** tab , check **Visible to users in the same LAN** to let other users of Right PDF (macOS) discover you, and click the **Start Collaboration**.
4. In the **LAN Collaboration** dialog box, select reviewers by doing either of the following:
    - Select individual reviewers you want to work with.
    - Using **Select All** or **Unselect All**.

5. To ensure document security, click the **Security Setup >>>** button and select the options:
    - Set up a join password: **Security Setup** > **Access Code**.
    - Select either Normal or Secure mode for the collaboration: **Security Setup** > **Security Option** > **Normal**/**Secure** Mode.
6. Click **Start**.

Join LAN collaboration

1. Open Right PDF and choose **Advanced** > **Collaboration** .
2. In the pop-up **Right PDF** dialog box, set a nickname to let others identify you and click **OK**. To change the name, click the **Rename Nickname** button and type in a new name. Click **OK**.
3. Under the **LAN Collaboration** tab , check **Visible to users in the same LAN** to let other users of Right PDF (macOS) discover you and invite you to a collaboration meeting.
4. Reviewers will see a confirmation dialog box when the meeting starts. Click OK to open the document. Enter the password in the popup dialog box if the host requires an access code for entry.

Host Online collaboration

1. Open Right PDF and choose **Advanced** > **Collaboration** .
2. In the pop-up **Right PDF** dialog box, set a nickname to let others identify you and click **OK**. To change the name, click the **Rename Nickname** button and type in a new name. Click **OK**.
3. Under the **Online Collaboration** tab , choose **Start Collaboration** and Collaboration Setup dialog box shows.
4. Choose a security option and click OK.

    - **Normal:** Allow other reviewers to save the co-edited document at the end of session.
    - **Secure:** Other reviewers cannot save the co-edited document at the end of session. The document will be deleted when you quit the meeting or the meeting ends.

5. When processing is complete, Collaboration Setup dialog box will show a unique ID. Click **Copy** to copy it to clipboard and forward the collaboration ID to other reviewers
6. Click Start.

Join Online collaboration

Before using online collaboration, enter the URL of the collaboration server in Preferences > Collaboration > Online Collaboration field.

1. Open Right PDF and choose **Advanced > Collaboration**  .
2. In the pop-up **Right PDF** dialog box, set a nickname to let others identify you and click **OK**. To change the name, click the **Rename Nickname** button  and type in a new name. Click **OK**.
3. In the **Online Collaboration** tab  , select **Join Collaboration** to show a dialog box. Enter the ID you get from the host and click **Join**.

Managing comments

View comments

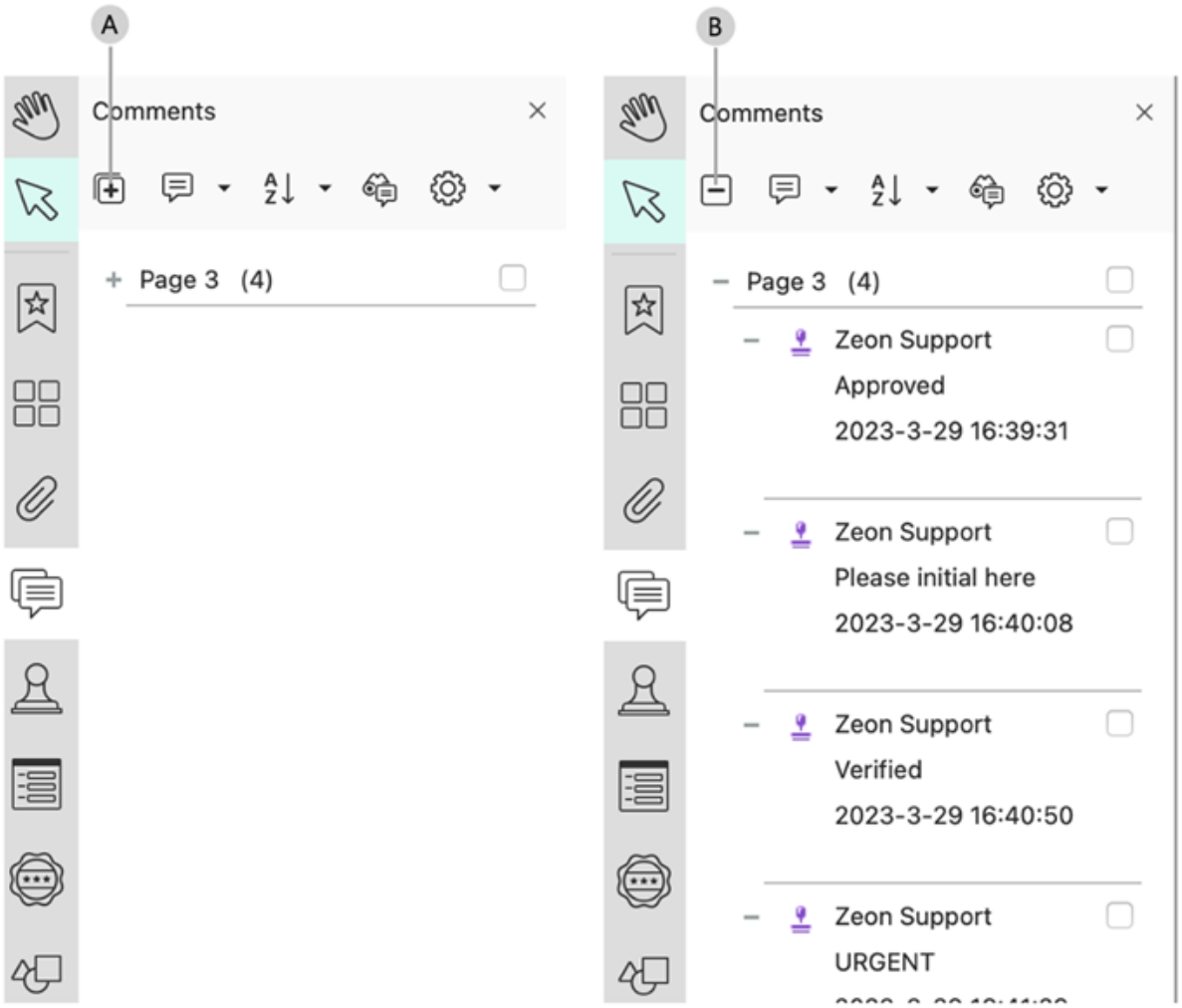
You can view all the comments added to the PDF document in the Comments panel that provides a toolbar with commonly used options, such as searching, sorting, filtering, and more.

To open the Comment panel

1. On the Sidebar Navigation pane, click on the Comment icon.
2. You can then use the options at the top of the Comment panel to work with comments, such as adjusting comment viewings, deleting, filtering, sorting, searching, and more.

To expand or collapse comments

1. On the Sidebar Navigation pane, click on the Comment icon.
2. In the Comment panel, do any of the following to expand or collapse comments in panel:
    - To expand or collapse all comments, click the Expand all elements in panel (B) or the Collapse all elements in panel (A) button.
    - To expand or collapse individual comments, click the + or - button to the left of comment.



Comments are expanded already (Left) A. Collapse all; Click the Collapse all elements in panel button (B) to expand all comments. Comments are all collapsed (Right).

Sort comments

You can sort comments in the Comments panel by type, page, author, date, color, or checkmark status.

1. On the Sidebar Navigation pane, click on the Comment icon.
2. In the Comment toolbar, click the Change how comments are sorted button and choose an option from the drop-down menu.

Filter the displayed comments

Filter the displayed comments lets you hide or show comments based on type, reviewer, status, or checked state. Filtering affects both the comments in the document window and in the comment panel. For example, if you select Hide all comment, all the comments in the document and Comment panel will be hidden.

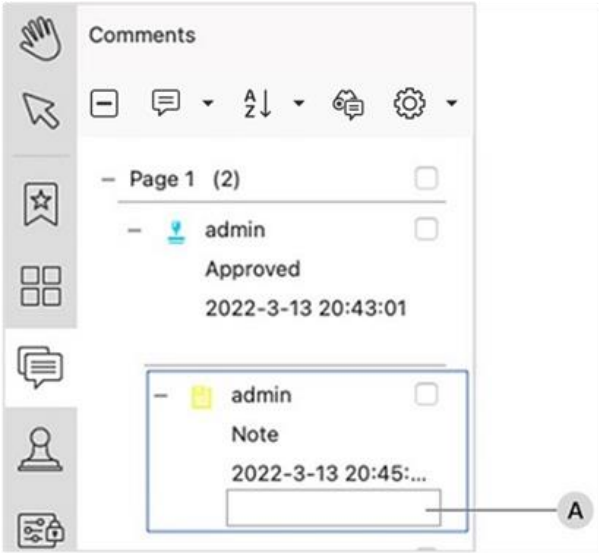
1. On the Sidebar Navigation pane, click on the Comment icon.
2. In the Comment toolbar, click the Filter the displayed comments button and choose an option from the list:
    - To hide all comments, select Hide all Comments. All comments are invisible both in the document pane and in the Comment panel.
    - To show all hidden comments, select Show all Comments to have all comments visible in the document pane and in the Comment panel.
    - Choose a category from the drop-down menu to filter comments accordingly. For example, if you only want to see drawing markups that have been checked, choose Show by Types > Drawing Markups and then choose Show by Checked > Checked so that only checked drawing markups appear in the panel and document pane.

Reply to comments

Reply is especially useful in shared reviews, enabling participants to read each other's comments. Upon creation, replies appear directly in the pop-up notes and in the Comment panel. Replies are shown below the original comments. You can hover the cursor over a comment on the document page to see all replies under it. However, if you create any sub-reply (replying to an existing reply), the pop-up notes will only show the number of sub-replies under the parent reply, meaning you need to open the Comment Panel to see them all. Sub-replies also cannot be edited directly within the pop-up notes.

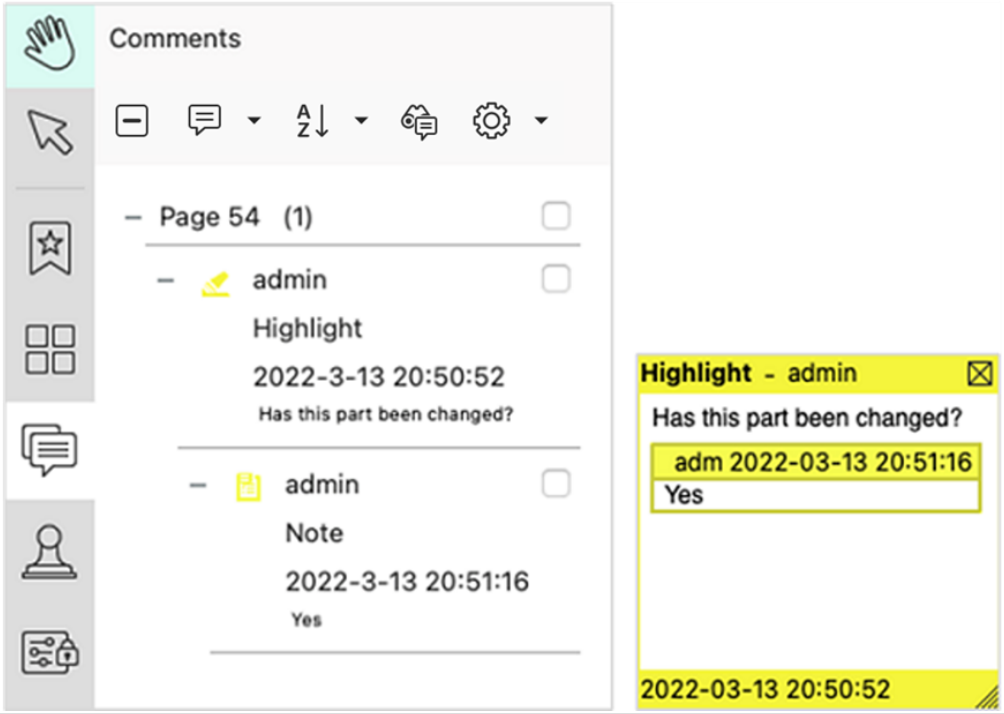
Reply in the comment list

1. On the Sidebar Navigation pane, click on the Comment icon.
2. Select a comment in the Comment panel. Right-click on it and select Reply from the pop-up menu.
3. Type you reply in the box (A) that appears below the comment.



Reply in the pop-up note

1. Open a PDF and double-click a comment to open its pop-up note.
2. Right-click on the pop-up note and select Reply from the pop-up menu.
3. Type your reply in the box that appears below the comment.



Replies appear right below the comment, both in the pop-up note (Right) and in the Comment panel (Left).

Set a status or check mark

Statuses and checked marks indicate whether the comment has been read and whether it requires further action. By setting the review status, you can let other reviewers know how their purposed changes are being implemented. Once the review status is set, it is always visible in the Comment panel and cannot be removed from the Comment list even if you change the status to None. Note that Checked marks are "private"; they are invisible to others viewing the PDF document unless you change the comment statuses.

Open a PDF and do either of the following to set review status for a comment:

- In the document pane, right-click on a comment and choose Set Status > Review. Choose an option from the Review menu. For example, if you choose Set Status > Review > Accepted, the review state, Accepted, will appear below the comment along with the name of who set the review status and date.
- In the Comment panel, right-click on the comment and choose Set Status > Review. Choose an option from the Review menu.

Find a comment

The Search comments tool helps you locate a comment by searching for specific words or phrases in the Comments panel.

Search for single word or phrase

1. On the Sidebar Navigation pane, click on the Comment icon.
2. In the Comment toolbar, click Search comments and the Search dialog box appears.
3. In the Search For section, select Single word or phrase. Enter the word or phrase you want to search for in the What word or phrase would you like to search for text field and define search criteria by checking Match Case and/or Match whole word only.
4. Click Search Comments. The results show the comments that match the search criteria and the word or phrase you search for. The results are sorted by page. You can click on the result to go to the comment in the Comment panel.

Search for multiple words or phrases

1. On the Sidebar Navigation pane, click on the Comment icon.
2. In the Comment toolbar, click Search comments and the Search dialog box appears.
3. In the Search For section, select Multiple words or phrase and then click Select Words....
4. In the Words and Phrases to Search dialog box, type the word or phrase to search for in the New word or phrase text field and then click Add to add it to the Word and phrase list box below. You can repeat the step to add more. At the bottom there are checkboxes you can select to refine search results. Click OK to finish.
5. The results show the comments that match the search criteria and the words or phrases you search for. You can click on the result to go to the comment in the Comments panel.

Delete comments

You can delete any comments but those that are protected. To delete all comments in a PDF, use Inspect Document.

Delete a comment

Open a PDF in Right PDF and do one of the following:

- In a document, select the comment using either Hand or Select tool and press Delete on your keyboard or right-click on it and select Delete.
- In the Comments Panel, select the comments you want to delete and click Delete the selected comment or directly press Delete on your keyboard. You can also right-click on the comment in the document pane and select Delete.

Protect a comment

1. Open a PDF that contains comments or use comment tools to create one.
2. Right-click on the box with the Select tool and select Properties....
3. Select a comment, right-click on it and choose Properties... from the options. In the Properties dialog box, click the Display tab and check Protected. Click Close.
4. A lock icon then appears beside the icon of the protected comment in the Comment panel. To unlock a protected comment, right-click on the comment and choose Properties... from the options. Uncheck Protected and click Close.

Delete all comments

You can use Inspect Document to delete all comments in a PDF.

1. Open a PDF and choose **Security > Inspect Document**.
2. Select **Comments** in the dialog box and click **Remove**.
3. Click **OK** in the following prompt dialog.

Spell-check all text in comments

Check Spelling helps you spell-check the text you add in note comments and form fields.

1. Open a PDF file with comments or text fields.
2. Double-click a comment to show its pop-up note.
3. Right-click on a pop-up note/text field and select Check Spelling from the options.
4. In the Check Spelling dialog box, click the Start button.
5. The first misspelled word is highlighted and underlined in red. Do any of the following as needed:
    - Click Ignore to skip the mistake.
    - In the Suggestions box, choose a suggested correction and click Change to replace.
    - Click Change All to replace every instance in the note box/text field with the suggested correction.

Migrate comments

Using Migrate Comments, you can move comments from one file to another. It is especially useful when you want to compare a revised document to the original. Considered new to the target file, all migrated comments are automatically set as Not Confirmed.

To migrate comments

1. Open a PDF file you want comments to be migrated to.
2. On the Sidebar Navigation pane, choose Options > Migrate Comments.
3. In the Migrate Comments dialog box, select the source file with comments from the From drop-down menu. You can choose to migrate from a currently open PDF document or select Open a File to Migrate and choose another file.
4. Click OK.

To set migration status for a comment

1. You can set migration status for a comment.

2. Do either of the following to set migration status:
    - Directly select a comment in the document. Right-click on it and choose Set Status > Migration > None/Confirmed/Not Confirmed.
    - In the Comment panel, select a comment from the Comment list. Right-click on it and choose Set Status > Migration > None/Confirmed/Not Confirmed.

Exporting and importing comments

By exporting and importing comments, you can merge comments from multiple files into a single PDF file for easier review. You can export all comments from a PDF file and then import them into a different file or another version of the same document.

To export comments

You may want to export comments and send them to someone, or need to import comments you receive. As you export comments, you create a XFDF file that contains comments. Then you can import those comments from the XFDF file into the original PDF file.

1. In the Comment panel, click Options and choose Export Comments... from the options.
2. In the Export Comments dialog box, name the XFDF file (.xfdf), decide a place to save it, and click Save.
3. You can then import the comments from the XFDF file to another version of the PDF file.

To import comments

1. In the Comment panel, click Options and choose Import Comments... from the options.
2. In the Import Comments dialog box, select a XFDF file and click Open.
3. The comment positioning is the same as that of the file they are imported from. If comments appear to be out of place, the source and recipient PDF file might be different. For instance, if you import comments from a ten-page document into a two-page document, only comments from the first two pages will appear.

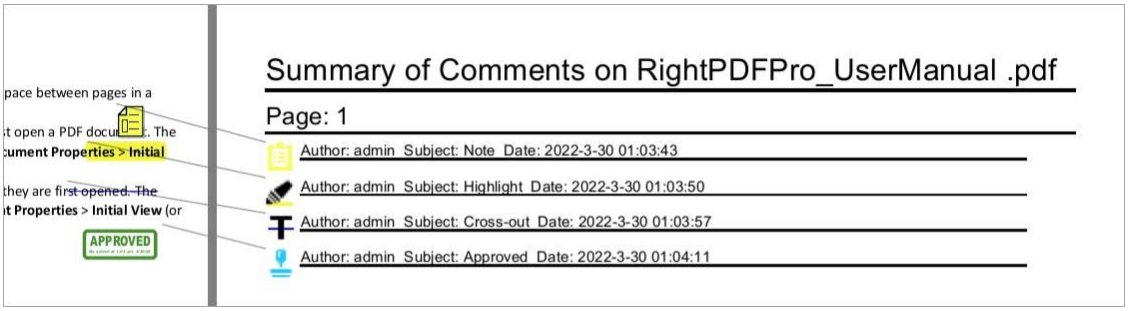
Create a comment summary

Create Comment Summary generates a synopsis of all the comments associated with a PDF. You can choose to directly print the comment summary or create a PDF version of it.

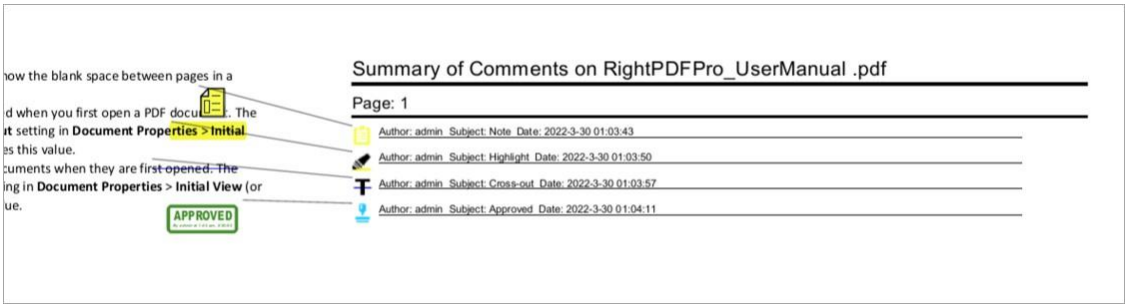
1. Open a PDF file with comments.
2. On the Sidebar Navigation pane, choose Options > Comment Summary....
3. In the Summarize Comments dialog box, do the following:
    - Choose a layout for the document and comments.
    - Choose a page size and font size.
    - Specify a comment type, like whether to include all comments in the summary or just the comments currently shown in the Comment panel
    - Choose how to sort the comments, such as by page, author, date or type.
    - Specify a page range and decide whether to include pages with no comments.
4. Click OK. Or, click Print Comment Summary to print.

Page layout options for comment summary

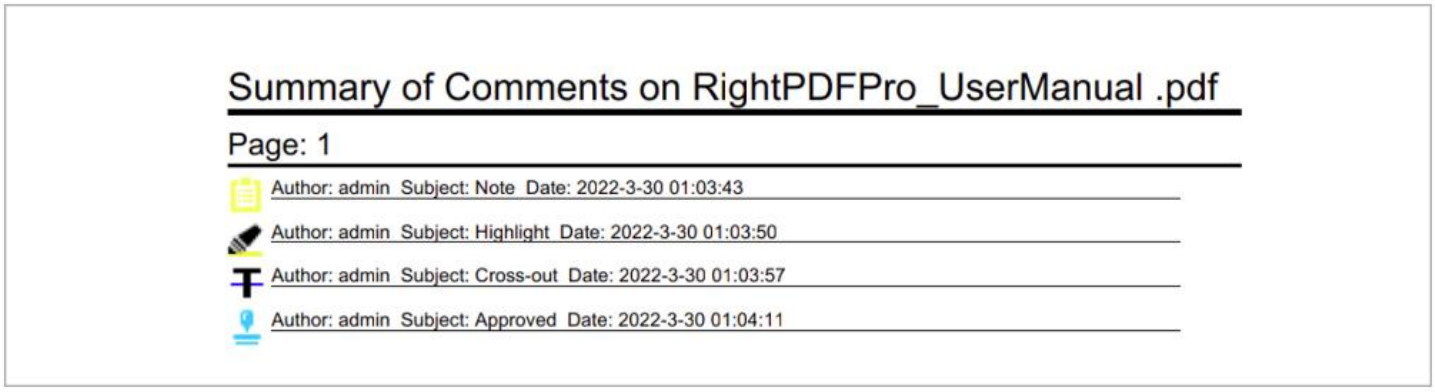
A. Document and comments with connector lines on separate pages



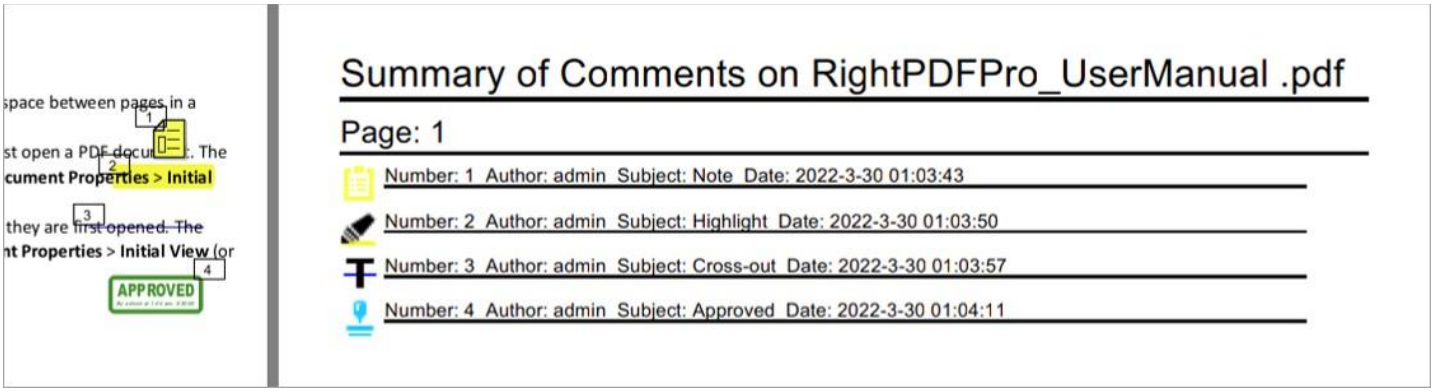
B. Document and comments with connector lines on single page



C. Comments only



D. Document and comments with sequence numbers on separate pages



Measure Distance, Perimeter, and Area

To use the measure tool

The Measure Tools help you easily figure out the distance, perimeter, and area of objects in the document, based on the scale you define.

To measure distance

1. Open a PDF file and choose Comment > Distance Tool.
2. Click where you want to begin measuring. You can press Esc on your keyboard to restart.
3. Move the cursor to the second point and click again to finalize the measurement. The measured distance is displayed on the PDF file.

To measure perimeter

1. Open a PDF file and choose Comment > Perimeter Tool.
2. Click anywhere on the page to set a start-point. You can press Esc on your keyboard to restart.
3. Move the cursor to the next segment of the perimeter and click to set a midpoint. You can set as many midpoints as needed.
4. Click the start-point, double-click the last point or right-click and choose Complete Measurement to finish measuring.

To measure area

1. Open a PDF file and choose Comment > Area Tool.

2. Click anywhere on the page to set a start-point. You can press Esc on your keyboard to restart.
3. Move the cursor to the next segment of the area and click to set a midpoint. You can set as many midpoints as you need.
4. Click the start-point, double-click the last point or right-click and choose Complete Measurement to finish measuring.

To edit properties of the measure tool

The view tab

- The Measurement section lets you know the distance between the start-point and the end-point and the angle. The perimeter and area measurement are active only when you are using Perimeter or Area tool.
- The Cursor Location section shows the X and Y coordinates of your cursor in relation to the start-point. Your start-point is set as X=0, Y=0.

The settings tab

- **Perpendicular Measurement.** Check to set measurement lines always at right angles.
- **Caption Style (Distance tool only).** Specify whether the distance measurement caption is placed Inside or on Top of the measurement line.
- **Units Settings.** Set to change the scaling ratio and unit of measurement on the drawing areas. Enter the scale ratio in the Ratio text field.
- **Snap Settings.** Check Snap to 2D to have the measurement points snap to points, edges, or arcs in the document.
    - Check Snap to Path to enable snapping the measurement to the end of a line.
    - Check Snap to Path Endpoints to snap the measurement to the endpoint of a line.
    - Change Snap color to decide the color of the square that appears when you move the pointer to a line.
    - Set Sensitivity to define how close the pointer must be to the items being snapped to.

The markup tab

- **Use Markup.** It turns measurements into comments. The text you enter in the Use Markup text field will become note comments in the Measurement pop-up notes and also in the Comment panel.
- **Measuring Color.** Set the color of the measurement lines.
- **Set Length as Default (Distance Tool only).** If selected, you don't have to manually move the cursor to determine the leader length each time you make a distance measurement.
- **Length (Distance Tool only).** It specifies the length of the line leader that appears on one side of the measurement points.
- **Extension (Distance Tool only).** It specifies the length of the leader extension that appears above the measurement line.
- **Offset (Distance Tool only).** It specifies the amount of blank space that appears between the measurement points and the leader.

Chapter 7: Document Assembly

Manipulating, splitting and renumbering PDF pages

Rotate a page

Manipulating pages in a PDF shares the same permission as editing document. If it's a protected PDF (identifiable by a lock icon next to the file name), go to Document Properties under the Security tab, and check the permissions listed in the Summary of Permitted Actions area. Make sure that you are allowed to make changes to the PDF document.

Rotate a page

You can rotate all pages, the current page, or selected pages of a PDF clockwise 90 degrees, counterclockwise 90 degrees, or 180 degrees. The Rotate tool can be found on the Ribbon toolbar or in the Page Thumbnails panel.

1. Open a PDF file and do either of the following to use the Rotate tool:
    - Choose Document > Rotate.
    - On the Sidebar Navigation pane, click the Page thumbnails icon to open the panel. In the Page Thumbnails toolbar, click Pages Panel Option and select Rotate....
2. In the Rotate Pages dialog box, follow the steps to set Rotate Pages properties:
    - For rotation angle, select the increment and direction of the rotations from the Rotate Angle drop-down menu: Clockwise 90 Degrees, Counterclockwise 90 Degrees, or 180 Degrees.
    - For Page Range, select to apply rotation on all pages, the current page, a ranged of pages, or a selection of pages.
    - From the Rotate drop-down menu, specify Odd pages, Even pages, or both. You can also choose Landscape Pages, Portrait Pages or Pages of Any Orientation as needed.

Extract pages in a PDF

You can extract a range of pages or selected pages from a PDF file and create a new document that contains not only the text content but also all form fields, comments, and links to other files and websites. Depending on what you need, you can choose to leave the extracted pages in the original document or remove them during the extraction process. You can also make extracted pages separate documents.

1. Open the PDF file and choose any of the following:
    - Choose Document > Extract.
    - On the sidebar navigation pane, click the Page Thumbnails icon to open the panel. Then click the Pages Panel Option icon and choose Extract….
2. In the Extract Pages dialog box, specify the range of pages to extract.
    - Check either or both of the following options:
    - Delete After Extraction. Remove extracted pages from the original document after extraction.
    - Extract Pages As Separate Files. Create a single-page PDF for each extracted page. To create a multipage PDF document with all extracted pages in it, leave this option unchecked.
3. And click OK.

Replace pages

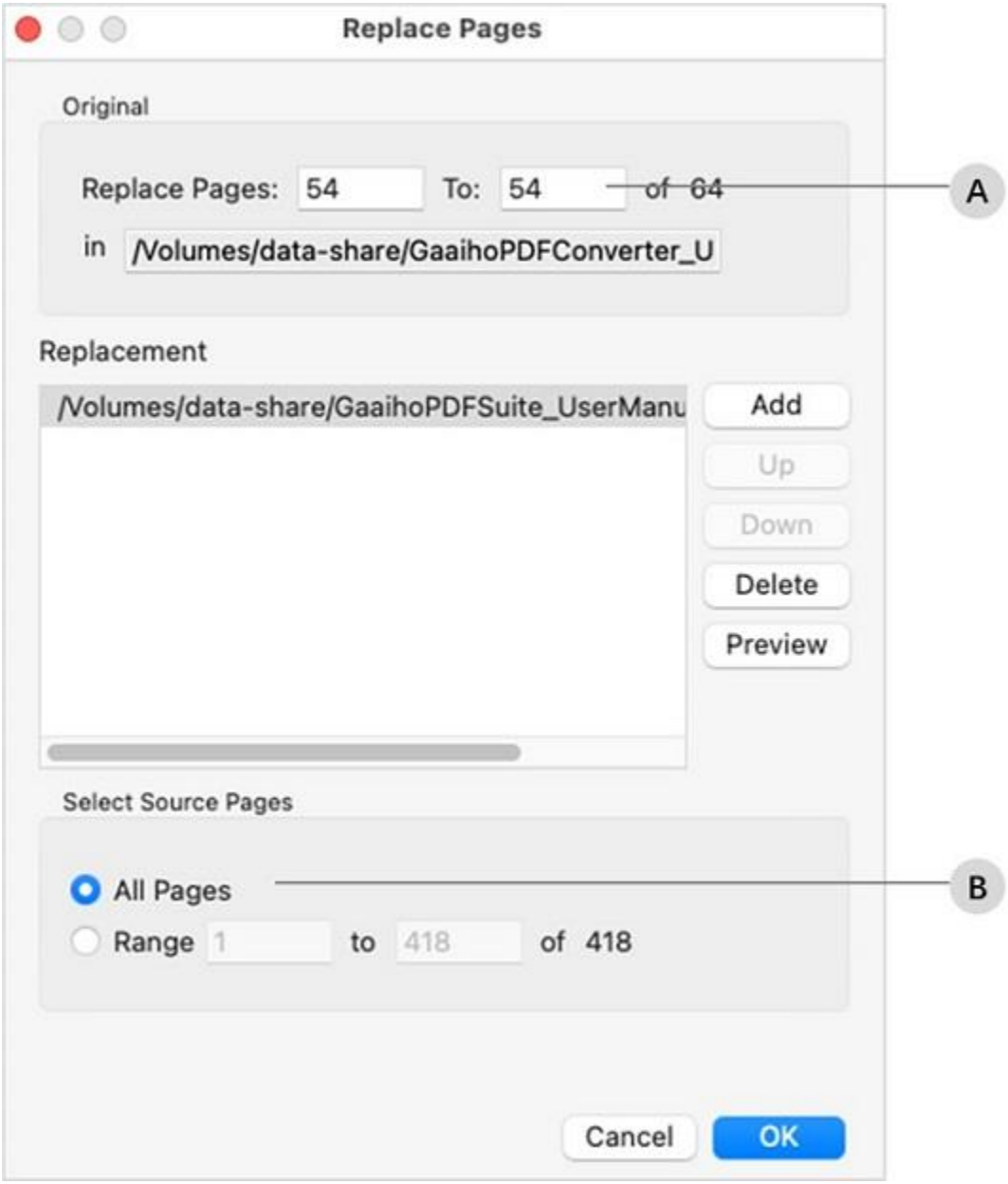
You can replace one or more pages in the document with a selection of pages from another document. Text, images, links, and comments on the original pages are all replaced, whereas bookmarks and interactive elements associated with the original pages are not affected.

1. Open the PDF file and choose any of the following:

    - Choose Document > Replace.
    - On the sidebar navigation pane, click the Page Thumbnails icon to open the panel. Then click the Pages Panel Option icon and choose Replace….

2. In the Open dialog, select the document containing the replacement pages and click Open.

3. In the Original section of the Replace Page dialog box, enter the pages to be replaced in the original document.
4. In the Select Source Pages section, specify the replacement page range. Click OK.



A. Enter the pages to be replaced in the original document. B. Specify the replacement page range.

To delete pages

You can remove a selection of pages from a PDF document. The Delete command cannot be undone, so make sure you want to delete the selected pages before clicking OK. Note this feature will become unavailable if you open a single-page PDF.

Delete pages using the Delete command

1. Open a PDF file and choose Document > Delete.
2. In the Delete Pages dialog box, define the page range to be deleted. Click OK.
3. Click OK in the popup confirmation dialog box.

Delete pages using the Page Thumbnails

1. On the Sidebar Navigation pane, click the Page Thumbnails icon to open the Page Thumbnails panel.
2. In the Page Thumbnails panel, select the page or Command-click to select multiple pages to delete.
3. In the Page Thumbnails toolbar, click the Pages Panel Option button and select Delete....
4. In the Delete Pages dialog box, the page range is already displayed in the Selected field. Click OK.
5. Make sure you want to delete the selected pages. Click OK.

Note: you cannot delete all pages because at least one page must remain in the document.

Duplicate pages

Move or copy a page within a PDF

1. Choose **Document > Duplicate** (you need to enter the Pages field manually this way); or on the **Sidebar Navigation pane**, click the **Page Thumbnails icon** to open the **Page Thumbnails panel**.
2. Do either of the following:

- In the **Page Range** section of the Duplicate pages dialog box, the page number of the selected page is automatically entered in the Selected field. You can select Range to specify the range of pages to copy, or select Current Page to copy the current page.
- In the **Destination** section, decide where to place the copied pages in the document.
- Then specify the number of copies.

3. Click **OK**.

*__Copy a page using Page Thumbnails__: Click the page thumbnail you want to copy, and Ctrl-drag it to a new location.

Copy a page between two PDFs using Page Thumbnails

1. Open both PDFs and display them side by side.
2. On the **Sidebar Navigation pane**, click the **Page Thumbnails icon** to open the **Page Thumbnails panel** for both PDF documents.
3. Directly drag the page thumbnail into the **Page Thumbnails panel** of the target document.
4. The page is copied into the document and the pages are renumbered.

Move a page & Swap two pages

Move a page

1. On the Sidebar Navigation pane, click the Page Thumbnails icon to open the Page Thumbnails panel.
2. Drag the page thumbnail or the page number box of the corresponding page thumbnail to the new location within the Page Thumbnails panel. A red bar appears to show the new position.

Swap two pages

The Swap Pages feature swap two pages within a PDF document. You can also directly drag and drop page thumbnails to reorganize them in the Page thumbnail panel.

1. Open the PDF file and choose any of the following:

    - Choose Document > Swap Pages....
    - On the sidebar navigation pane, click the Page Thumbnails icon to open the panel. Then click the Pages Panel Option icon and choose Swap Pages....

2. Right-click the page to swap and choose Swap Pages....
3. In the Swap Two Pages dialog box, type in the respective page number in Swap and For.
4. Click OK.

Note: this feature does not work when the PDF document consists of only one page.

Splitting a PDF into multiple files

Using Split Document, you can break one or more multipage documents into a set of smaller ones according to the criteria you define. After splitting, the source PDF remains unchanged in all cases.

Splitting produces one or more documents that contain all contents of source files. Under certain circumstances, the result PDF documents would be named Part001[Source file name], Part002[Source file name] and so on. If you split by text, bookmarks or bookmark layers in the source files, the names of result PDF documents will be determined by letters/words or bookmarks of your choice.

1. Open a multipage PDF file you want to break into different parts.
2. Choose Document > Split and the Split Document dialog box appears.
    - Under Source Document, specify a multipage document you want to split:
    - **Split pages**
        - **Split by file size: ___MB**. It splits your PDF document into parts with no more than a specified file size. The value limit should be between 0.50 and 50 MB.
        - **Split by parity of pages**. Split the source document by odd and even pages. The two output files will be named Odd segment of [source document name] and Even segment of [source document name].

- **Split by blank page.** Splitting creates a new document whenever a blank page is encountered. Every range of pages between blank pages will be saved into an individual PDF document.
- **Split by pages: ___ pages as a document.** Define how many pages each resulting document contains. Each output file contains an equal number of pages, except for the last file that may contain fewer pages. For example, if you enter 2 for a 5-page document, it will be split into 3 files with the first 2 file containing 2 pages and the last file containing only 1 page.
- **Split by pages containing text.** Any page containing the text (case sensitive) you specify will become the beginning of a new PDF document. In other words, a new file begins whenever the next occurrence of the entered text string is found. The first segment always starts with Page 1 even if it does not contain any specified text or word string. Comments and signatures are not checked for text match.
- **Split by pages.** The document is split based on the page numbers you specify (e.g. 2; 4; 6). The first segment always starts with Page 1. For example, in the case of splitting a 6-page PDF document, entering 2 and 4 will split the document into three parts with the first segment starting with Page 1, the second segment starting with Page 2, and the last segment starting with Page 4. You are warned if you enter invalid page numbers.
- **Split by bookmark.** Split the source document at the page where the bookmark you specify is found. The first segment always starts with Page 1.
- **Split by bookmark level.** Split the source document at the page where the specified bookmark level is found. The bookmark splitting is available only when the document contains bookmarks.
- **Extract by pages or page ranges.** The parts of the document are extracted based on user-defined pages or ranges that cannot overlap. The output files will be named "Segment 001 of [source document name]", "Segment 002 of [source document name]", etc. The warning message is given if the pages and ranges you enter overlap.
- **Extract pages containing text.** Only the pages containing the word or text string you specify (case sensitive) will be extracted. Comments and signatures are not checked for text match. The extracted pages are saved in a single file named by the entered text pattern.

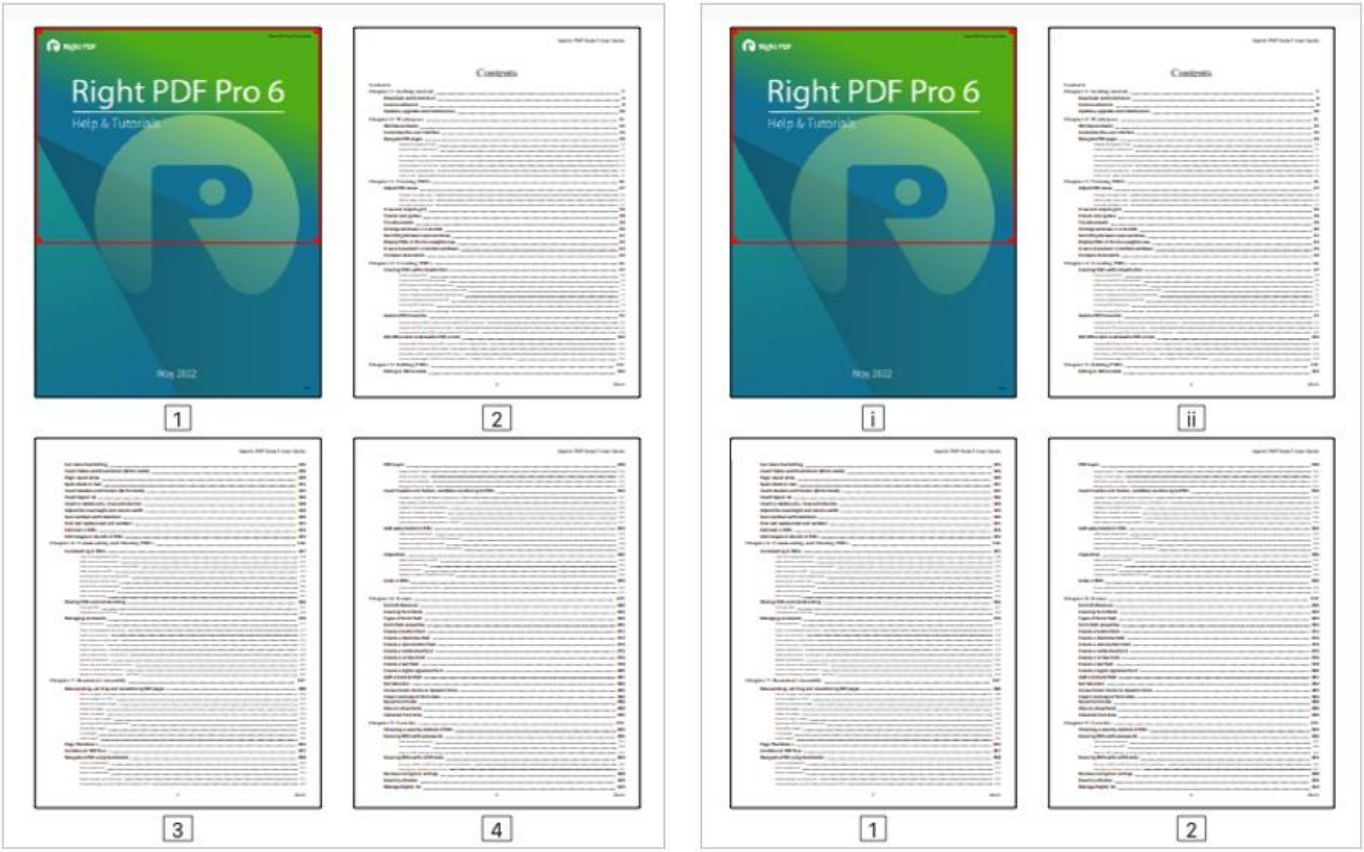
        - **Extract by bookmark.** All pages associated with a certain bookmark name will be extracted. This is case-sensitive. The output files will be as follows, e.g. "[bookmark name]_001", "[bookmark name]_002", etc.
        - **Extract by bookmark level.** All bookmark sections under the specified bookmark level will be extracted into a PDF document and named using the bookmark title. The resulting files are placed in automatically created folders that mirror the bookmark hierarchy. A generated HTML index file provides you with links of the extracted pages for easy file navigation. For example, you enter 2 to extract sections organized under second-level bookmarks. If there are two second-level bookmarks in the source document, two subfolders will be created and contain the files associated with the second-level bookmarks. The main folder is named by the original file.
    - **Numbering options**: The numbering options allow you to control how the output files will be named. Click the **Numbering Options** button and in the Numbering Options dialog box, set the values of Number of Digits, Start Number and Increment of Numbering. For example, if the split method chosen is “Split by pages” with 2 pages as a document, Start Number should be 1 and Increment of Numbering be 2, and the result PDF will be named “001_[source document name],” “003_[source document name]” and “005_[source document name].
    - **Output Options:** Decide where to save the result PDF file and how it’s named.
3. Click OK.

Renumber pages

The page numbers on the document pages do not always match the page numbers that appear below page thumbnails and in the Page viewing controls bar because some PDFs may contain preliminaries, e.g. a copyright page or table of contents that may not comply with the numbering.

Using Number Pages command, you can number the pages in the document in a variety of ways. You can specify a numbering style for a range of pages, or customize the numbering by adding a prefix and a starting number. For example, if you have two pages of table of contents in front and need to set the third page as Page 1, select the first two pages, specify a numbering style, such as i, ii, iii, and then set 1 as the starting number. As a result, you can see the numbering of the document displaying i, ii, 1, 2, 3, and so on in the Page Thumbnails panel.

1. Open a PDF file and do either of the following to open the Page Thumbnails panel:
    - Choose Document > Page Thumbnails.
    - On the Sidebar Navigation pane, click on the Page Thumbnails icon to open it.
2. On the Page Thumbnails toolbar, click Pages Panel Option and select Number Pages....
3. In the Page Numbering dialog box,
    - Under Pages, select All or specify a page range. The Selected refers to the page thumbnails selected in the Page Thumbnails panel.
    - Under Numbering, select one of the following and click OK. (1) Begin new section. It starts a new sequence. Select a numbering style from the Style drop-down menu. Then, define the starting number of the section and enter a prefix as needed. (2) Extend numbering used in preceding section to selected pages. It continues the page numbering sequence from previous pages.
4. Click OK.



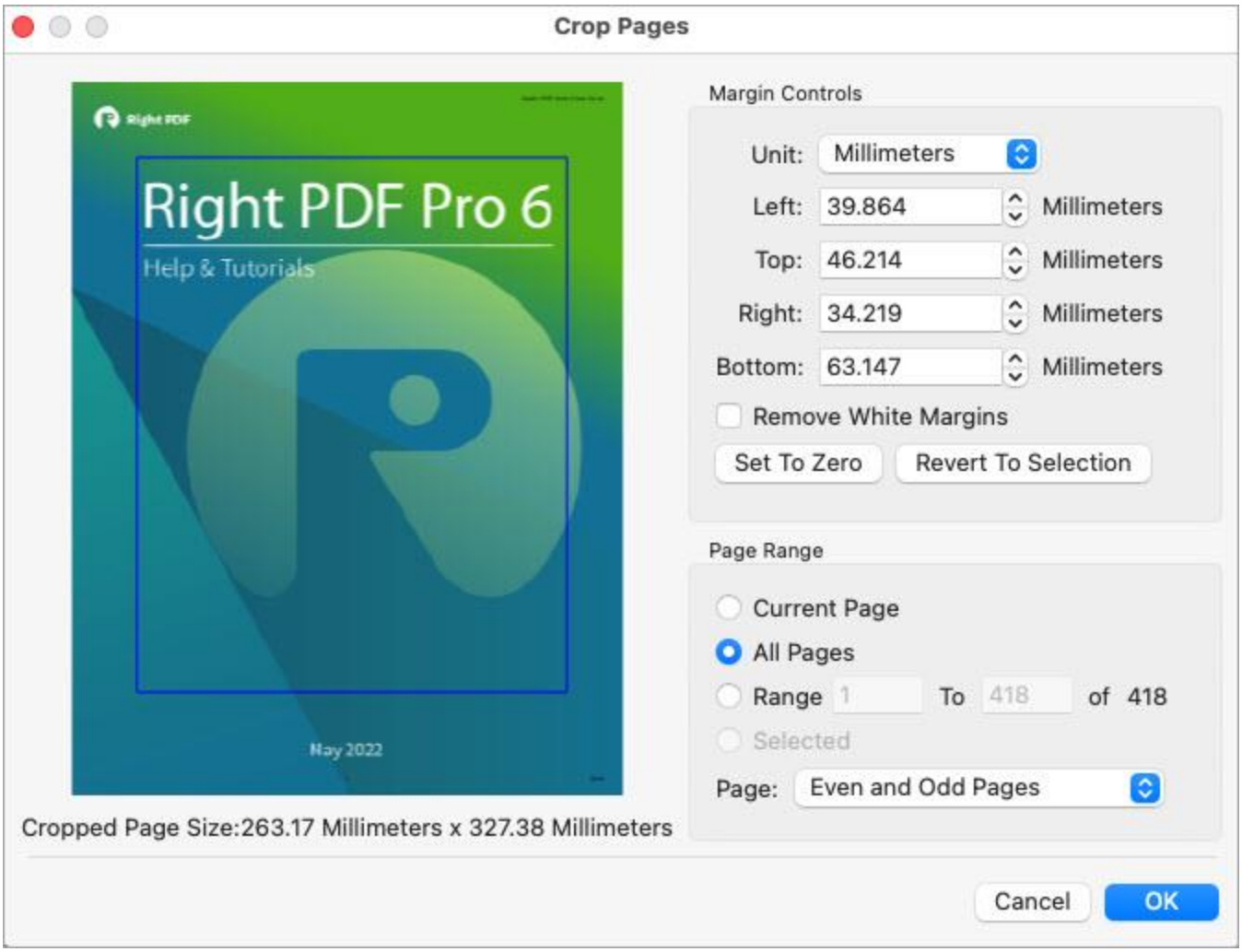
Logical page numbering (Left) The first two pages renumbered. (Right)

Note: the Number Page command affects only the logical page numbering shown in the Page Thumbnails panel and in the Page viewing controls bar. The page numbers shown on the document pages remain intact.

Crop pages

If the PDF document consists of pages of different sizes, you can use the Crop tool and the Crop Pages dialog box to keep the PDF consistent. You can adjust the visible page area by hiding the area outside your selection. As mentioned earlier, cropping page is simply hiding the information, not removing it, and therefore the file size will not be affected.

1. Open a PDF file and choose Document > Crop.
2. Drag a rectangle on the page to crop. To adjust size, drag the corner handles of the cropping rectangle.
3. Double-click inside the crop area to enter the Crop Pages dialog box or right-click on the page thumbnail and select Crop....
4. In the Crop Pages dialog box, you can drag the blue frame to adjust your selection and do the following:
    - In the Margin Controls section, view the margin measurements of the cropping rectangle. You may make selections by editing the values in the fields.
    - Check Remove White Margins to crop the page to the boundary. It may be useful when you need to trim presentation slides saved as PDF.
    - Click Set To Zero to restore the crop margins to zero.
    - Click Revert To Selection to revert to the crop area selected with the Crop tool.
    - In the Page Range section, specify the pages to be cropped.
5. Click OK.



Crop a page with the Crop tool

Insert pages

Insert lets you add blank pages, clipboard content, scanned content, or pages from other PDFs into the current document. You can specify the range of pages to insert and an insert location.

Insert pages from a file into a PDF

1. Open a PDF file and choose Document > Insert.
2. Select Insert from File from the list of insert options and choose a file in the Open dialog. Click Open.
3. In the Insert Pages dialog box, do the following:

- **Source Files.** Files listed in the box will be inserted at the specified location in the current document. You can click Add to select more source files.
- **Select Source Pages.** Choose all pages or specify a range of pages to insert.
- **Location.** Choose to insert the selected source pages Before or After the specified location of the current document.
- **Page.** You can choose to place the inserted pages Before or After (depending on the Location) the First Page, Last Page, Current Page, or specified pages of the current document. See the following examples:
  - If you select After and First Page, the selected source pages will be placed after the first page, with the first page of the selected source pages set as page 2 in the current document.
  - If you select Before and Last Page, the selected source pages will be placed before the last page, with the last page of the selected source pages set as the second-last page of the current document.
  - If you select After and Current Page, the selected source pages will be placed after the current page.
  - If you select Before and Page Number X, the selected source pages will be placed before Page X.

4. Click OK.

Insert blank pages into a PDF

1. Open a PDF file and choose Document > Insert.
2. Select Insert Blank Page from the list of insert options.
3. In the New Pages dialog box, define the number of blank pages to insert and specify where the blank pages are placed as needed.
4. Click OK.

Insert clipboard content into a PDF

1. Open a PDF file and choose Document > Insert.

2. Select Insert from Clipboard from the list of insert options. Note that you can insert content copied from any application.
3. In the Insert Pages from Clipboard dialog box, specify where the inserted clipboard content is placed.
4. Click OK.

Note: you will not be able to use this option given insufficient amount of data in Clipboard.

Insert scanned content into a PDF

1. Open a PDF file and choose Document > Insert.
2. Select Insert from Scanner from the list of insert options.
3. Select a scanner and edit Document settings. You can run OCR to make scanned pages searchable.
4. Click Scan. In the Insert Pages From Scanned Pages dialog box that pops up, select the insertion point and click OK.
5. When finished, Scan More dialog box appears. You can wrap up the current scan or choose **Scan more pages**.

Page Thumbnails

Page Thumbnails basics

Page thumbnails act as miniature previews of the pages in a PDF document. With Page Thumbnails, you can get an overview of the document and navigate through pages with ease. Everything you do to the page thumbnails is applied to their corresponding pages, such as moving, rotating, or deleting. The red frame in a thumbnail indicates the area currently displayed in the Document Pane. You may move the red frame to change the area to be viewed or drag it to adjust its magnification.

To view page thumbnails

Open a PDF file and do either of the following to open the Page Thumbnails panel:

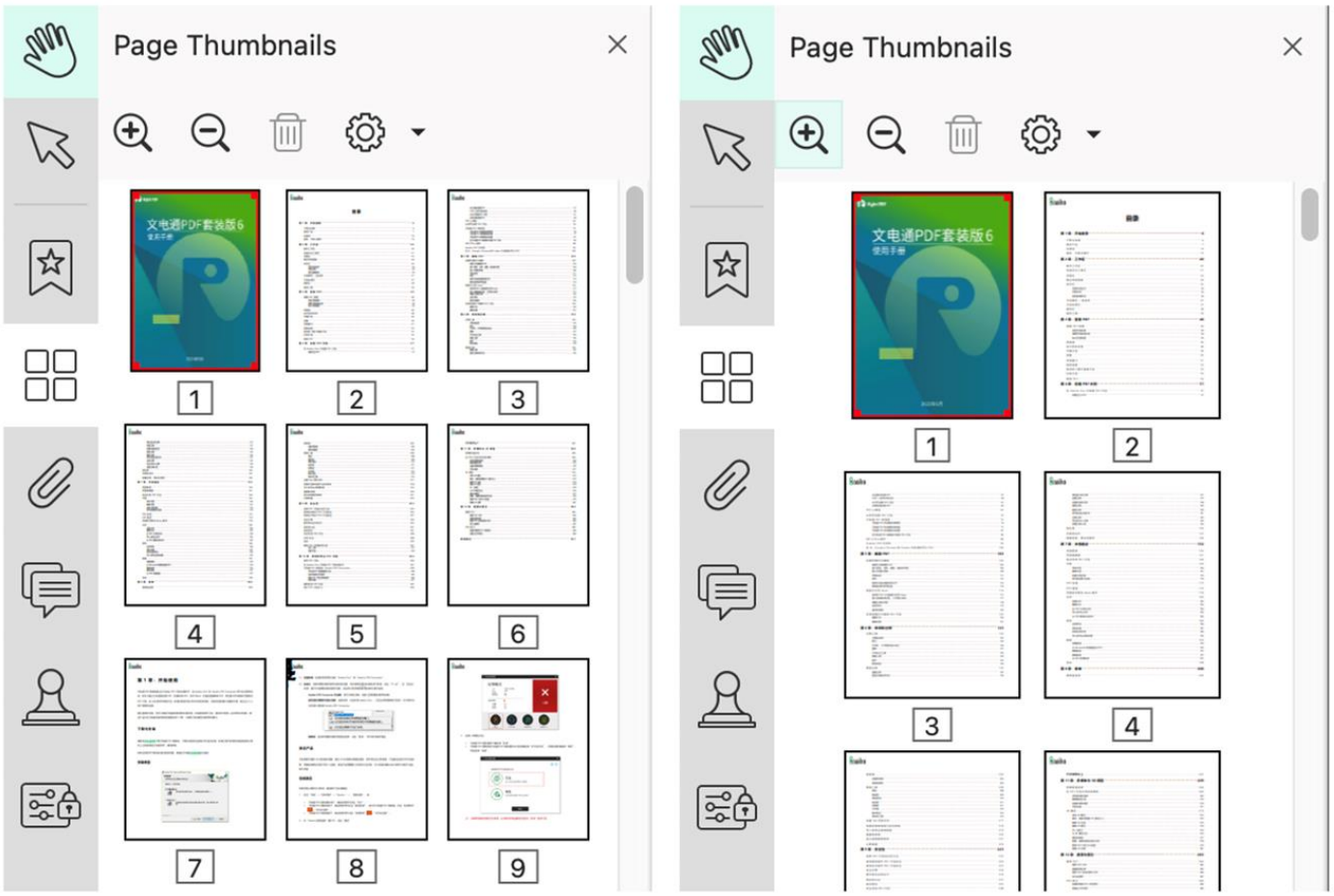
- Choose Document > Page Thumbnails.
- On the Sidebar Navigation pane, click the Page Thumbnails icon.

To zoom in thumbnails

- In the Page Thumbnails toolbar, click Pages Panel Option and select Enlarge Page Thumbnails.
- In the Page Thumbnails toolbar, click Enlarge Page Thumbnails.

To zoom out page thumbnails

- In the Page Thumbnails toolbar, click Pages Panel Option and select Reduce Page Thumbnails.
- In the Page Thumbnails toolbar, click Reduce Page Thumbnails.



Reduce Page Thumbnails. (Left) Enlarge Page Thumbnails. (Right)

Define the tabbing order

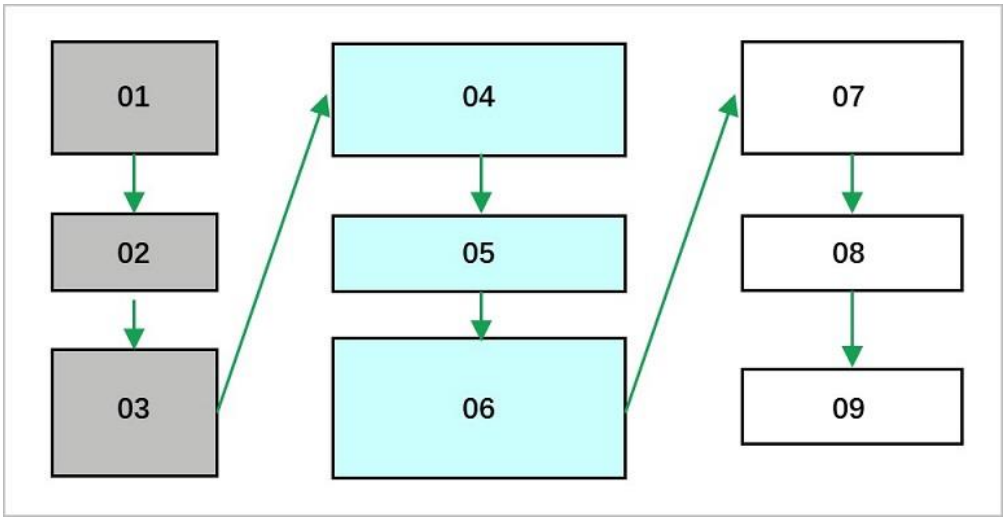
You can set the order in which a user tabs through form fields, links and comments for each page.

1. Set the tabbing order using a preset option
    - On the Sidebar Navigation pane, click the Page Thumbnails icon.
    - Choose Document > Page Thumbnails.
2. Do any of the following to open the Page Properties dialog box:
    - Select a page thumbnail, right-click on it, and select Page Properties... from the options.
    - In the Page Thumbnails toolbar, click Pages Panel Option and select Page Properties... from the options.

In the Page Properties dialog box, you can configure tabbing order and page actions, like specifying the actions to be performed when opening or closing a page, jumping to a certain page view, or opening links.

Set the tabbing order

- **Use Row Order.** Press the tab key to move through each row down the page horizontally.
- **Use Column Order.** Press the tab key to vertically move down each column across the page.
- **Use Document Structure.** Tab in the order specified by the application the document was created in.
- **Unspecified.** Tab by form fields, links or comments. When order is unspecified, you can use Set Tabbing Order to manually set the tabbing order of form fields, as follows.
    - In the Page Properties dialog box, click Tab Order and select Unspecified from the tab order options. Click Close.
    - Choose Form > Set Tab Order Tool. Click OK.
    - A number appears in the upper-left corner of each form field, indicating the tabbing order you set. Click the form fields in the desired order.
    - Click anywhere on the page other than the form fields to finish.



Set tab order. The tabbing moves in the order you created the form fields.

To define page actions

- **Select Trigger.** Define how to initiate a page action. From the Select Trigger drop-down menu, choose Page Open to set an action when the page is opened, or choose Page Close to set an action when the page is closed.
- **Select Action.** Specify the action the page performs when triggered and click Add...:
- **Do Action.** It displays the list of triggers and actions you defined for the page. To perform multiple actions, select another action from the menu and click Add... to add it to the list.
    - Click Delete to remove the selected action from the Do Action list.
    - Click Edit to change settings for the selected action.
    - Use Up/Down buttons to arrange the actions in the order you want them to occur. The buttons are available only when there are multiple actions under the same trigger.

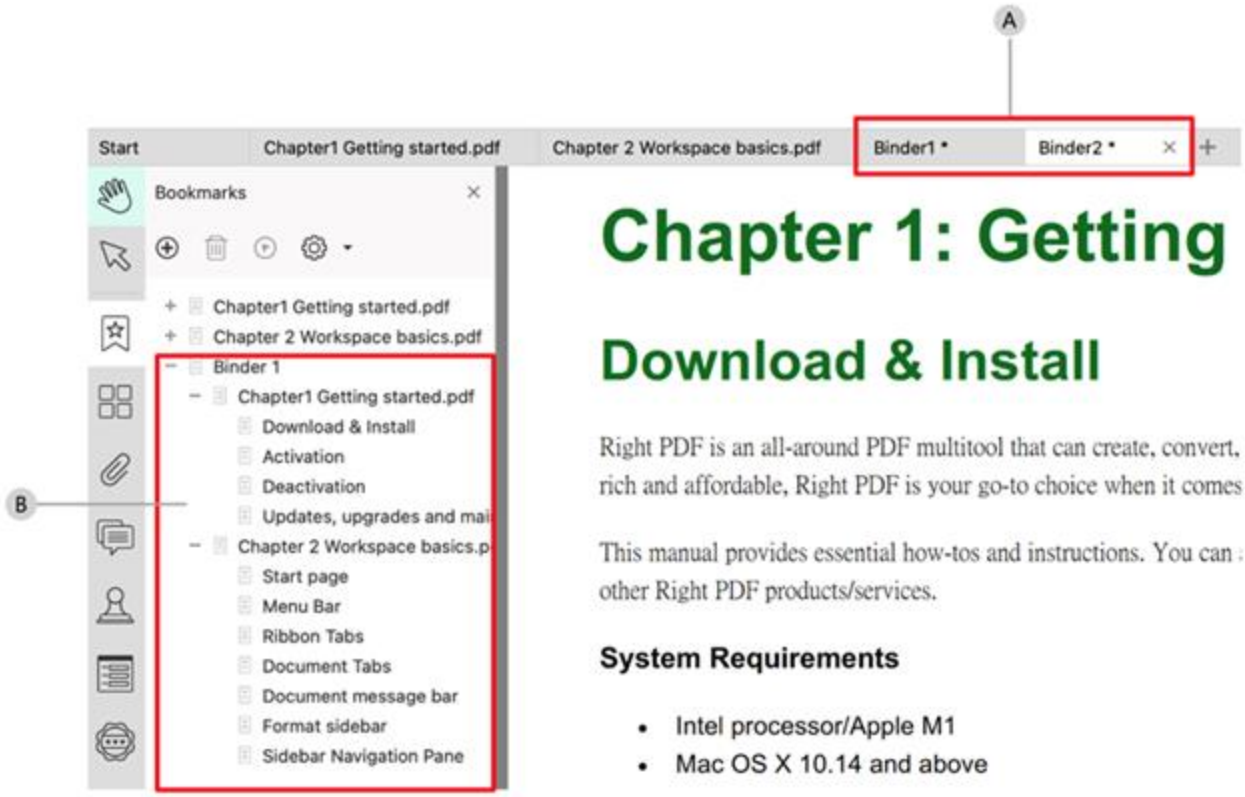
Combine all PDF files

The Combine All feature lets you combine Word, Excel, PowerPoint, web pages and documents that have been opened. Before merging to create a new PDF, you can preview and arrange files/pages, delete unneeded pages and move pages around.

1. In Right PDF (macOS), select Advanced > Combine All. If there are digital signatures in the open files, you'll see a message stating digital signatures will not be retained in the result document. Click OK.
2. In the Combine Files dialog box, all open files are listed. You can use Add to add more files to be merged and Delete to remove files. Check Add file names as Bookmarks if you would like to have bookmarks automatically added to the result file and named after each source file.
3. Do any of the following as needed:

    - **Rearrange Pages.** In the Thumbnail view, drag the file or page into position. While you are dragging, a red bar moves between pages or documents to indicate the current position.
    - **Expand pages or Collapse Document.** In the Thumbnail view, move the cursor and hover over the page or file, and click the Expand icon  . Once expanded, you can easily move individual pages among the other pages and documents. To collapse pages, move the cursor and hover over the first page, and click the Collapse icon  .
    - **Preview pages.** In the Thumbnail view, select a page and click the Preview button.
    - **Delete pages.** In the Thumbnail view, select a page and click the Delete button.
    - **Sort files.** In the List view, click the column name you want to sort by, and click again to sort in reverse order. The order in the list of files reflects the order of files in the merged PDF. Sorting rearranges the pages of the combined PDF.
    - **Move files up or down file list.** In the List view, select one or multiple files you want to move, and then click the Move Up or Move Down button.

4. Click  to create a Binder file and open it as a new tab(A) in the window.
5. In the Bookmarks panel of the result file, all source files are added as bookmarks(B), including those nested under other binder files. For example, given Binder 2* contains multiple files (including Binder 1*), all files including those under Binder 1* will be listed as bookmarks as shown below.



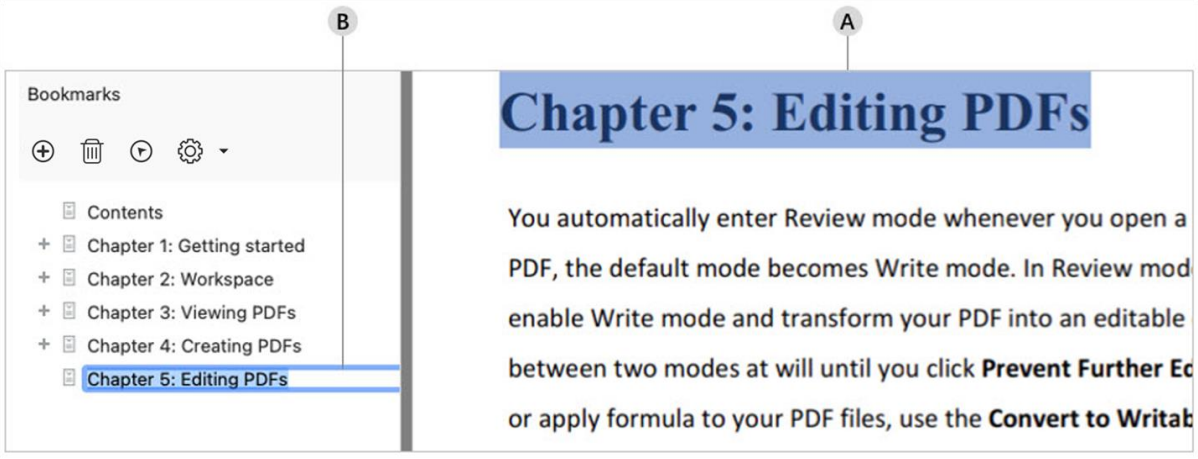
A. Created binder files appear as tabs in the Right PDF window where the Combine All feature was used.

*B. Files within a binder file are also listed as bookmarks in the Bookmarks panel.*â€‹â€‹â€‹

destination, for example a page view. Also, by simply dragging bookmarks underneath another bookmark, you can create a bookmark hierarchy which serves to show a relationship between topics.

Add a new bookmark

1. Open a PDF file and do either of the following to open the Bookmarks panel:
    - Choose Document > Bookmarks.
    - On the Sidebar Navigation pane, click the Bookmarks icon.
2. Locate the position you want to add the bookmark.
3. Do any of the following to add bookmark:
    - In the Bookmarks toolbar, click the New Bookmark button and name the new bookmark. The current view is set as its destination.
    - Open the Bookmarks panel and use the Select tool to highlight the text to use as the name of the bookmark and do either of the following: Click the New Bookmark button in the Bookmarks panel. Or right-click on the selected text and select Add Bookmark from the context menu.



The selected text (A) will turn into bookmark (B)

Edit a bookmark

Rename a bookmark label

1. Open a PDF file that contains bookmarks or create bookmarks by yourself.
2. In the Bookmarks panel, select a bookmark and do either of the following:
    - Right-click on it and select Rename Bookmark from the options. Then type the new bookmark name.
    - Double-click on it and type the new bookmark name.
    - Click on Bookmarks Panel Option and select Rename Bookmark. Then type in the new bookmark name.

Edit preferences of bookmarks display

You can go to Bookmarks Panel Option > Preferences to decide how bookmarks look.

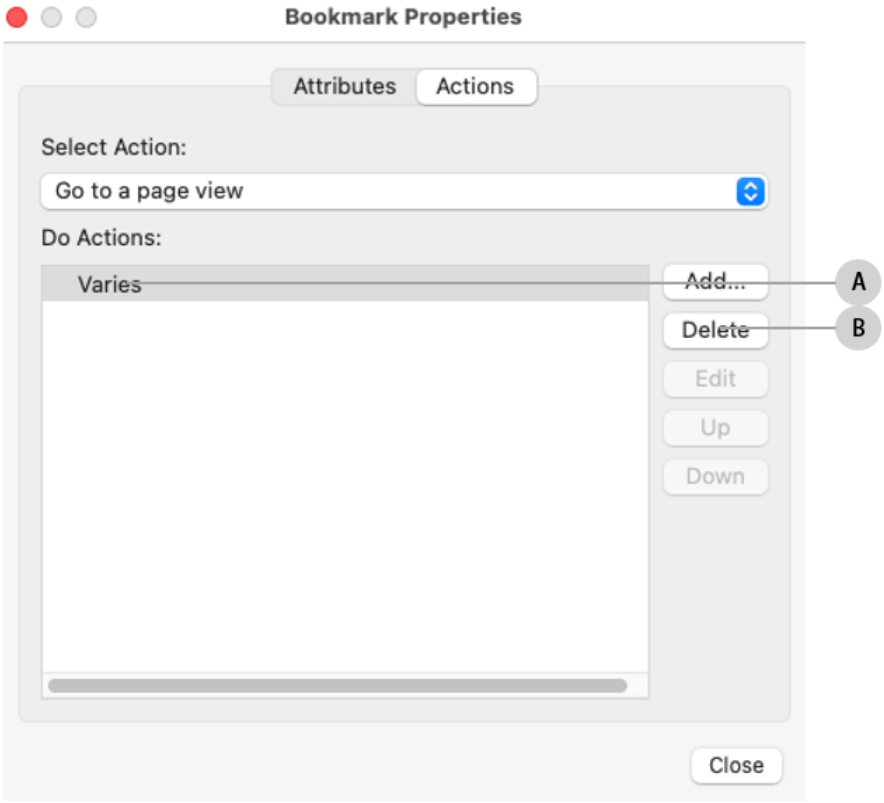
- To highlight current bookmark. Once selected, when you are viewing the content the bookmark points to, the **paper sheet** sign to the left of the bookmark becomes highlighted .
    - Click the **Bookmarks Panel Option** button at the top of the Bookmarks panel, and choose **Preference > Highlight Current Bookmark.**
    - If deselected, the bookmark icon  of the page you are viewing stays dimmed.
- **Hide After Use.** The Bookmarks panel can be automatically closed after you click a bookmark to go to its destination. Click the **Bookmarks Panel Option** button at the top of the Bookmarks panel and choose **Preference > Hide After Use**.
- **Text size.** Decide the text size of bookmarks. Click the **Bookmarks Panel Option** button at the top of the Bookmarks panel and choose **Preference > Text Size > Small / Medium /Large**.

Customize bookmark appearances and behavior

- **Change the text appearance**: You can change the appearance of one or more selected bookmarks to draw extra attention to them.

1. Open the Bookmarks panel and select one or more bookmarks. To select multiple bookmarks, click on one and Command-click to select more.
2. Right-click on any of the selected bookmarks and select Properties....
3. In the Attributes tab of the Bookmark Properties dialog box:
    - Style. Select a text style as desired from the drop-down menu.
    - Color. Click the colored square and choose a preset color or define a custom color.
4. Click Close.

- Add an action to a bookmark: Bookmarks can be set to perform one or more actions in the order you specify.
    1. Open the Bookmarks panel and select one or more bookmarks.
    2. Right-click on the selected bookmarks and select Properties....
    3. In the Actions tab of the Bookmark Properties dialog box, you can see the default action is to go to a defined page in the document. Select one action from the Select Action drop-down menu and click Add...
    4. Use the Up and Down buttons to set up the action order.
    5. Click Close.
- Add the same actions to multiple bookmarks
    1. Open the Bookmarks panel and Command-click to select multiple bookmarks.
    2. Right-click on the selected bookmarks and select Properties....
    3. In the Bookmark Properties dialog box, assign an action by selecting one from the Select Action drop-down menu and click Add to add it to the Do Actions list. If you see Varies (A) in the Do Actions list, delete it (B) to proceed.



Set where a bookmark points to

When you create a new bookmark, the current view is set as the destination the bookmark points to. You can set a new destination for a bookmark.

1. In the Bookmarks panel, select a bookmark.
2. Move to the target location in the current PDF document and change the page zoom if necessary. When finished, click the Set Destination button at the top of the Bookmarks panel.
3. When prompted, click OK to set the new destination of the selected bookmark to the current location.

Delete a bookmark

In the Bookmarks panel, select one or more bookmarks and do any of the following to delete:

- Right-click on a selection of bookmarks and select Delete Bookmark(s) from the options.
- Press the Delete key on your key board.
- Click the Delete Bookmark button.

  Note: if a bookmark is deleted within multi-level structure, you also delete any bookmarks that are subordinate to it. However, text in the document is not affected.

Build a bookmark hierarchy

To nest bookmarks

In the Bookmarks panel, do either of the following to nest bookmarks:

- Select one or more bookmarks and click-drag it beneath the parent bookmark. A blue line appears while you are dragging the bookmark, indicating where the bookmark will be placed.
- Right-click on a bookmark and select Add a Sub-bookmark. Then type a name and set its destination.
- Select one or more bookmarks, right-click and choose Cut from the menu. Then, right-click on the parent bookmark and select Paste after the Selected Bookmark from the options menu.

To move bookmarks out of a nested position

In the Bookmarks panel, select the bookmark or range of bookmarks and do one of the following:

- Drag the selected bookmarks directly above the parent bookmark, or above or underneath other bookmarks. A blue line appears while you are dragging the bookmark, indicating where the bookmark will be placed.
- Right-click on the selected bookmarks and select Cut from the options menu. Then, right-click on the parent bookmark and select Paste after the Selected Bookmark from the options menu.

Convert bookmarks to Table of Contents (TOC)

You can convert bookmarks and the hierarchy thereof to a Table of Contents. The generated TOC retains the page numbers and links. You can also remove, update, and export the generated page of Table of Contents.

To convert bookmarks to Table of Contents

1. Open a PDF file that contains bookmarks or create bookmarks.
2. Establish a bookmark hierarchy as needed. See Build a bookmark hierarchy.
3. In the Bookmarks panel, click the **Bookmarks Panel Option** button and select **Create Table of Contents…** from the options.
4. In the **Table of Contents Settings** dialog box, the tabs offer the following settings:
    - **Contents**. Select a display level and a style of symbol-line. Then, determine whether page numbers should be displayed and right-aligned. You can then select a predefined format from the **Format** drop-down menu. To customize the appearance, select **Custom** and click **Edit…**.
    - **Contents Page**. Give it a name, define its size, and determine its position within the document. Click **Appearance…** to reformat a Table of Contents title if needed.
5. Click **OK**.

To remove a Table of Contents

All pages of TOC will be removed from the document and all actions linked to the TOC will be disabled. Optionally, you can delete a page of TOC using the Remove Table of Contents command from the options menu in the Bookmarks panel or using Page Thumbnails to delete the page.

- **To remove using the Remove TOC command**
    1. In the Bookmarks panel, click the **Bookmarks Panel Option** button  and select **Remove Table of Contents.**
    2. Make sure you want to delete the Table of Contents and click **OK**.
- **To remove using Page Thumbnails**
    1. **Do either of the following to open the Page Thumbnails panel:**

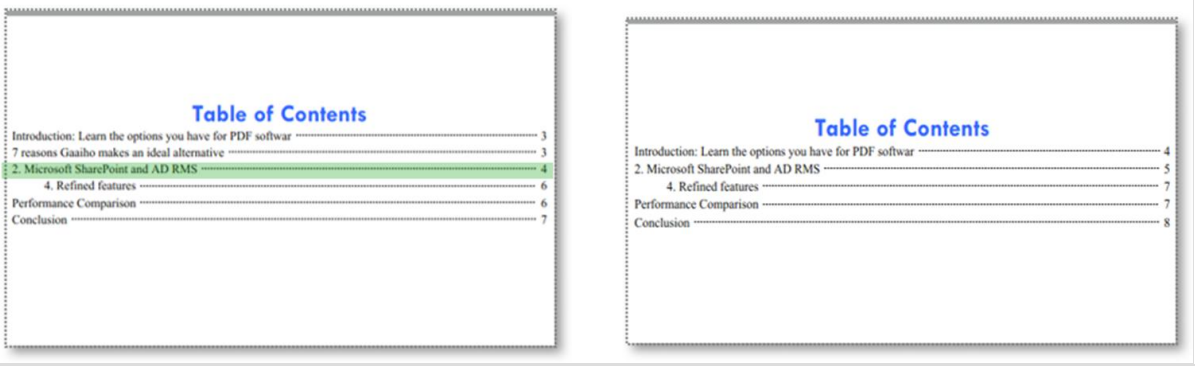
- Choose **Document > Page Thumbnails** .
- On the Sidebar Navigation pane, click the **Page Thumbnails** icon .

2. **To delete the TOC, do any of the following:**
   - Select and right-click on the thumbnail of the TOC and select **Delete**… from the options.
   - Select the thumbnail of the TOC and click the **Delete selected pages** button in the Page Thumbnails toolbar.
   - Select the thumbnail of the TOC and directly press the **Delete** key on your keyboard.

Update a Table of Content

You can use the Update Table of Contents commands to update the TOC if you added or removed bookmarks or if the pagination of the document has been changed, as a result of inserting a blank page or deleting a page.

1. In the Bookmarks panel, click the **Bookmarks Panel Option** button and select **Update Table of Contents**.
2. A message appears informing all actions linked to the TOC will become invalid once updated.
3. Click **Yes** to proceed.



***TOC before update** (Left) **>** insert a page and delete a bookmark **> TOC updated** (Right): renumbered and an item deleted*

Export the Table of Contents

1. In the Bookmarks panel, click the **Bookmarks Panel Option** button  and select **Export Table of Contents…**.
2. In the **Table of Contents Settings** dialog box, make changes to its appearance and display settings. Click **OK**.
3. In the Save dialog box, name the file to export and locate a path to save it. Click **Save**.

PDF tags

PDF Tags provide information regarding the content of a document, such as the type of text, object, and their reading order. This is helpful when disadvantaged readers require assistive software to interpret and present a document to them in a logical fashion. Without tags, the software may be forced to guess the correct order and could lead to unpredictable results. Additionally, pictures or other visual aids require tagging as well, so they can be described in audio form.

The Tag panel allows you to view and edit tags in the logical structure tree. The tags in the Tag panel are displayed in a hierarchical order which indicates the reading sequence of the document. The very first item in the panel is always the Tags root, and all other items are its children. Note that changes made to tag tabs cannot be undone by the undo command, so please make sure that you save a backup copy of the document before editing tags.

Add a new tag

1. To open the Tag panel, choose Document > Tag, or on the sidebar navigation pane, click the Tag panel icon.
2. Select a tag which you want to add a tag to, and either right-click on it or click PDF Tags Options and choose New Tag....
3. In the New Tag dialog box, select a type from the Type drop-down menu and enter a Title. Click OK.
4. The new tag becomes a child of the selected tag.

Create a new tag from selection

In the Tag panel, decide where you would like to place the new tag, and then select the text with the Select tool. Click PDF Tags Options and choose Create Tag from Selection.

Edit tags with the Tag panel

You can edit a tag title, change a tag location, or change the tag type.

To change a tag type

Select the tag and choose Properties... from the PDF Tags Options menu, or right-click the tag and choose Properties.... Select a new type from the menu and click Close.

To edit a tag title

Select the tag and choose Properties... from the PDF Tags Options menu, or right-click the tag and choose Properties.... Enter text in the Title box and click Close.

To move a tag

In the Tag panel, expand the Tags root to view all tags. Select the tag icon of the element you want to move and do one of the following:

- Directly drag the tag to the location you want. As you drag, a line appears at viable locations.
- Choose Cut from the PDF Tags Options menu, and select the tag that appears above the location where you want to paste the cut tag. Then from the PDF Tags Options menu, choose Paste to move the tag to the same level as the selected tag.
- Alternatively, from the PDF Tags Options menu, choose Paste Child to move tags around under the selected tag.

PDF layers

Layers let you separate different elements of a PDF page, which can be especially useful when you are working with architectural plans that involve layers of elements. In Right PDF, not only can you

control the display of layer using the default and initial state settings, but also rename, merge and flatten layers, and change the properties of layers.

Import layers

You can import layers from a PDF or image file into another PDF. Right PDF supports image files in the following formats: BMP, GIF, SHP, JPEG, JPEG 2000, PCX, PNG, and TIFF.

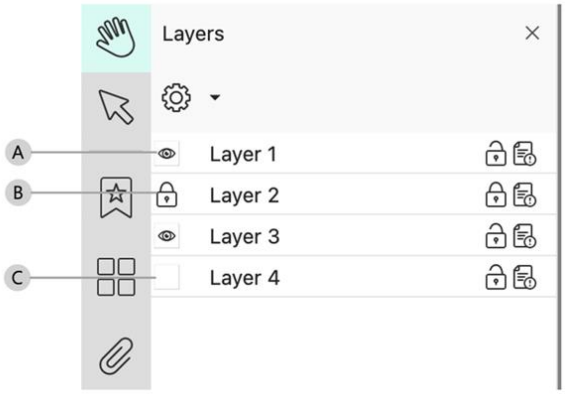
1. Open a PDF file and choose Document > Layers.
2. In the Layers panel, click the Options button and select Import as Layer... from the options.
3. In the Import as Layer dialog box, click Browse and locate a file to import. If the source file is a multipage document, use the up and down arrows or enter the value to set the page number you want to import in Page Number.
4. In the Import Options section, select one of the following import options:
    - **Create new layer.** Create a single, separate layer from the source file. Click and enter a name for the new layer.
    - **Add to group.** Add the imported layer to the existing layer group. Click the drop-down arrow and specify a layer group. This option is available only when there are one or more existing layer groups in the target PDF document and when the Create new layer option is selected.
    - **Add to existing layer**. Specify an existing layer to add the content from the source document. The imported content will have the same layer properties as the layer in the target document. This option is available only when the target document already contains layers.
    - **Copy layers from source**. Import layers from the source document to the target PDF document. This option is available only when there are layers in the source document.
5. In the Position section, adjust the scale, position, and rotation settings as needed.
6. In the Appearance section, set a transparency level for the new layer, and whether it is placed in front of the page or behind it.
7. In the Preview section, specify the Target page number if the target file is a multipage document.
8. Click OK.

Note: once placed, layers cannot be deleted or replaced, so please double check before you proceed.

Show or hide layers

You can show or hide the content associated with each layer in the Layers panel. Some layers may be organized into nested groups with a parent layer. The lock icon to the right of each layer name acts like a switch which lets you lock or unlock the layer, but you are not allowed to change the visibility of locked layers. On the other hand, the eye icon next to each layer name indicates the visibility of the layer. The layer is visible if the eye icon is present and hidden if absent.

Note: you are not allowed to change the visibility of locked layers.



A. An eye icon indicating a displayed layer B. Locked layer C. Hidden layer

1. Open a PDF file and choose Document > Layers.
2. To hide or show a layer:
    - To hide a displayed layer, click the eye icon next to left of the layer name.
    - To show a hidden layer, click the empty box to restore visibility.
3. Click the Options button and select one of the following from the options menu:
    - **List Layers for All Pages.** Display every layer across all pages of the document.
    - **List Layers for Visible Page**. Show layers on the currently visible pages only.
    - **Reset to Initial Visibility.** Reset layers to their default state as defined in the Default state in the Layer Properties dialog box.

- **Apply Print Overrides.** Display layers according to the Print settings in the Layer Properties dialog box (print if visible, never, or always).
- **Apply Export Overrides.** Display layers according to the Export settings in the Layer Properties dialog box (export if visible, never, or always).
- **Apply Layer Overrides.** Make all layers visible, even layers not listed in the Layers panel or layers grouped under their parent layers. You cannot change layer visibility using the eye icon until this command is deselected. To make changed layer properties take effect, you can choose Reset to Initial Visibility in the options menu, or save the file and reopen it. See Edit layer properties for details.
- Select Expand All or Collapse All to expand or reduce the layer-tree.

Edit layer properties

The Layer Properties allow you to rename a layer or adjust various settings, such as default state, visibility, print and export initial state. If you have selected **Allow layer state to be set by user information in Preferences, the settings will take effect.**

1. In the Layers panel, do one of the following to open the Layer Properties dialog box:
   - Click the Show property icon to the right of the layer.
   - Select a layer, click the Options button and select Layer Properties... from the options.
2. In the Layer Properties dialog box, edit the name of the layer or any of the following properties and then click OK.
   - **Intent.** Select View to allow changing layer visibility state, which means you can click the eye icon to turn it on or off. If Reference is selected, however, the layer stays visible at all times and you are not allowed to change the layer properties, except for the layer name.
   - **Default state.** This option lets you define the initial visibility state of the layer when the document is first opened or when the Reset to Initial Visibility command is used. Select On or Off to make the layer visible or invisible when the document is first opened, or when the initial visibility is reset.
   - **Initial State:** under this you can set Visible, Print and Export options.
     - Visible lets you define the on-screen visibility of the selected layer. If you select If on, the default state determines whether this layer is shown or hidden when the

document is opened. If you select Never, the layer is hidden when the document is opened. If you select Always, the layer is shown when the document is opened.

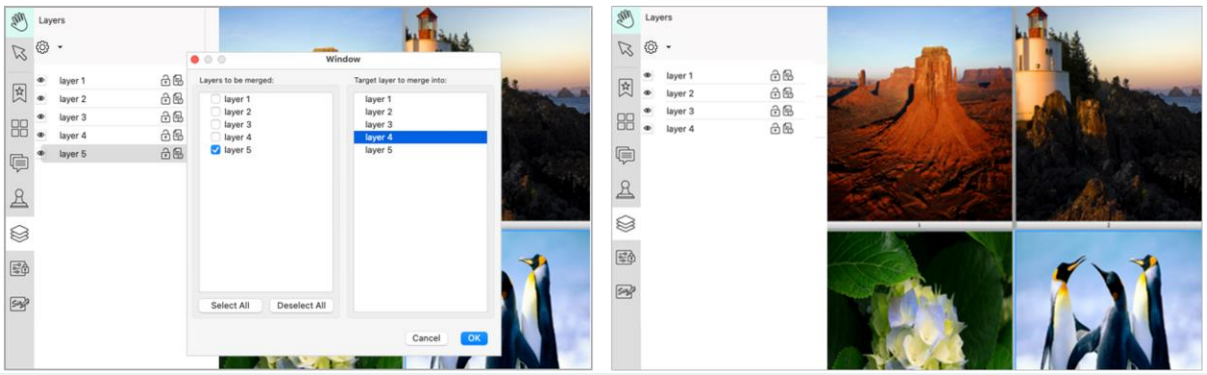
- Print lets you define under which condition a layer will print.
- Export lets you decide if the layer appears in the resulting document when the PDF document is exported to an application or file format that supports layers.

Merge or flatten layers

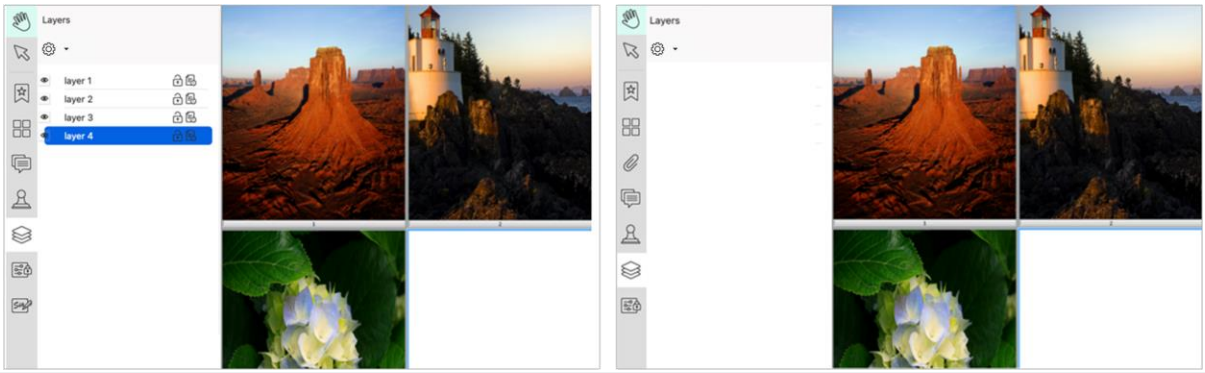
The merged layers acquire the properties of the layer into which they are merged. Meanwhile, Flatten Layers lets you merge all layers into the document, hiding any content that is invisible.

Note that you cannot undo either action upon completion.

1. Open a PDF file that contains layers and choose **Document > Layers**.
2. In the Layers panel, click on the Options button and select **Merge Layers...** or **Flatten Layers**.
    - **Merge Layers.** In the Layers to be merged box to the left, select one or more layers to be merged. In the Target layer to merge into box to the right, select the target layer into which the selected layers will be merged. Click OK. The selected layers are combined with the target layer and can no longer be present in the Layers panel.
    - **Flatten layers.** In the box that pops up, click OK to proceed the operation.



Using the Merge Layers dialog box (Left) The fifth layer is merged into the fourth layer (Right)



The visibility state of the second layer is off. (Left) All layers are merged into the document and the invisible content is hidden. (Right)

Insert headers and footers, and Bates numbering to PDFs

Right PDF lets you **add headers and footers** throughout a PDF document, which can be textual information such as date and time, author, title, page number, Bates numbers and more, appearing along the top or bottom across all PDF pages or a range of pages in one or more PDF documents.

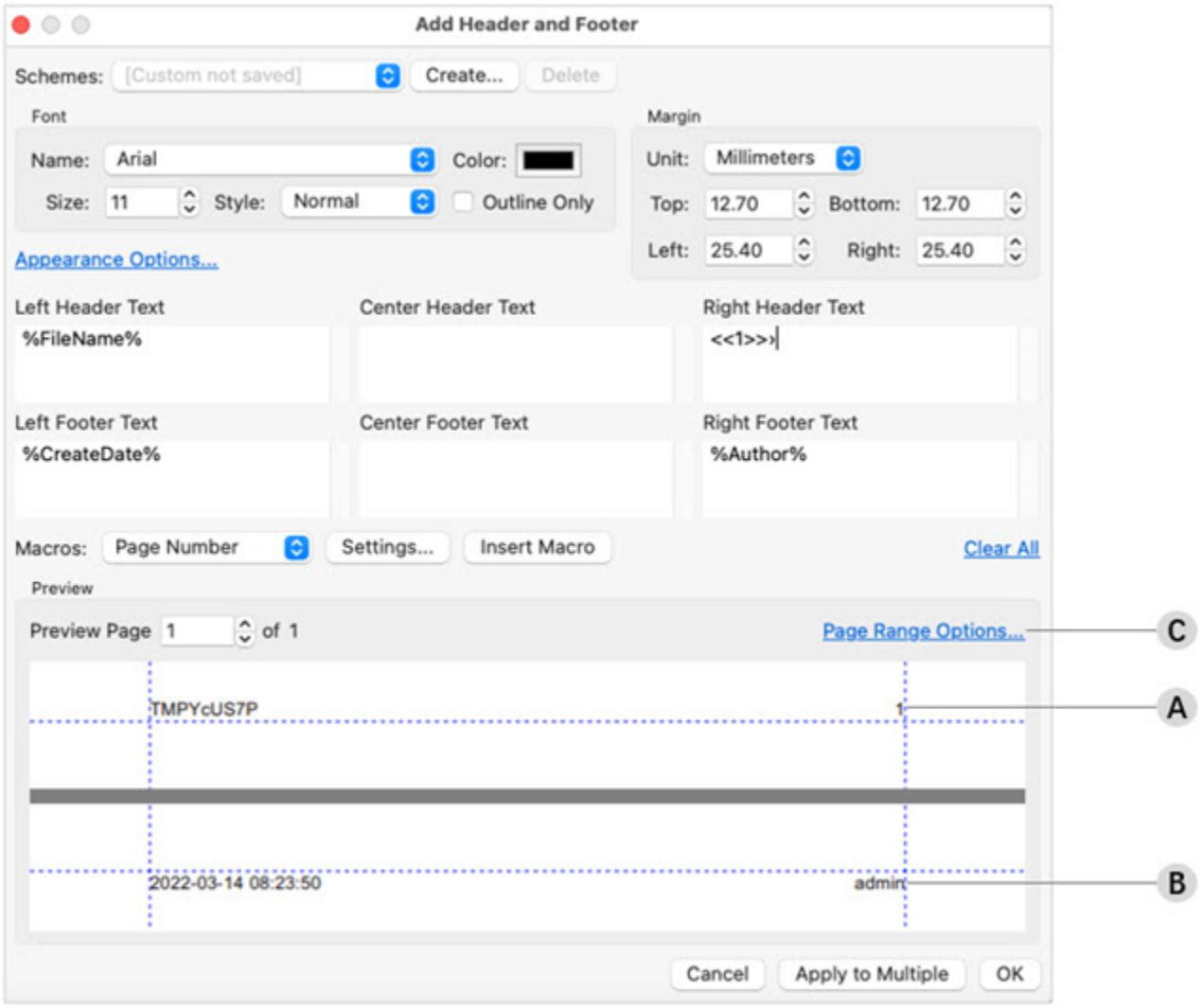
The **Bates number** appears as a header or footer on specified pages and can be combined with other header or footer texts. Using the Bates numbering tool, you can identify each page in a set of documents by assigning a series of unique, self-incrementing numbers.

Add Headers and Footers to a file or multiple files

1. Open a PDF file and choose Document > Header and Footer . Select Add... from the drop-down menu.
2. In the Add Header and Footer dialog box:
    - If there are headers and footers profiles available, you can choose one from the Macros drop-down menu.
    - Set up the Font and Margin for the header and footer. The font and margin properties apply to all header and footer entries, meaning you are not allowed to apply a different setting to individual header or footer.
    - To prevent overlapping, click Appearance Options... and check the Shrink document to avoid overwriting the document's text and graphics option.
    - To add textual information, do any of the following:

- Type text in any of the six boxes.
- Select a predefined item from the Macros drop-down menu, click on any of the six boxes in which you want to place the macro, and click Insert Macro.

- Click Page Range Options...to specify pages on which the header and footer appear.
- In the Preview section, examine the results and use Preview Page to view different pages of the PDF document.



A. The header appears in the top margin of the page.

B. The footer appears in the bottom margin of the page.

C. Click the Page Range Options... to decide the pages to display header and footer.

3. To apply the settings to multiple documents, click the Apply to Multiple button. In the Add Header and Footer dialog box, click the Add Files... button to add multiple the files, and click OK. In the Output Options dialog box, decide how target folder and files are named.

4. Click OK.

Note: if the file you are processing already contains headers or footers, you are prompted to determine whether to replace the existing ones with the one you are adding. Or, you can choose to add new headers or footers. See Add extra headers and footers.

Update the headers and footers

You can use Update Header and Footer to change settings of the headers or footers that already exist in the document.

1. Open a PDF file that contains a header and footer.
2. Choose **Document > Header and Footer** . Select **Update…** from the drop-down menu.
3. In the **Add Header and Footer** dialog box, change the settings as needed. Then click **OK**. Updates will only apply to the current document.

Remove all headers and footers

Permanently remove all headers and footers from a document.

1. Close all document windows.
2. Choose Document > Header and Footer > Remove….
3. Click OK.

Note: to delete headers and footers in multiple files, you can first choose Home tab and then Document > Header and Footer > Remove….

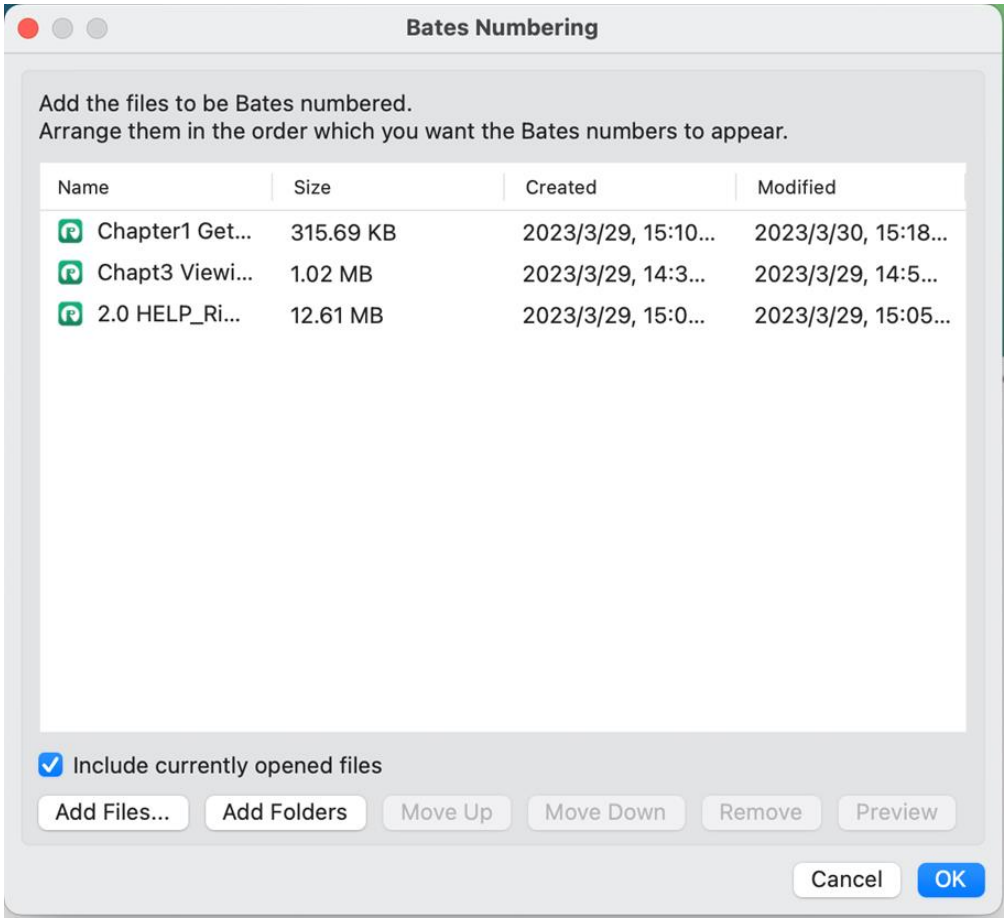
Add a Bates numbering to header or footer

Bates numbering is a way of indexing legal document for you to better identify each page in a set of documents. Each page is assigned a unique Bates number (normally starting from 000001 by default) that indicates its relationship to other Bates-numbered documents, based on the order in which the files are listed in the Bates Numbering dialog box. You are free to change the order in which the Bates numbers are assigned using the Move Up/Down buttons or by sorting the list.

Bates numbers are similar to headers or footers on the pages of each PDF document in the batch. You can also include a prefix and/or a suffix as supplementary information.

Add Bates numbering

1. Open a PDF and choose Document > Bates Numbering. Select Add... from the drop-down menu.
2. In the Bates Numbering dialog box, click Add Files.../Add Folders and locate the files or folders on which bates numbers will appear. If any files are password-protected, there will be one or more messages popping up where you have to enter the correct password to proceed the operation.



Files added to be Bates numbered in batch

3. As needed, do the following to change the order in which Bates numbers are assigned:
    - **Move Up.** Select a file and click the Move up button to move it upward.
    - **Move Down.** Select a file and click Move down to move it downward.
    - **Remove.** Select a file and click the Remove button.
    - **Preview.** Click to preview the selected files in a pop-up Preview dialog box.
    - **Sort:** click on a column heading to change the sort order.
4. After files are added and sorted as needed, click OK. In the Output Options dialog box that follows, specify a target folder and a file naming method for output files. Set the options as needed and click OK.
5. The Bates Numbering dialog box appears. Click inside the box to place an insertion point.
6. To edit text to display as Bates numbers, click the Settings... button and do any of the following in the Bates Numbering Options dialog box. Then click OK to go back to the Add Header and Footer dialog box:

- Click Number of Digits and specify how many digits make up the Bates number, ranging from 1 through 15. The default digit is 6, which forms Bates number such as 000001, 000002, and so on.
- Click Start Number and enter the number to appear on the first PDF in a batch. The default number is 1, meaning the Bates number on the first page of the first PDF will be 000001.
- Click Prefix and type any text to appear before the Bates number.
- Click Suffix and type any text to appear after the Bates number.

7. Click on Insert Macro.
8. Adjust header and footer settings and check how the Bates numbers will appear on pages in the Preview section below.
9. Click OK.

Note: Bates numbering is against documents that are secured or contain digital signatures.

Remove Bates numbering

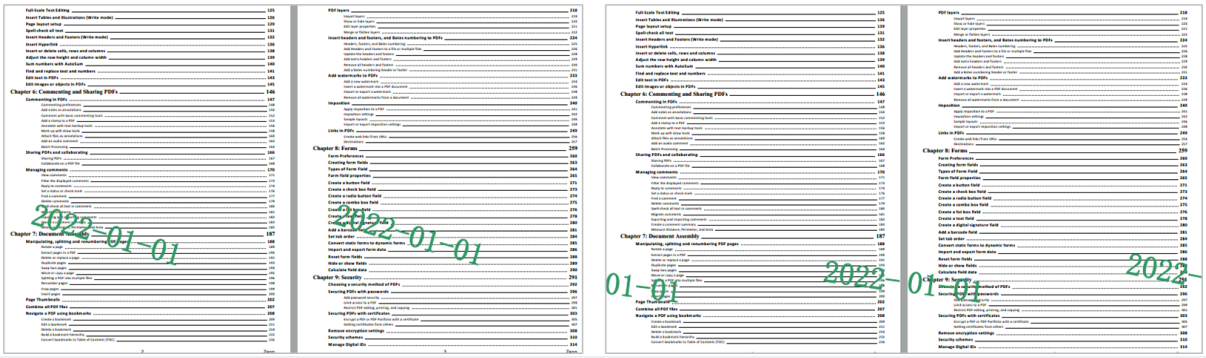
1. Open a PDF file that contains Bates numbers.
2. Choose Document > Bates Numbering. Select Remove... from the drop-down menu.
3. Click OK.

Add watermarks to PDFs

The Watermarks tool lets you insert predefined or custom watermarks to all pages or a selection of pages in the PDF document. Watermarks can be text (e.g. page number, date and time, or information), an image (e.g. company logo), or a composite (a combination of existing watermarks). You can also apply a page of an existing PDF document as a watermark to a PDF document. The watermarks you create can be saved and reused. Not only can you import and export watermarks to share them with others, but also specify whether you want to place the watermark in the background of the PDF, underneath the other page content, or on the top of the page content.

To add a new watermark into Watermark panel

1. Open a PDF file and do either of the following to open the Watermarks panel:
    - Choose Document > Watermarks.
    - On the Sidebar Navigation pane, click the Watermarks icon.
2. To create a watermark, do any of the following:
    - Click the Create... button at the top of the Watermarks panel.
    - Click the Options button at the top of the Watermarks panel and select New from the options.
    - Right-click anywhere in the panel and select New from the options.
3. In the Create Watermark dialog box, click the Title field and name the watermark.
4. Select a type of watermark from the Type drop-down menu:
    - Text. Type the watermark text and/or select preset items from the Macros menu. Click the add button  to the left of each item to insert into the Text field. Adjust the text formatting options as needed, such as font, size, angle and style.
    - Image. A watermark can be an image or a specified page of a PDF file. Click Browse... to locate an image or a PDF file. When a multipage PDF file is chosen, specify one page to be used. Fix or release the aspect ratio. Select Cover whole page to cover the whole page with the image. If deselected, you can define the size and the location for the image.
    - Composite. You can build a new watermark using the existing ones. Select the desired ones and click Add to place them in the box. Click OK.
5. Check Cross-pages watermark to make the watermark appear split across 2 pages or the edges of all pages.
6. Click OK.



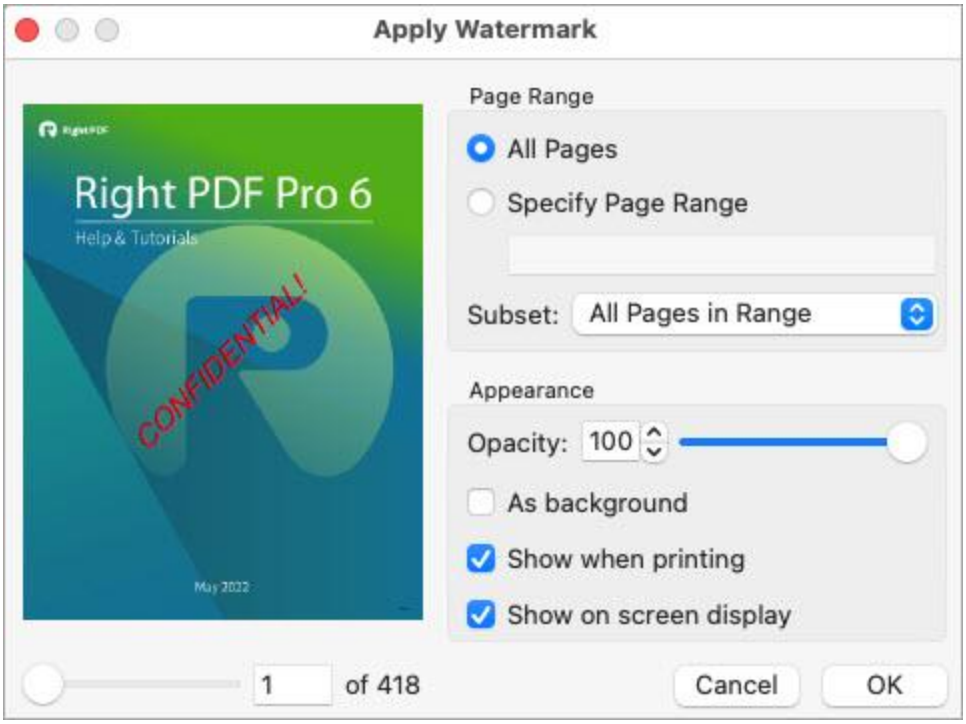
Cross-pages watermark deselected (Left). Cross-pages watermark selected: the watermark appears split across two consecutive pages. (Right)

Edit a watermark

1. Open the Watermarks panel and do either of the following:
    - Right-click on a watermark and select Edit from the options.
    - Select a watermark you want to make changes to, click on the Options button and select Edit from the options.
2. In the Edit Watermark dialog box, make changes to settings as needed and Click OK.

Insert a watermark into a PDF document

1. In the Watermarks panel, do either of the following:
    - Select a watermark from the list of watermarks. Right-click on it and select Apply or click on Options and select Apply.
    - Double-click the watermark.
    - Directly drag the selected watermark to the document pane.
2. In the Apply Watermark dialog box, specify the pages on which the watermark displays. Select Specify Page Range and enter a page range in the field below. Then choose a Subset option from its drop-down menu.



Watermark settings and a preview of the result document with watermark added

3. In the Appearance section, adjust the opacity of the watermark and select the following as needed:
    - Check As background to place the watermark in the background of the PDF file underneath other page content. If deselected, the watermark is placed at the top of the page content.
    - To specify when the watermark displays: check Show when printing and Show on screen display.
4. Click OK.

Import or export a watermark

To Import watermarks

1. Click the Options button and select Import from the options menu.
2. Locate a GWM watermark file and click Open.

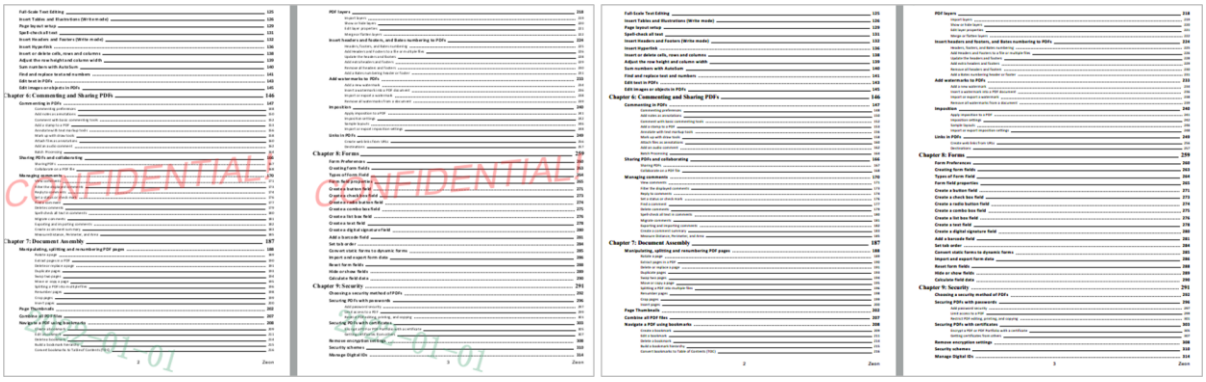
To export watermarks

1. Do either or the following to open the Watermarks panel:
    - Choose Document > Watermarks.
    - On the Sidebar Navigation pane, click the Watermarks icon.
2. Click the Options button and select Export from the options menu.
3. Select a path to save the exported watermarks as a single PDF file. Click OK. All watermarks are exported and saved as a GWM file.

Remove all watermarks from a document

You can permanently remove all watermarks in the document.

1. Open a PDF file containing watermarks.
2. Choose Document > Remove Watermark.
3. Click OK.



Use the Remove Watermark feature to permanently remove all watermarks in the document.

Imposition

Apply imposition to a PDF

In the prepress printing process, Imposition serves to ensure layout and sheet arrangement are correct prior to printing. It's helpful when you want to combine multiple pages into one page or in booklet format.

Apply imposition to a PDF

You can apply imposition to a PDF document and ensure that it prints according to the settings in the Imposition dialog box. The imposition settings of the last session are retained so that you can adjust them based on the resulting document, without having to go through configuration again.

1. Open a PDF file with Right PDF and choose **Document > Imposition**  .
2. In the **Imposition** dialog box, click the tabs to make necessary changes to the Layout, Media, and Options settings (A). See Imposition settings.
3. (Optional) To save the settings, click **Save Settings…**. To import settings, click **Load Settings…**. See Import or export imposition settings.
4. Click **OK**. The imposed file opens in a new window.

Imposition settings

The Imposition dialog box contains three tabs, Layout, Media and Options. You can export and save the current imposition settings (*.ini) for re-use.

Layout

- **Layout**. in the **Layout** section, from the **Type** drop-down menu, select one of the following:
    - **2-Up Booklet.** Place two pages side-by-side on a sheet.

- **4-Up Booklet.** Place two pages side-by-side and below them two more side-by-side pages per sheet. On average, there are four pages per sheet.
- **8-Up Booklet.** Place four pages side-by-side and below them two more side-by-side pages per sheet. On average, there are eight pages per sheet.
- **Cut Stacks.** You can determine how many columns and rows to appear in the resulting document. Specify a custom number of pages per sheet and their arrangement by defining columns and rows. It stacks the printed sheets on top of each other and cuts them to different stacks. Then the stacks are piled from left to right and each pile is bound as a booklet.
- **Sequential**. Select to arrange the original PDF document by page numbers.
- **Step and Repeat.** Select to print each page of the document on a separate sheet. You can specify the number of copies by setting the Columns and Rows values.

- **Gutters.** In the **Gutters** section, select a unit (pt, in, mm or cm) and do the following:
  - **Vertical.** Define the space between two pages placed side-by-side.
  - **Horizontal**. Define the space between rows of pages. This option is not available when 2-Up Booklet is selected as the type of page layout.
  - **Spread**. Define the space between the second and the third pages. This option is available only when 8-Up Booklet is selected.
  - **Creep**. Adjust the page layout of inner spreads to maintain a constant outer margin when a saddle stitched booklet is trimmed to counteract creep. There are 3 factors that determine the creep value: the size of the margins, number of pages, and the thickness of the media.
- **Binding.** In the **Binding** section, select a binding method from the **Type** drop-down menu:
  - **Saddle-Stitching.** This staples the printed media in the spine during folding.
  - **Perfect Binding.** It binds each stack with Saddle-Stitching and glues them all together to generate a booklet. You need to specify the number of stacks per fold field.
- **To determine the printing order**
  - In the **Printing Order** section, select a printing order from the **Style** drop-down menu. The **Style** option is available only when you choose **4-Up Booklet** or **8-Up Booklet** layout:
    - **Sheet-Wise.** This prints one side with one plate, and then turns the media over and prints the other side with another plate using the same gripper and opposite side guide. This option is available only when 4-Up Booklet or 8-Up Booklet is selected.

        - **Work and Tumble.** This prints one side of a sheet and then turns it over from gripper to back with the same side guide and plate to print the other side. This option is available only when 4-Up Booklet or 8-Up Booklet is selected.
        - **Work and Turn.** This prints one side and then turns it over from left to right to print the other side using the same edge of the media as gripper or lead edge and using the same plate set for both sides. This option is available only when 8-Up Booklets is selected.
    - Select **Double-Side** to print both sides of the medium. This option is available only when a non-booklet layout is selected.

Media

- **Media.** In the **Media** group, do the following as needed:
    - **Autosize Media.** This prints the imposition file to the medium that best fits the page size.
    - **Fit to media size.** This prints the imposition file to the medium you specify. You can select a standardized medium (A0 through A4, B4, B5, Executive, Ledger, Legal, Letter, Screen, or Tabloid) or a custom media. To add a custom media, click **Add…** and in the **Custom Media** dialog box, name the medium and define its width and height. Then, click **OK** to add the custom medium to the list. It can be edited or removed.
    - **Auto Rotate.** This allows the imposition file to be rotated to better fit the selected size.
- **Scaling**. Set **Horizontal** and **Vertical** scaling for the page content.
- **Margin**. Define margin values, which include Left, Right, Top and Bottom. You may also choose another unit.

Options

In **Options**, add crop marks to show where pages should be cut, or registration marks to help printers to align pages correctly. You can also adjust double-sided printing settings and more options as needed.

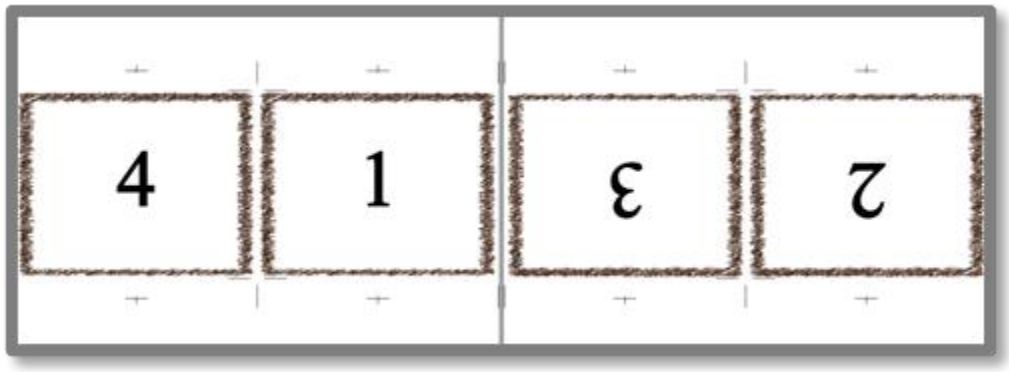
- **Add Printer's Marks.** In the **Printer's Marks** section, do the following:

    - In the **Crop Marks** section, select **Crop Marks** to add crop marks to the resulting imposition file and do the following:
        - **Inner Marks.** This adds crop marks to the blank space next to the spine.
        - **Crop Marks Style.** Choose to make crop marks single-lined or double-lined.
    - In the **Registration Marks** section, check **Registration Marks** to add these to the file and then select a style.
    - Check **Description** to add notes (e.g. Fold: 1, Sheet: 1) to the medium margin when printed.
- **Page Setting. Select Scale Large Pages to ensure all pages of the original PDF file have the same size on a medium sheet. If the original PDF pages are of different sizes, all of them will be adjusted to fit to the first page when printed.**
- **Double sided printing.** In the **Double sided printing** section, select an option and then decide whether to flip backs of sheet before printing:
    - **Interleave document** (front, back, front, back). This prints the front sides and then the back side of a medium before moving on to the next medium.
    - **Fronts first, then backs**. This prints the front sides of all media and prints their back sides in the same order.
    - **Fronts first, then backs reversed**. This prints the front sides of all media and then prints their back sides in the reverse order.
    - **Flip backs of sheets**. Check to rotate the media 180 degrees before printing the back.

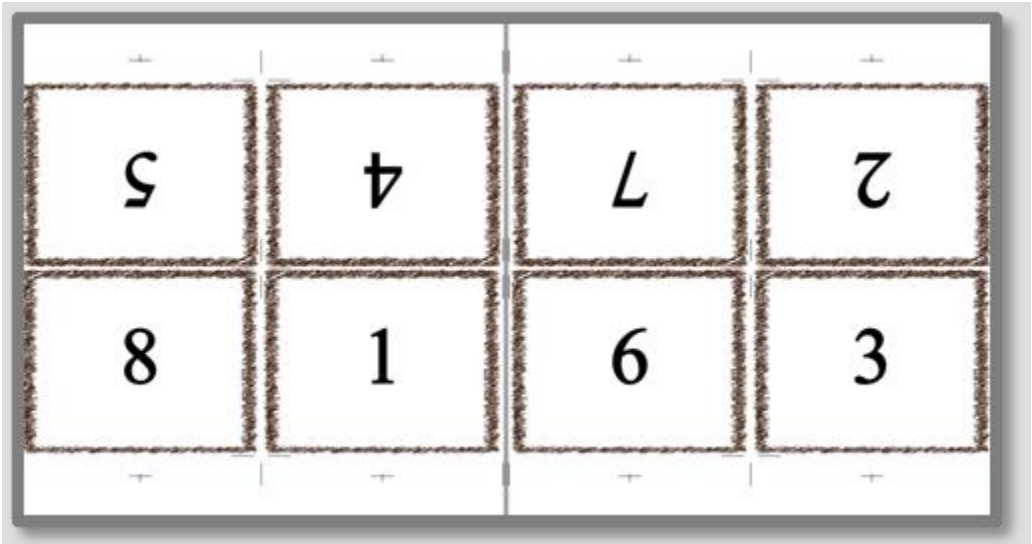
Sample layouts

Booklet layouts

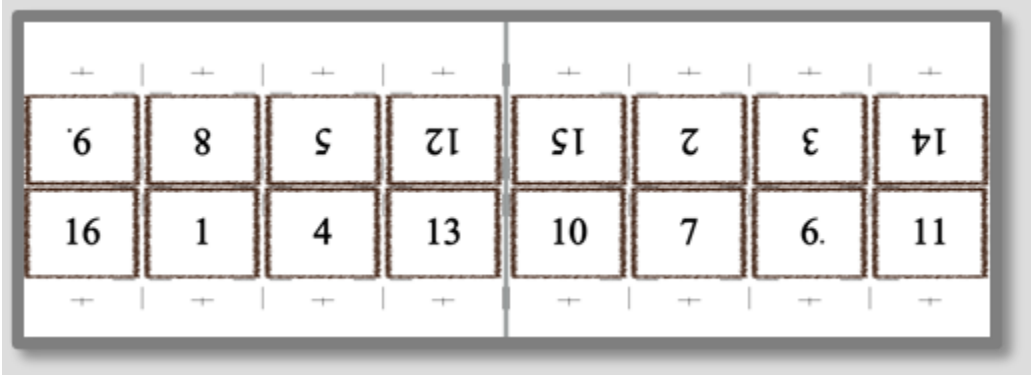
You can generate an imposition file in 2-Up, 4-Up, or 8-Up booklet layout with different binding, printing order, and double-sided printing methods. See the sample layouts below:



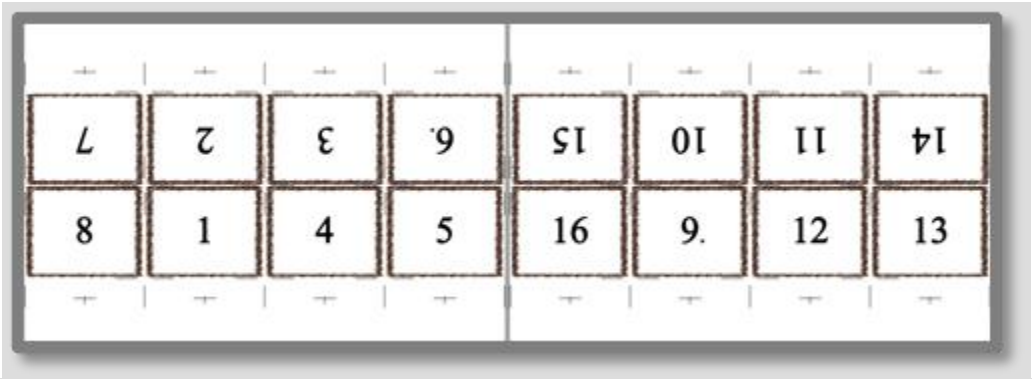
2-Up Booklet, Saddle-Stitching, Fronts first, then backs, Flip backs of sheets



4-Up Booklet, Perfect Binding, Sheet-Wise, Interleave, Flip backs of sheets



8-Up booklet, Saddle-Stitching, Sheet-Wise, Interleave, Flip backs of sheets

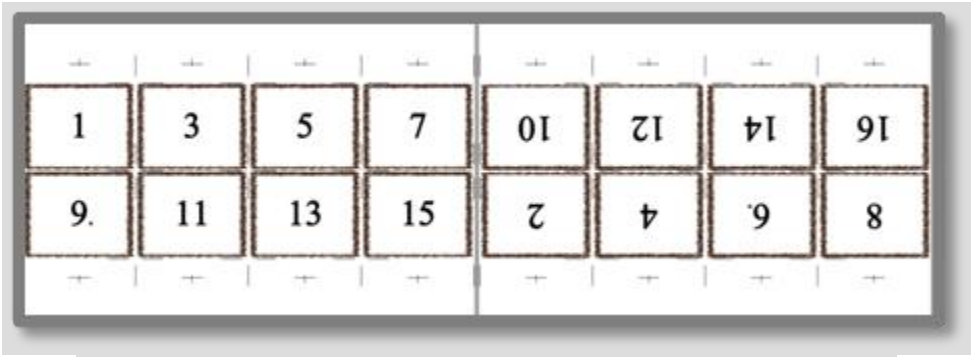


8-Up Booklet, Perfect Binding, Work and Tumble, Fronts first, then backs, do not Flip backs of sheets

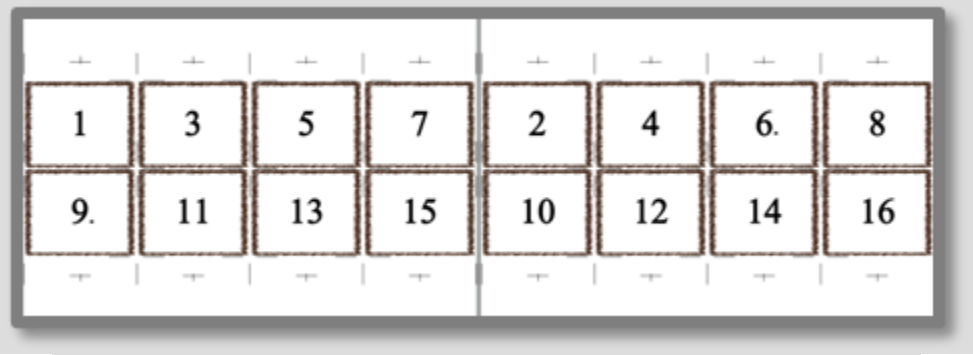
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Non-booklet layouts

Cut Stacks with 4 columns and 2 rows

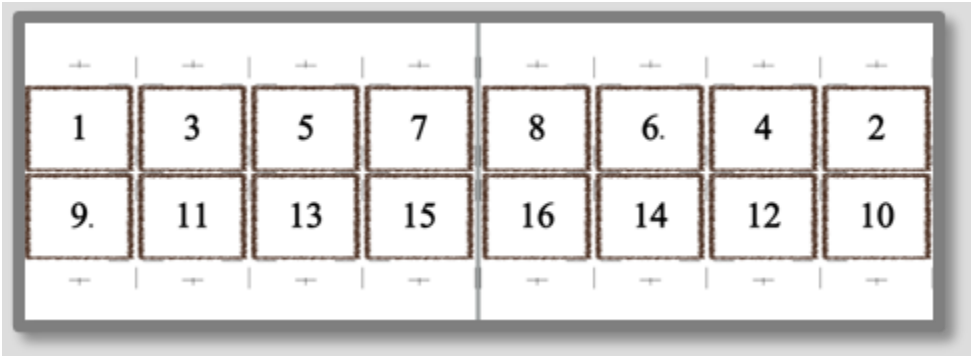


Cut Stacks, Double-sided, Interleave, Flip backs of sheets

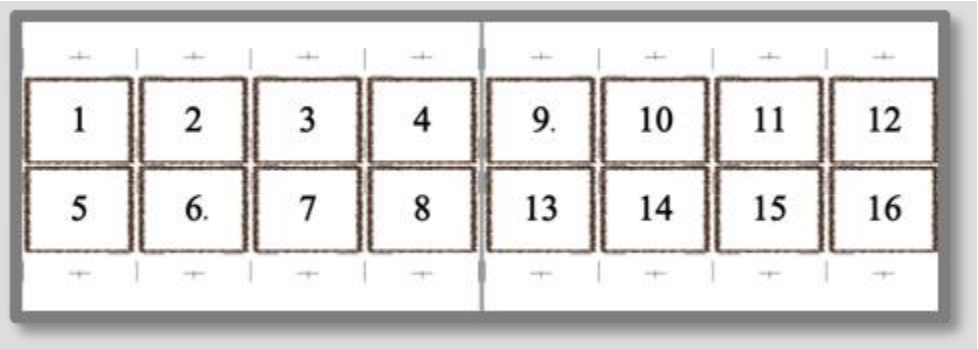


Cut Stacks, not double-sided, Interleave, Flip backs of sheets

Sequential with 4 columns and 2 rows

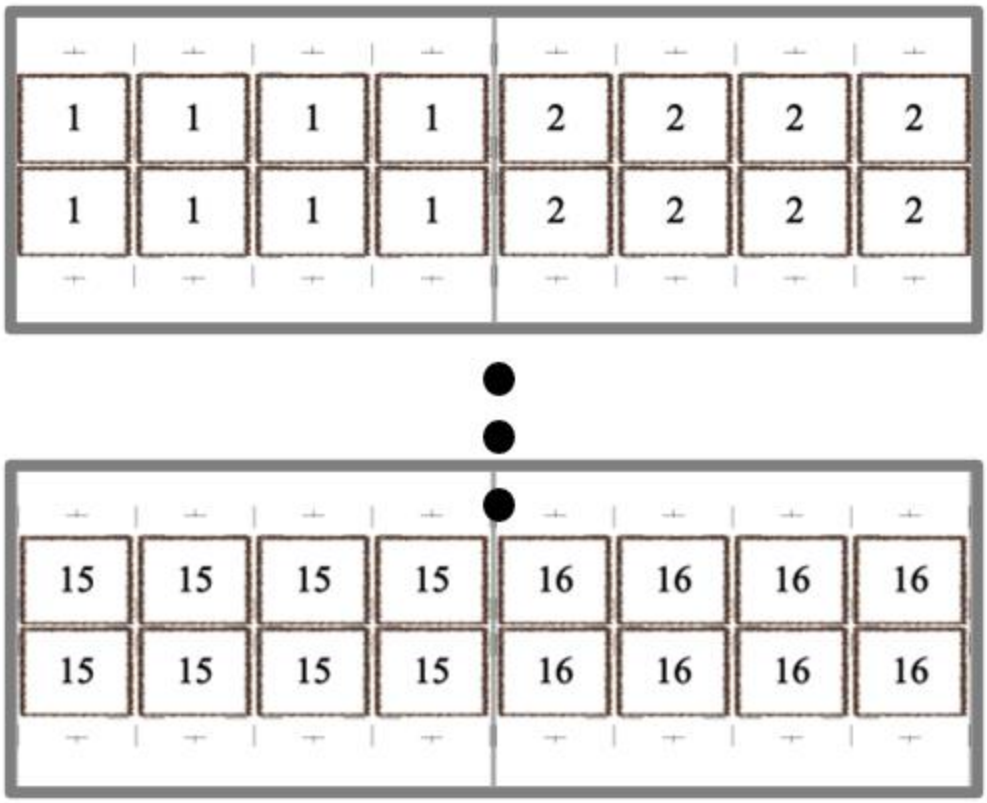


Sequential, Double-sided, Fronts first then backs, do not flip backs of sheets



Sequential, not double-sided, Fronts first then back reversed, Flip backs of sheets

Step and Repeat



Import or export imposition settings

To import imposition settings for the active PDF document

1. Choose **Document > Imposition** .
2. In the **Imposition** dialog box, click the **Load Settings…** button and the **Load Settings…** dialog box appears.
3. In the dialog box, choose an Imposition Data (*.ini) file and click **Open**.
4. Use the imported imposition settings or make any changes if needed.

To export imposition settings

You can save the current imposition settings for re-use.

1. Choose **Document > Imposition** .

2. In the **Imposition** dialog box, click the **Save Settings**
3. In the **Save Settings**… dialog box, specify the file name and path and click **Save**.

Note: in an Imposition file created from a PDF document, comments are ignored.

Links in PDFs

Create a link

Links take you to another location in the same document, another document, or a website.

Create a link

To add a link to a PDF document

1. Open a PDF file on which you want to create a link and choose Document > Link.
2. Click and drag a rectangle to create a link.
3. In the Create Link dialog box, set the desired link appearance.
4. Select an action in the Action section:
    - If you select Go to a page view, the link will lead you to a specific page view within the same document or in another document (such as a file attachment). (1) Click Next and the Create Go to View dialog box appears, informing you to use the navigation tools to set the view for the link. (2) Go to a page and set a desired viewing magnification in the current document or in another document. (3) Click Set Link to create the link destination.
    - If you select Open a file, clicking the link will open a specified file. Click Next and locate a file to link to. Click Open.
    - If you select Open a web link, it takes you to a specified URL. Click Next and then enter a URL in the field. Click OK.
    - Select Custom link and click Next to open the Link Properties dialog box. The Actions tab offers you a list of available actions you can set for the link, such as executing a menu item.
5. Optionally, you can adjust the position and size of it as you would expect:
    - To move the link rectangle, click-drag it with the Select tool or Link tool.
    - To resize the link rectangle, click-drag any corner or side point with the Select tool or Link tool.
6. To test a link

- On the Sidebar Navigation pane, click the Hand tool or choose Basic > Hand.
- Using the Hand tool, click on the link to see if the link can perform the specified action.

Edit a link

You can not only change link appearance and set the default link style for re-use, but also specify its associated actions, reposition the link rectangle, or edit the destination of the link.

To edit the appearance of links

1. Do either of the following to call out the Link Properties dialog box:
   - Double-click on the link with the Select tool or Link tool.
   - Right-click on the link using either the Select tool or Link tool and select Properties... from the options menu.
2. In the Appearance tab, adjust the settings as needed.

   - **Appearance**

     a. Link Type:
        - Choose Visible Rectangle to let users see the link in the PDF.
        - Choose Invisible Rectangle if you do not want users to see the link in the PDF. It is especially useful if the link is placed over an image.

     b. Highlight Style determines what the link should do when you click on it:
        - Choose Invert to change the link's color to its opposite.
        - Choose Outline to change the link's outline color to it opposite.
        - Choose Inset to display an embossed rectangle.

     c. Line Style: Choose the style of the link frame to be Solid, Dashed or Underline.

     d. Line Thickness: Set the thickness of the link frame to be Thin, Medium or Thick.

     e. Color: Choose a color for the link frame.

     f. Check the Protected box if you want to prevent users from accidentally changing your link settings.

   - **To edit a link action**

In the Actions tab, select the listed action you want to change and click the Edit button.

To set the default link appearance

1. Set a desired link appearance.
2. Right-click on the link that uses the link appearance you want to set as default and select **Set as Default Appearance**. The current style of the link will be set as default.

To align, resize, and reposition links

- **To align links**
    1. Hold down Command and click on each link you want to reposition using either the Link tool or Select tool.
    2. Right-click on the link to which you want to align the other links. If you select right, all the selected links will be aligned to the right edge of the anchor link.
- **To center a link**

    Right-click on the link and select Center. Then choose any of the following:

    - Click Vertically to center the link between the top and bottom margins.
    - Click Horizontally to center the link between the left and right margins.
    - Click Both to place the link at the center of the page.
- **To distribute links evenly**

    You can give a group of links the same spacing, measured from the centers of adjacent links.

    0. You must select at least three links. Command-click to select multiple links.
    1. Right-click on any link in the selection and select Distribute:
        - Click Vertically to evenly distribute links vertically.
        - Click Horizontally to evenly distribute links horizontally.
- **To resize links**

The Width and Height of all selected links will be identical to the anchor link.

0. Hold down Command and click on each link you want to resize.
1. Right-click on the anchor link and select Resize.
    - Click Width to set the width identical to the width of the anchor link.
    - Click Height to set the height identical to the height of the anchor link.
    - Click Both to set both the width and height identical to the anchor link.

Note: 1. To use Align and Size, you need to select at least two links. 2. To use Distribute, you need to select at least three links.

Delete links

To delete one or multiple links

1. Click on the link you want to delete or hold down Command to select multiple links.
2. Press the Delete key on your keyboard or select Basic > Delete to delete them all.

To remove web links

Using the Remove Web Links, you are able to remove all web links or links on certain pages within the document.

1. Choose Document > Remove Web Links. Click Yes in the popup dialog box
2. In the Remove Web Links dialog box, select All, Current Page or specify a page range.
3. Click OK.

Note: Remove Web Links removes only links that link to websites and will not affect other links. The operation cannot be undone, so make sure you would like to proceed it before clicking OK.

Create web links from URLs

Create Links from URLs lets you automatically turn all the URLs within a page range into web links. If you want to make only certain URLs active, you can specify on which pages to create web links.

1. Open the PDF document that contains URLs.
2. Choose Document > Create Links from URLs.
3. A message appears informing you this operation cannot be undone. Click OK to proceed.
4. Specify on which pages you want to generate active web links from URL and then click OK.
5. To test the link, click on the link using the Hand tool and then click OK to go to the specified web page.



Destinations

A destination is the end point of a link that enables you to set navigation paths across a collection of PDFs.

To view destinations

1. Open the PDF in Right PDF.
2. Do either of the following to open the Destinations panel:
    - Choose Document > Destinations.
    - On the Sidebar Navigation pane, click Destinations.

To set a destination

1. Find the place within the document where you want to create a destination and then set the desired view.
2. In the Destinations panel, do either of the following:
    - Click the Create New Destination button and name the destination. The current page view is set as the destination.
    - Click the Destinations Options button and select New Destination. Name the new one and the current page view is set as the destination.
3. To reset a destination, click on the name of the destination, scroll to a page view and then click the Set Destination button. Or you can right-click on the destination in the Destinations panel and select Set Destination from the menu.

To go to a destination

Do either of the following to jump to the destination:

- Double-click on the text representing the destination.
- Right-click on the text representing the destination and then select Go to Destination.

Link to a destination

You can create a link to a destination in the same or another PDF document.

1. Open the target document (destination) that contains a destination you want to link to.
2. Choose Document > Link and then drag a rectangle to specify a location and size of the link.
3. In the Create Link dialog box, set the appearance of the link and select Go to a page view from the Link Action drop-down menu. Click Next.
4. Go to the target document (with the destination). In the Destinations panel, double-click on the destination and click Set Link in the Create Go To View dialog box.
5. Save the source document. To test the link, click on the link using the Hand tool to open the target document view (your destination).

Batch Processing

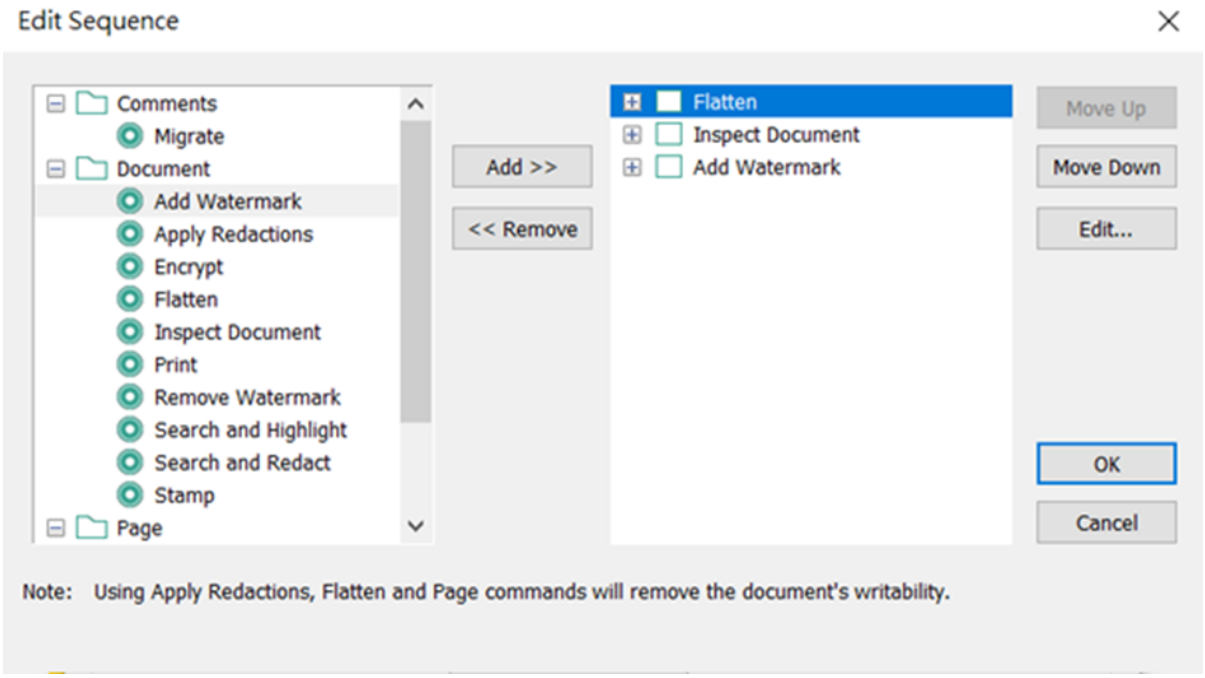
Batch Processing helps you automate repetitive operations involving a collection of selected file. Right PDF provides a set of predefined commands you can choose from to build a custom sequence in which a series of commands is applied to one or more files. It can be useful especially when you want to apply multiple tasks to a long, complex file or a certain command to multiple files.

To create a batch sequence

You can create or edit a command sequence to perform multiple tasks on a collection of selected files at a time. Once the command sequence is complete, you can begin to choose files.

1. Choose **Advanced > Batch Processing**  .
2. In the **Batch Sequence** dialog box, click **New Sequence…** and name the sequence in the pop-up **Name Sequence** dialog box. Click **OK**.

3. Under **Select sequence of commands** of the **Edit Batch Sequence- [Name of the new sequence]** dialog box, click the **Select Commands…** button to call out the **Edit Sequence** dialog box in which you can choose commands from the list to the left for the sequence and then click **OK** to finish:
    - Do either of the following to add commands to the sequence:
        - Double-click a command.
        - Click one command and click the **Add>>** To remove commands from the list, choose one from the list to the right and then click the **<<Remove**
    - **Move Up/ Move Down.** To arrange the sequence, select one and click the **Move up** button to move it upward or the **Move Down** button to move it downward.
    - **Edit…**. Click to change the settings of the selected command. You can either double-click a command or select a command and click the **Edit…** button to change their respective settings.



4. Under **Run commands on,** specify which files or folder the sequence runs on. Select one of the following from the Run commands on drop-down menu:
    - Select **Selected Files** or **Selected Folder**. Click **Browse…** to select files or a folder.
    - **Ask When Sequence is Run.** You will be asked to specify the files or a folder whenever the sequence is activated.
    - **All Open Files.** The sequence runs on all currently opened files in the program.
5. Under **Select output location**, specify an output location and options for File Naming and Output Format.
6. Click **OK** to save the sequence.

Note: by using the **Edit Sequence…** option, you can edit sequence commands or settings anytime as needed.

To run a batch sequence

Run a batch sequence on specified files.

1. Choose Advanced > **Batch Processing** .
2. In the **Batch Sequence** dialog box, highlight one of the listed sequences and click **Edit Sequence…**.
3. In the **Edit Batch Sequence – [Name of the selected sequence]** dialog box, verify the commands and files/folder selected are the ones you want to process. Click **OK**.
4. In the **Batch Sequence** dialog box, click **Run Sequence**.
5. In the **Confirm Running Sequence** dialog box, click the cross icon  to the left of each command to see properties of each command. To edit settings, click Cancel to get back and select **Edit Sequence…**.
6. Click **OK**.
7. When finished, if any errors occur during the process, a Warning and Errors dialog box will appear, listing detailed information.

Note: the Apply Redactions and any Pages commands will remove your document's writability.

Chapter 8: Forms

Forms

Right PDF includes several tools that can be used for creating interactive PDF forms. Using form field tools, you can create interactive PDF forms so that recipients can fill it out with ease. Interactive forms are designed to collect the data you enter into the fields to perform other tasks, such as calculating field values and exporting form data to a specified file format, and more.

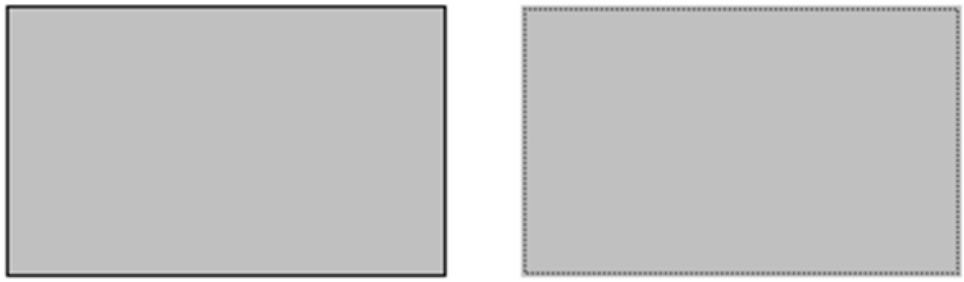
You can also use Recognize Forms feature to transform static forms, non-interactive forms created in Word or other applications, into dynamic forms containing interactive form fields in which you can type text.

Form Preferences

On Menu Bar, choose Right PDF > Preferences…, or press Command + K on your keyboard to show the Preferences dialog box. Choose Forms > Forms from the options menu to the left. Set form preferences:

General

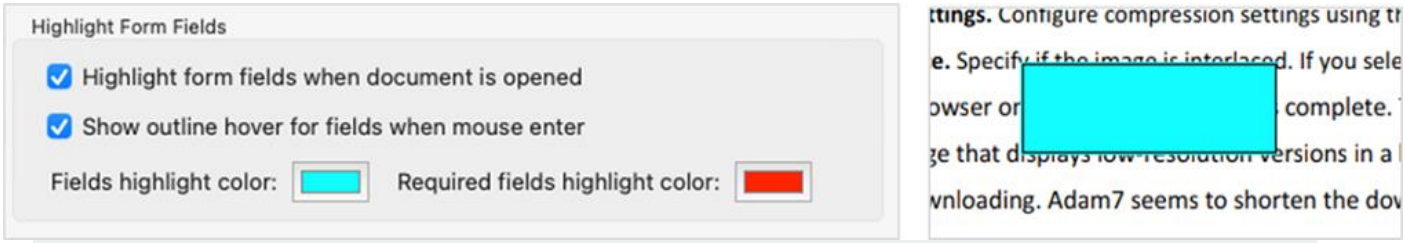
- **Automatically calculate field values:** check this box to enable automatic calculations when data is entered. See Calculate field data for details.
- **Show focus rectangle:** highlight the form field with focus. If the focus is on the current form field, or when your click a button, a check box, a radio button, a list box, or a signature field with the Hand tool, a dotted square appears about it.



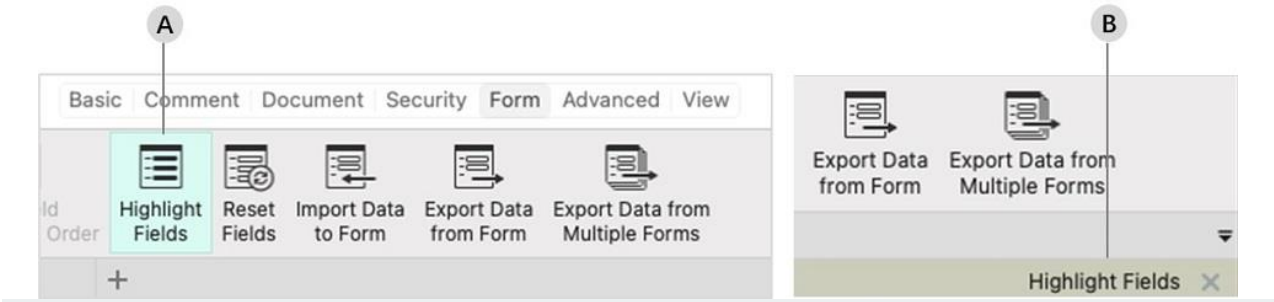
Show focus rectangle selected (Left) Show focus rectangle deselected (Right)

Highlight Form Fields

- Highlight form fields when document is opened. All form fields are automatically highlighted when the document is opened.
- Check Show outline hover for fields when mouse enter to have form fields outlined when a cursor hovers over them.
- Click Fields highlight color, specify a color, and then use the Highlight Fields command to have form fields highlighted in the color you specify. The Highlight Fields command is enclosed in the document message bar or you can choose Form > Advanced > Highlight Form Fields.



Set Fields highlight color in aqua (Left); Use Highlight Fields to highlight form fields in aqua (Right)



Two ways to access Highlight Form Fields: A. Form > Highlight Form Fields B. Document message bar > Highlight Fields

- Click Required fields highlight color and specify an outline color of Required fields. Note that only radio buttons, combo boxes, text fields and signature fields can be set as required fields. Follow the steps to highlight a required item:

  (1) Do either of the following to set a required field:

  - Create a form field and then its Properties dialog box appears. Under the General tab, check Required to make it a required item.
  - Open a PDF file that contains form fields. Double-click a field to show its Properties dialog box. Check Required to make it a required item.

  (2) Choose Right PDF > Preferences… > Forms. Under Highlight Form Fields, click Required fields highlight color and in the color palette, choose a predefined color or define a custom color.

  - Choose Form > Highlight Form Fields.
  - Click Highlight Fields in the Document message bar.

Auto-Complete

If this feature is on, the text field drop-down menu offers you relevant options based on the entries you previously entered, helping you fill out the form quickly. You may check Remember numerical data, which helps storing user entered numeric values. If this option is not selected, then only text options will be provided.

Edit Entry List.... Display current entries in the Auto-complete database. To remove an entry from the list, click one of them and click Remove; to clear the entire list, click Remove all.

Creating PDF forms

Creating PDF forms

Using form creation tools, you can not only create different types of form fields, but also set a variety of attributes and actions for each field type through the field properties dialog box.

To add a form field

1. Open the PDF in which you want form fields to appear.
2. Choose the Form tab and select a form type to add.
3. On the page, drag a rectangle to define the size of the field and then release the mouse button to finish field creation. You can edit its attributes in the pop-up Properties dialog box.

To edit a form field

You can edit a form field in its properties dialog box. Do either of the following:

- The field properties dialog box appears as soon as you release the mouse button to finish creating a form field with a form field tool.
- Double-click the field you want to edit using Select.

To move the fields

You are able to move the fields anywhere on the page in the document pane:

- After the form creation is over, hover the cursor over the newly-created form field to show the four-headed Move pointer. Click-drag to move it anywhere on the page.
- On the Sidebar Navigation pane or through the Basic tab, click Select. Then click-drag to move it using the Select tool.
- To constrain the horizontal or vertical movement as you drag, press and hold the Shift key while dragging the field.
- To move fields in small increments either horizontally or vertically, press the arrow keys on your keyboard to move the selected form field to the position you want.

To copy a form field

You can copy a form field by simply copy-and-paste, but there are two additional ways to do it—**Create Multiple Copies** and **Duplicate Across Pages**. Before you proceed, bear in mind the following rules: (A) form fields cannot be dragged from one page to another, (B) changes made to the properties of a form field will not affect others, (C) all form fields with the same basic name share the same user data and hover text, meaning if you change one you change all.

Copy a form Field

1. Provided you are not in the form editing mode, choose **Select.**
2. Select a form field and do one of the following (You can press and hold **shift** to limit the dragging direction to only vertical or horizontal):
    - Press **Command + C** and **Command +V** to copy it to the center of the current view.
    - Press and hold **Command** and drag it to copy the form field to the location you release the mouse button.
3. If you also wish to copy the data the user enters into the original field, don't change the name; otherwise, rename the field.

Create Multiple Copies

1. Right-click a form field and select **Create Multiple Copies…** from the menu.

2. In the **Create Multiple Copies of Fields** dialog box, first make sure **Preview** is checked, and then move the dialog box around so that the original form field and its copies become visible.
3. You can do the following changes:
    - Use **Copy selected fields down** and **Copy selected fields across** in the **Number of Fields** section to determine how many copies will be created.
    - Adjust the values in **Change Width** and **Change Height** field in the **Overall Size** section to modify the distances between the original field and its copies.
    - Click **Up**, **Down**, **Left** and **Right** buttons to move the original field and all its copies.

Duplicate Across Pages

This feature creates replicas of the original form field and adds them to the same spot on other pages.

1. Click the Select tool to enter Form editing mode.
2. Right-click a form field and select **Duplicate Across Pages**... from the menu. This option is not available in single-page documents.
3. You can do the following in **Duplicate Field** dialog box:
    - Select **All** to duplicate the form field on all pages. Click **OK**.
    - Select **From** and enter the start and ending pages on which you want the duplicate to appear. Click **OK**.
4. If you also wish to copy the data the user enters into the original field to all fields, don't change their name; otherwise, rename them.

Form field properties

How a form field behaves is determined by the form field properties you set in the Properties dialog box for individual fields, depending on the type of form field. You can configure its general field attributes, such as line style, text font, determine actions to be associated with the form fields, set data formatting,and more. Take buttons as an example. You decide its appearance, and how it reacts when triggered. For text fields, you can set up text alignment, text display, actions, data formatting, validation, and calculation.

You can find these two options in each tab:

- **Protected**. Select to lock the form field and prevent any edits.
- **Close**. Close the form field properties dialog box. If you want to edit the properties of multiple form fields, you can keep the current dialog open and click another form field to change its properties.

*If you select **Protected** in any tab, options in all tabs will be locked.

General

The General tab appears for all types of form fields and includes the following options.

- **Field Name.** Give the form field a unique name.
- **Hover Text.** The text you enter displays when the pointer hovers over the form field.
- **Orientation.** Rotate the form field by 0, 90, 180, or 270 degrees.
- **Attributes.** Specify the text color, line style, line thickness, font and the color used to fill and outline the selected form filed.
- **Visible.** Check to make the selected form field always visible on screen.
- **Print.** Check to make the selected form field visible in print.
- **Read Only.** Check to prevent others from making any changes to the form field content.
- **Required.** Require the users to fill in the selected form field. If the required field is left blank when you attempt to submit the form, an error message appears and the empty required field is highlighted. Also, you can set a special color to highlight the required form fields in the Preference dialog box.

Options

The Options tab appears for all type of form fields except digital signatures. The options available within the tab vary depending on the type of form field selected.

- **Radio Button.** You can create a group of radio buttons to have users select only one choice among a set of choices.
    - **Radio Button Style.** Specify the icon that appears when the radio button field is selected. Choose a shape of marker from the list: check, circle (default), cross, diamond, square, or star. The setting does not affect the shape of the radio button form field itself.
    - **Export Value.** Define the value that represents the field if the form data will be exported.
    - **Button is checked by default.** Check to make the radio button field selected when users first open the form.
    - **Buttons with the same name and value are selected in unison.** Enable one click to select multiple related radio buttons. For instance, if you select a radio button which has the same field name and selection state as others, all are selected.
- **Check Box**
    - **Check Box Style.** Specify the icon that appears when the check box field is selected. Choose a shape of marker from the list: check (default), circle, cross, diamond, square, or star. The setting does not affect the shape of the check box form field itself.

      Note: The size of the check mark inside the check box is determined by the font size you specify in General tab.

    - **Export Value.** Define the value that represents the item if the form will be exported.
    - **Check box is checked by default.** If this option is selected, the check box remains checked even if Reset Form Fields is used to clean up all field entries. If this option is not selected, the check box becomes unchecked when you use Reset For Fields to remove field entries.
- **Combo box and List box**
    - **Item.** Type text for options used to appear in the menu for the field. Click 

to add the text to the item list on the right-hand side.
    - **Export Value.** The value you specify represents the item if the data will be exported. If the field is left blank, it uses Item as the export value.
    - **Item List.** This displays all the options available in the list. The highlighted item in the list appears as the default selected item in the list or combo box. You can change the default item by highlighting another item from the item list.

- **Sort Items.** Select to enable rearranging the listed items numerically and alphabetically. If there are numbers, a numerical sort is performed before an alphabetical sort.
- **Multiple Selection (List boxes only).** Select this to enable users to select more than one option. Command-click to make multiple selections.
- **Allow user to enter custom text (Combo box only).** Select to enable users to enter a value besides the ones already available in the list.
- **Commit selected value immediately.** Select to enable saving the value right away after the item is selected. If deselected, the data is saved only when you click on another form field or anywhere out of the current field. This option is not available when Multiple Selection is selected.

- **Text Field**
  - **Alignment.** Align the text left, right or center within the selected text field.
  - **Default Value.** Specify the text which appears in the text field by default until others make changes to it by typing in the field.
  - **Multi-line.** Select to allow more than a single line in the text field.
  - **Scroll long text.** Select to enable typing without length restrictions. You can scroll to view everything typed in the text field. This is not available if you select Auto from the Font Size drop-down menu under the General tab.
  - **Limit of ____ characters.** Define the maximum number of characters to be entered into the text field.
  - **Password. Display all user-defined entries as a series of asterisks (*).** This option is available only when Multi-line is not selected.
  - **Comb of ____ characters.** It evenly spreads all user-entered text across the width of the text field. For example, if you enter 5, the field is evenly divided into 5 boxes with only one character allowed to be entered into each box. This option is available only when no other checkbox is elected.

Position

- **Units**. Select a unit.

- **Position**. Determine the position or size the currently selected field or fields. The **Height** and **Width** options are used to adjust the size of fields, while the rest are used to change their position.
- **Do not change height and width when changing the position**. Check to move fields without resizing them.

Actions

You can specify any actions associated with the selected form field, such as go to a page view, open a file, reset a form, or show/hide field(s). All types of form fields include the Actions tab and the following options:

- **Select Trigger.** Specify the user action that launches the action associated with the field: Mouse Up, Mouse Down, Mouse Enter, Mouse Exit, On Focus, or On Blur.
- **Select Action.** Specify the event occurring when the user triggers the action: Execute a menu item, Go to a 3D view, Go to a page view, Import form data, Multimedia Operation, Open a file, Open a web link, Play a sound, Play Media (PDF 1.4 Compatible), Play Media (PDF 1.5 and later Compatible), Reset a form, Run a JavaScript, Show/Hide field(s), and Submit a form.
- **Do Action.** All triggers and actions are listed here.
- **Add....** Click to open the widow where you configure settings for the selected action.
- **Delete.** Click to remove the selected trigger-action pair from the Do Action list.
- **Edit.** Make changes to the selected action. Select an action from the Do Action list and click Edit to open a dialog box with specific options for the selected action.
- **Up and down buttons.** Rearrange the actions listed under the same trigger. The buttons are available only when there are multiple actions for the same trigger.

Format

The Format tab in the properties dialog box only appears for combo box fields or text fields.

- **None.** This means the input in a combo box or text field doesn't require any specific formatting.

- Number
    - Style. Specify the placement of periods and commas.
    - Currency. Set the type of currency, such as Dollar, Pound, or Yen.
    - Decimal. Define the number of digits that appear to the right of the decimal point.
    - Symbol Location. Decide where to put the specified currency symbol in relation to the number. This field is available only when a currency symbol is selected.
    - Negative. Decide how negative numbers are displayed. Choose Show Red, Show Parentheses, Both, or Neither.
- Date. Decide how to display the date. The drop-down menu provides variations you can choose from: m means month, d means day, and y means year.
- Time. Decide how to display the time. H means the hour on a 24-hour clock, MM means minutes, h means the hour on 12-hour clock, ss means the seconds, and tt means am or pm.
- Special
    - Zip Code. This option is for entering a five-digit U.S. postal code.
    - Zip Code + 4. This option is for entering a nine-digit U.S. postal code.
    - Phone Number. This option is for entering a ten-digit telephone number.
    - Social Security Number. This option is for entering a nine-digit U.S. Social Security Number. Hyphens are inserted automatically after the third digit and the fifth digit.
- Arbitrary Mask. It changes the format category to custom and makes another text field available, in which you can type a custom format. Use this option to specify which types of characters the user can enter in any given position, and how the data displays in the field.
    - A accepts only letters (A-Z. a-z).
    - X accepts spaces and most printable characters, including all characters available on a standard keyboard and ANSI characters in the ranges of 32-126 and 128-255.
    - The letter "O" accepts alphanumeric characters (A-Z. a-z, and 0-9)
    - 9 accepts only numeric characters (0-9). For example, a mask setting of AAA--p#999 accepts the input BOE--p#767.
- Custom. This is the section where you can enter custom JavaScript for formatting and keystrokes.
    - Keystroke Script. The setting box displays custom JavaScript you have added to validate keystrokes. You can click the Edit... button to open the JavaScript Editor dialog box in which you can edit or write new scripts.

- **Format Script.** The settings box displays custom JavaScript you have added for formats. You can click Edit... to open the JavaScript Editor dialog box in which you can edit or write new scripts.

Validate

The Validate tab, available only for combo boxes and text fields, restricts entries to specified ranges, characters, or values.

- **Validate field value.** Check to turn on validation.
- **Field value is From ____ To _____.** Set a numeric range for form fields. This option is available only when you select Number in Format tab.
- **Run custom validation script.** Validate using the JavaScript you create or provide. Click Edit... to create and edit JavaScript.

Calculate

The Calculate tab, available only for combo boxes and text fields, provides options you can use to perform mathematical operations on existing form field entries and report the result.

- **As the sum(+) of selected fields.** Add selected fields. Click the Pick … button to the right of the dialog box to start selecting fields.
- **As the product(X) of selected fields.** Multiply selected fields. Click the Pick … button to the right of the dialog box to start selecting fields.
- **As the average of selected fields.** Calculate the average of selected fields. Click the Pick … button to the right of the dialog box to start selecting fields.
- **As the minimum of selected fields.** Get the minimum of the numbers entered. Click the Pick … button to the right of the dialog box to start selecting fields.
- **As the maximum of selected fields.** Get the maximum of the numbers entered. Click the Pick … button to the right of the dialog box to start selecting fields.

- **Using simplified field notation.** This uses JavaScript which contain field names and arithmetic signs. Click the Edit... button to open the JavaScript Editor dialog box in which you can edit or add new scripts.
- **Using custom calculation script.** This uses any custom JavaScript you have added for calculations. Click the Edit... button to open the JavaScript Editor dialog box in which you can edit or add new scripts.
- **Value is not calculated.** The value of the selected form field is not involved in the calculation.
- **As the sum/product/average/minimum/maximum of selected fields.** It calculates the sum/product/average/minimum/maximum of the selected fields. Click Pick… to select the fields for calculation.

Signatures

The Sign tab, available for digital signature fields only, lets you decide what happens when a digital signature is applied to the form.

- **Do nothing when signed.** Nothing happens when the field is signed. All fields are still available.
- **Marked "All fields" as read-only.** All fields in the current PDF document become read-only (locked) after the digital signature field is signed.
- **Marked "All fields except followings" as read-only.** Only the selected fields are available after the digital signature field is signed.
- **Marked "Just these fields" as read-only.** The selected fields will be locked. You cannot make any changes to the selected fields after the digital signature field is signed.
- **Execute following script when signed.** Activate a custom JavaScript when the form is digitally signed. Click Edit... to edit or create a new JavaScript action.

Value

The Value tab is available for barcode fields only.

- **Encode using.** Select a format, either Tab Delimited or XML, from the drop-down menu. Then click Pick... and select the fields you wish to be encoded in the barcode field.
- **Include field names.** Include the field names in the barcode data. If you do not want to include the field names, uncheck it.
- **Custom calculation script.** This displays the default script. Click the Edit... button to open the JavaScript Editor dialog box in which you can edit or add your custom scripts for the barcode.
- **Reference to published form.** It shows the path to the PDF form. You are allowed to edit this by typing in information in the field. The URL reference is encoded into the barcode and displayed on the form below the barcode if you choose to encode the barcode field using XML values.

Types of Form Field

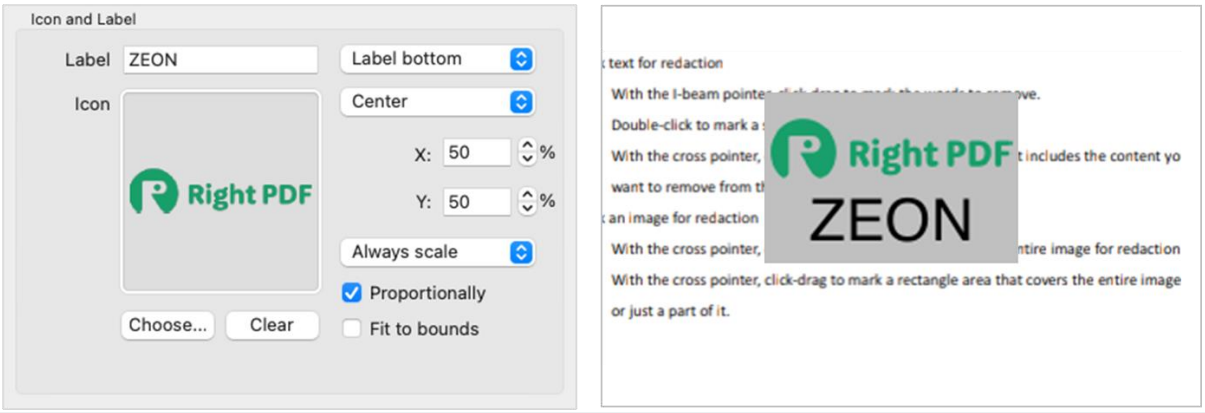
Create a button field

Right PDF provides you with several form tools to create different types of fields. To create a field, select the tool depending on the type of field you want and then drag a rectangle where you want to add the field.

Create a button field

Button is the most broadly used field type of all the field types and can be formatted to perform a variety of tasks, such as clearing form data, submitting a form, opening a new link, playing a sound, and more. In addition, since Image Field is just an extension of Button, this guide will not elaborate on it.

1. Open a PDF and choose **Form > Button** .
2. On the page, drag a rectangle where you want the field to appear. To call out the **Button Properties** dialog box, do any of the following:
    - The dialog box appears automatically right after the field is created.
    - Or on the Sidebar Navigation pane or under the **Basic** tab, click **Select** and use it to double-click the field.
3. In **General**, name the field and set its button attributes.
4. In **Options**, edit the following settings:
    - Click **Behavior** and decide how the button behaves when it is activated by the mouse action you specify in the **State** field.
    - In the **Icon and Label** section, define an image or text to appear in the button. You can have Label only (text only), Icon only (image only), or both (text and icon) in a button. Choose an appropriate option from the drop-down menu right next to the Label field.



Have both text and an icon displayed in the button: Place the text at the bottom and the icon at the center, and adjust its size. (Left) The result (Right)

5. In **Actions**, specify options to determine what happens when the button is clicked. The Action tab offers the following settings:
    - **Select Trigger**. Define how the user initiates an action, including Mouse Up, Mouse Down, Mouse Enter, Mouse Exit, On Focus, and On Blur. For example, if you select Mouse Up, the action occurs as soon as you release the mouse.
    - **Select Action.** Specify the task the button performs when the user triggers the action. Select an action from the Select Action drop-down menu and click the Add... button to open a window for the selected action.
    - The **Do Action** setting box displays the list of triggers and actions you defined for the button.
        - Click **Delete** to remove the selected action from the Do Action list.
        - Click **Edit** to change the settings for the selected action.
        - Use **Up/Down** buttons to change the order of the selected action listed under the same trigger. The buttons are available only when there are multiple actions placed under the same trigger.

Create a check box field

Use Check Box if you want recipients to select one or more options at the same time. In some cases, if you want to select a check box and make a group of check boxes all checked, you can give the group the same field name to have all of them perform the specified action.

1. Open the PDF file where you want form fields to appear. Choose **Form > Check Box**.

2. On the page, drag a rectangle to specify the size and location of the form. To call out the **Check Box Properties** dialog box, do any of the following:
    - The dialog box appears automatically right after the field is created.
    - Or on the Sidebar navigation pane or under the **Basic** tab, click **Select** and then use it to double-click the field.
3. In **General**, name the field and set its box attributes as needed.
4. In **Options**, edit the following settings:
    - In the **Check Box Style** section, select a desired field style for the check box appearance.
    - Click **Export Value** and specify a value that represents the item if the form data will be exported. The defined export value appears in the resulting data file if the check box field is selected. If deselected, it shows **Off** indicating the item is not selected.
    - Check **Check box is checked by default** to have the check box selected unless the user deselects it.

Note: The appearance of the check mark inside the check box is determined by the font size and the color you specify in **General > Attributes > Text** of the Check Box Properties dialog box.

Create a radio button field

You use radio buttons when there can be only one choice. For example, you can uncheck the check boxes by clicking them again; however, the only way to uncheck radio buttons is to clear a form data either by using **Reset Form Field (Form > Recognize Forms)** or clicking a then-created Reset form button. See To create a Reset form button for details.

You can create a group of radio buttons with the same field name if you want the user to select only one choice among a set of choices. Though radio buttons in the same group have the same field name, each button has a different export value. To add a radio button field:

1. Open the PDF that you want to add form fields to. Choose **Form > Radio Button**.
2. On the page, drag a rectangle to specify its size and location. To call out the **Radio Button Properties** dialog box, do any of the following:
    - The dialog box appears automatically right after the field is created.
    - Or on the Sidebar Navigation pane or under the **Basic tab**, click **Select** and then use the Select tool to double-click the field.

3. In **General**, name the field and set its button attributes. To make it a required item, check **Required** at the bottom. You can then use **Highlight Fields** to outline it with the color you specified at **Required fields highlight color** in Forms Preferences to draw more attention to it. See Form preferences.
4. In **Options**, edit the following settings:
    - In the **Radio Button Style** section, specify the shape of the marker that appears inside the radio button when it is selected. Choose one from the style list: Check, Circle (the default), Cross, Diamond, Square, or Star. Note that this property doesn't change the shape of the selected radio button itself.
    - Click **Export Value** and specify the value that represents the item if the form data will be exported. The defined export value appears in the resulting data file if the button field is selected. If deselected, it shows **Off**, indicating the item is not selected.
    - Check **Button is checked by default** to have the radio button selected. You cannot use the *Reset Form Fields* command to deselect the item if this option is selected.
    - Check **Buttons with the same name and value are selected in unison** to select a group of radio buttons with the same field name and value.

    Note: To make radio buttons in a group able to detect how each other behaves, they must be given the same field.

Create a combo box field

Combo Box provides recipients with list of options to choose from in the form of drop-down menu and they can only select one option. You can add menu items to the item list in Options of the Combo Box Properties dialog box. In addition to the list of options to choose from, recipients are also allowed to enter their own text if **Allow user to enter custom text** is selected. Combo box can also calculate values of specified text fields and display the calculation result.

To add a combo box field:

1. Open a PDF file and choose **Form > Combo Box** .
2. On the page, drag a rectangle where you want the field to appear. To call out the **Combo Box Properties** dialog box, do any of the following:
    - The dialog box appears automatically right after the field is created.

- Or on the Sidebar Navigation pane or under the **Basic** tab, click **Select** and use it to double-click the field.

3. In **General**, name the field and set its box attributes. To make it a required item, check **Required** at the bottom. You can then use **Highlight Fields** to outline the required item with the color specified at **Required fields highlight color** in Forms Preferences to draw more attention to it.
4. The **Options** tab offers the following settings:
   - **Item.** Define the options to appear in the drop-down menu. Click the Item field, enter a menu item, and click the >> button to add it to the Item List to the right. Repeat this step to add more items.
   - **Item List.** Display the items that will appear in the Combo Box. Click the Item field, enter a list item, and click the button to add it to the Item List to the right. Repeat this step to add more items.
   - **Export Value.** Specify the value the represents the chosen item if the form data will be exported. Only the value of the selected item from the Combo Box menu will be exported and appear in the resulting data file.
   - **Sort Items.** Sort the items in the List Box numerically and alphabetically. If Sort Items is not selected, you can use the Up/Down buttons to rearrange the items in the list.
   - **Allow user to enter custom text.** Check to allow users to enter their text in the combo box if there isn't a suitable option.
   - **Commit selected value immediately.** Select to save the selected value as soon as you make a selection. If this option is deselected, the selected value will be saved only when you tab out of the current field or click another form field.

Create a List Box field

List Box provides users with list of options in the form of scrollable menus. You can define items to display in the List Box options menu, similar to how you define responses in Combo Box. To add a list box field:

1. Open a PDF file and choose **Form > List Box** .
2. On the page, drag a rectangle where you want the List Box field to appear. To call out the **List Box Properties** dialog box, do either of the following:
   - The dialog box appears automatically right after the field is created.

- Or on the Sidebar Navigation pane or under the **Basic** tab, click **Select** and use it to double-click the field.

3. In **General**, name the field and set its box attributes.
4. In **Options**, edit the following settings:
   - **Item**. Define the options to appear in the list box. Click the **Item** field, enter a list item, and click the >> button to add it to the **Item List** to the right. Repeat this step to add more items.
   - **Item List**. Display the items that will appear in the List Box.
   - **Export Value**. Specify the value that represents the item if the form data will be exported. Only the value of the selected item from the List Box menu will be exported and appear in the resulting data file.
   - **Sort Items**. Sort the items in the List Box numerically and alphabetically. If Sort Items is not selected, you can use the **Up/Down** buttons to rearrange the items in the list.
   - **Multiple Selection**. Check to allow users to select multiple items from the list.
   - **Commit selected value immediately**. Select to save the selected value as soon as you make a selection. If this option is deselected, the value will be saved only when you tab out of the current field or click another form field. For List boxes, this option is greyed out if Multiple Selection is selected.

Create a text field

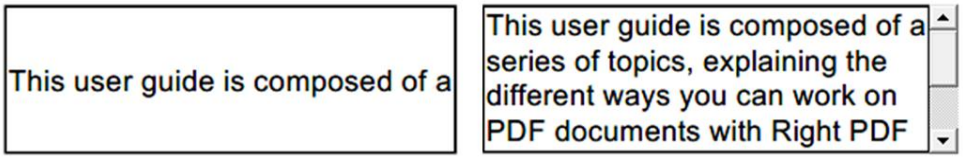
Text Field allows recipients to enter their own information that can be alpha text or numeric values. You can assign actions, define the text format, validate data, and perform text field calculations on text fields. In addition, since Date Field is just an extension of Text Field, this guide will not elaborate on it.

Among all field creation tools Right PDF provides, only Combo Box and Text Box can perform text field values calculation. For more information, see Calculate field data. To add a text field:

1. Open a PDF and choose **Form > Text Field**.
2. On the page, drag a rectangle where you want the field to appear. To call out the **Text Field Properties** dialog box, do either of the following:
   - The dialog box appears automatically right after the field is created.

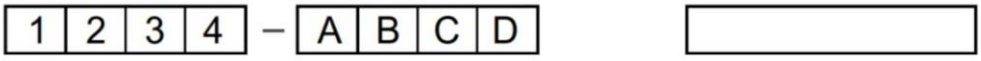
- Or on the Sidebar Navigation pane or under the **Basic** tab, click **Select** and use it to double-click the field.

3. In **General**, name the field and set its text field attributes. To make it a required item, check **Required** at the bottom. You can then use **Highlight Fields** to outline the required item to draw more attention to it. See Form preferences.
4. In **Options**, edit the following settings:
   - In **Alignment**, select one text alignment item among Left, Center, and Right.
   - In **Default Value**, enter text that will appear in the text field when the user first opens the file. You can use this to suggest the format you want (e.g., Last name, First name, SSN) and then set the default text attributes through the options beneath the Default Value field.
     - **Multi-line**. Move the text down to the next line when it reaches the end of the text box.



Multi-line deselected. (Left) Multi-line and Scroll long text selected. (Right)

     - **Scroll long text**. Allow scrolling text if the entry exceeds the visible area of the text field.
     - **Limit of __ characters**. Enter the number of characters to limit the length of entries.
     - **Password.** Make all user-entered text a series of asterisks (*). This option is not available when Multi-line is selected.
     - **Comb of ___ characters.** Evenly spread all user-entered text across the width of the text field. For example, if you enter 5, the field is evenly divided into 5 boxes with only one character allowed to be entered into each box. This option is available only when no other checkbox is selected.



Two text fields with comb of 4 characters of each (Left) A text field without the comb property (Right)

5. In **Format**, **None** is set as default so the input does not require any specific formatting. To constrain input formatting, choose an option from the list of formats.
6. Click the **Validate** tab. Restrict entries to specified ranges, characters, or values.
    - **Validate field value**. Check to turn on validation.
    - **Field value is From ____ To _____**. Set a numeric range for form fields. This option is available only when you select Number in Format tab.
    - **Run custom validation script**. Validate using the JavaScript you create or provide. Click Edit... to create and edit JavaScript.
7. In **Calculate**, select a calculation method from the drop-down menu. Use the selected calculation method to perform mathematical operations on the existing form field entries and display the result. See Calculate field data.

Note: Once you have set a default value for the text field, you cannot check the formats of "Number", "Date", "Time" or "Special" any more.

Create a digital signature field

Digital signature lets you add an empty digital signature field to a PDF document. Recipients of the form will be prompted to digitally sign the file with their digital IDs after clicking on this field. However, in order to sign a digital signature field, the digital ID must contain your unique signature and other information to identify yourself. See Manage digital IDs for details. To create a new digital signature form field:

1. Open a PDF file and choose **Form > Digital Signature**.
2. On the page, drag a rectangle where you want the digital signature field to appear. To call out the **Digital Signature Properties** dialog box, do either of the following:
    - The dialog box appears automatically right after the field is created.
    - Or on the Sidebar Navigation pane or under the **Basic** tab, click **Select** and use it to double-click the field
3. In **General**, name the field and set its field attributes. To make it a required item, check **Required** at the bottom. You can then use **Highlight Fields** to outline the required item to draw more attention to it. See Form preferences.
4. In **Sign**, click the drop-down menu and define how the other fields react when the digital signature field is signed:

- **Do nothing when signed.** Nothing happens after the field is signed. All fields are still available.
- **Marked "All fields" as read-only.** All fields in the current PDF document become read-only (locked) after the digital signature field is signed.
- **Marked "All fields except followings" as read-only.** Only the selected fields are available after the digital signature field is signed.
    1. Select **Marked "All fields except following" as read-only** from the drop-down menu.
    2. Click the **Pick...** button.
    3. In the **Field Selection** dialog box, select the fields that will remain available after the digital signature field is signed. Click **OK**.
- **Marked "Just these fields" as read-only.** The selected fields will be locked. You cannot make any changes to the selected fields after the digital signature field is signed.
    1. Select **Marked "Just these fields" as read-only**.
    2. Click the **Pick...** button.
    3. In the **Field Selection** dialog box, select the fields that will be locked after the digital signature field is signed. Click **OK**.
- **Execute following script when signed.** Activate a custom JavaScript when the form is digitally signed. Click **Edit**... to edit or create a new JavaScript action.

5. Click **Close**.

Barcode Tool

Barcode fields transform data entry of a PDF document into a visual pattern that can be easily scanned and interpreted for analysis. It eliminates the need to manually incorporate information into a database, preventing potential data-entry errors from happening.

Create and edit a barcode field

1. Open a PDF file and choose **Form > Barcode Tool**.

2. Drag a rectangle to define the size and the location of the barcode area. Do any of the following to call out the **Barcode properties** dialog box in which you can adjust the barcode properties using the given tabs:
    - The dialog box pops up upon the creation of a new barcode.
    - Or using the Select Tool, double-click a barcode field.
    - Or using the Select tool, right-click a barcode field and select **Properties**... from the options.
3. The tabs in the Barcode properties dialog box offer the following settings:
    - **Options**
        - **Symbology.** Select a **Symbology** option from the drop-down menu, including PDF417, QR Code, and Data Matrix.
        - **Compress Data Before Encoding to barcode.** This enables compressing data before it is encoded into a barcode so that more user data can be stored. Make sure your processing device can read compressed data before using this function.
        - **Decode Condition.** Select the type of hardware to process the barcode data, including Handheld Barcode Scanner, Fax Server, Document Scanner and Custom.
        - Click **Custom** to set a custom X Dimension, Y/X Ratio, and Error Correction Level.
        - **Manage Barcode Parameters**.... In the Manage Barcode Parameters dialog box, you can add new edit, delete, import, and export parameters. For more information, see [Manage custom barcode settings](#).
    - **Value**



        - Select **Encode using** and then select a format, either Tab Delimited or XML, from the drop-down menu. Then click **Pick**... and select the fields you wish to be encoded in the barcode.
        - Select **Include field names** to include the field names in the barcode data. If you do not want to include the field names, uncheck it.

- Select **Custom calculation script** and then click the **Edit**... button. In the **JavaScript Editor** dialog box, enter your custom JavaScript code.
- **Reference to published form**. It shows the path to the PDF form. You are allowed to edit this by typing information in the field. The URL reference is encoded into the barcode and displayed on the form below the barcode if you choose to encode the barcode field using XML values.

4. If needed, make changes to the settings in the General and Actions tabs and then click **Close**.

Manage custom barcode settings

You can adjust your custom barcode parameters and also edit, delete, and share a set of customs settings for barcode parameters in the Barcode properties dialog box.

- **Create a new barcode parameters set**
  1. Open the **Barcode properties** dialog box by doing either of the following using the Select Tool:
     - Right-click a barcode field and select **Properties**....
     - Double-click a barcode field.
  2. In the **Options** tab of the Barcode properties dialog box, click the **Manage Barcode Parameters**... button.
  3. In the **Manage Barcode Parameters** dialog box, select an existing parameter set you want to use as the basis of the new set and then click **New**... or directly click **New**....
  4. In the **Barcode Parameters** dialog box, enter a name for the new parameter set in the Name field and a description in the **Description** box.
  5. Select options for the Symbology, X Dimension, Y/X Ratio, and Error Correction Level and then click **OK**.

  Note: after the newly defined custom parameter set is created and appears in the list of parameter sets, all options to the right become available, by which you can edit, delete, import or export the selected custom parameter set.

- **Edit or delete a new set of barcode parameters**

1. In the **Options** tab of the Barcode properties dialog box, click the **Manage Barcode Parameters**... button.
2. In the **Manage Barcode Parameters** dialog box, select a custom barcode parameter from the list and then do the appropriate action listed below:
    - Click **Edit**... to make adjustments to the settings of the selected barcode parameter.
    - Click **Delete** to remove the select barcode parameter from the list.
    - Click **Close**.

- **Import or export a set of barcode parameters**
    1. In the **Options** tab of the Barcode properties dialog box, click the **Manage Barcode Parameters**... button.
    2. In the **Manage Barcode Parameters** dialog box, do the appropriate action listed below:
        - Select a custom barcode parameter set from the list and then click **Export**.... In the **Save As** dialog box, specify a file name for the file that will end with the extension .bps and a location to save the file.
        - Click **Import**... and locate a .bps file you want to import and then click **Open**.

Set tab order

Set Tab Order Tool allows users to move from one field to another field using the **Tab** key. By default, the field tab order is set by the order in which the fields are created. You can reset the tab order to make it easier for user to navigate through the form fields.

Options for tabbing through items on a page

1. Do either of the following to open the **Page Thumbnails** panel:
    - Choose **Document > Assemble > Page thumbnails**.
    - On the Sidebar Navigation pane, click the **Page Thumbnails** icon.
2. In the **Page Thumbnails** panel, right-click the page thumbnail on which you want to set the tabbing order and choose **Page Properties**... from the options menu.
3. In the **Page Properties** dialog box, the **Tab Order** tab offers the following settings for you to specify the order users tab through the fields in a form:
    - **Use Row Order.** Tab through fields from top to bottom, row by row.
    - **Use Column Order.** Tab through fields from left to right, column-by-column.
    - **Use Document Structure.** The tabbing follows the order defined with the "Set Tab Order Tool".
    - **Unspecified.** No tab order has been set. You can manually set the tab order using **Set Tab order Tool**.
4. Click **Close**.

To set the tabbing order using Set Tab Order Tool

You can use Set Tab Order Tool to manually set tabbing order for form field elements.

1. Open a PDF file that contains form fields or you can create form fields on a PDF file.
2. In the **Page Thumbnails** panel, right-click the thumbnail on which you want to set the tabbing order and then select **Page Properties...** from the options menu.

3. In the **Page Properties** dialog box, click **Tab Order** and select **Unspecified** from the tab order options. Click **Close**.
4. Choose **Form > Set Tab Order Tool**. Click **OK**.
5. A number appears in the upper-left corner of each form field, indicating the tabbing order you set. Click the form fields in the order as desired, and then click anywhere to finish.
6. To test the tab order you set, click on any field on the page with the **Hand** tool and press the **Tab** key.

Note: You are not allowed to use Set Tab Order Tool unless you select Unspecified in the Tab Order of the Page Properties dialog box.

Convert static form to dynamic form

Interactive forms are designed for users to enter data into the form fields. However, static forms lack the interactive quality in that they may be scans of paper forms or non-interactive forms created in Word or other applications.

Due to the complexity of designing a fillable PDF file, most PDF forms are static, meaning the form fields cannot be filled electronically. Recognize Forms can detect the static form fields in a PDF document and then convert them to electronically fillable forms. From this point, information you type into the fields can be collected and other tasks, such as calculating field values, can be performed. To convert a static form:

1. Open a static form in Right PDF.
2. Choose **Form > Recognize Forms**.
3. Processed form fields are listed in the **Fields** panel to the left.
4. To edit properties of specified text fields:
    - Double-click the field name on the panel.
    - Right-click the field and choose **Properties**….
5. To test the form fields, choose **Basic > Hand** and click on the recognized form fields in the document pane. You can type text in it.

Import and export form data

Using Import and Export commands, data within a PDF form can be moved to and from other file formats capable of preserving form data. The form data can be exported and repeatedly used to fill out other forms, which can be useful for speeding up form filling especially for a large number of forms. The process includes exporting form data which can be saved in one of the following file types, FDF, XFDF, XML, TXT or CSV and then importing those to fill empty forms.

To import data into a PDF document

1. Open a PDF file that contains unfilled forms.
2. Choose **Form > Import Data**.
3. In the dialog box, specify a file type (FDF, XFDF, XML, TXT) and locate the file with the form data you need to import into the open form.
4. Click **Open**. The form data will be inserted into the proper fields as long as the chosen form contains data that are suitable for the currently open form.

To export form data from a single filled form

1. Open a PDF file that contains form fields or you can create form fields on a PDF file.
2. Choose **Form > Export Data**.
3. Specify a name, location and file format in the dialog box.
4. Click **Save**. The form data is then stored in the file type and at the location you defined.

Export data from multiple forms

Form Data can be exported from multiple forms to the file types XML and CSV (Comma Separated Values). The file types can be opened by Excel or Notepad. The field names in the forms become the header texts for the columns. You can export form data of all field types except for digital signature fields.

1. Open a PDF file.
2. Choose **Form > Export Data** from Multiple Forms.
3. In the **Export Data from Multiple Forms** dialog box:
    - Click **Add Files** and choose the files containing form data to be exported. Click **Open**.
    - Click **Remove Files** to delete one or more files from the **Files to Export Data Form** list.
    - Check **Include most recent list of files to export data from** to add all recently exported form files to the list.
4. Click **Export** when the file list is all set.
5. In the dialog box, specify a location to save, a file name, and a file type (*.csv) or (*.xml). Click **Save**.
6. After the export is done, click **View File Now** if you would like to view the resulting file with your spreadsheet program. Otherwise, click **Close Dialog** to finish exporting.

Reset form fields

Reset Form Fields allows users to clear up any data you have already entered in the form, except for default values of text fields and options within combo boxes and list boxes. You can also create a Reset form, which lets users clear only specific fields.

To clear form data using Reset Form Fields command

1. Open a PDF file that contains form fields or you can create form fields on a PDF file.
2. Choose **Form > Reset Form Fields**.

To create a reset form button

1. Open a PDF file and choose **Form > Button**.
2. On the page, drag a rectangle at where you want the reset form button to appear. The **Button Properties** dialog box appears right after the button is created, or you can double-click the button to open it as well. In the **Button Properties** dialog box, set **General** and **Options** properties for button appearance and behavior as needed.

3. In **General**, name the field and set its box attributes.
4. In **Actions**, do the following to set a *Reset Form Button* and then click **Close**:
    a. **Select Trigger.** Determine how to initiate resetting. For example, if you choose **Mouse Up**, the selected fields are reset upon releasing the mouse after a click.
    b. **Select Action**. Specify an action that the button performs when it is triggered.
        - Select **Reset a form** from the drop-down menu
        - and click **Add**....
        - In the **Reset a Form** dialog box, all the fields are selected by default. Uncheck the fields you do not want to be reset. You can click on the **Deselect All** button to uncheck all the fields at once. Click **OK**.
    c. The **Do Actions** box shows **Reset a form** nested under **Mouse Up**.
5. Click **Close**.

Hide or show fields

In some cases, you may need to show or hide certain fields in your PDF form. For example, you want to hide some form fields so that users can focus on the specific parts of the form they need to fill out. To show/ hide fields:

1. Open a PDF file and go to the **Form** tab. The button to show or hide fields can be any type of form fields except barcode. Select one form creation tool and drag a rectangle at where you want the button to appear on the page. For example, select Button and drag a rectangle to specify its size and location.
2. On the page, drag a rectangle at where you want the reset form button to appear. The **Button Properties** dialog box appears right after the button is created, or you can double-click the button to open it as well. In the **Button Properties** dialog box, set **General** and **Options** properties for button appearance and behavior as needed.
3. In the **Button Properties dialog** box, set **General** and **Options** properties for button appearance and behavior as needed.
4. In **Actions**, do the following to set a button for showing or hiding fields and then click **Close**:
    - **Select Trigger**. Determine how to initiate showing or hiding. For example, if you select **Mouse Up**, all selected fields are hidden or shown upon releasing the mouse after a click.
    - **Select Action**. Specify the action the button performs when triggered.

        - Select **Show/Hide field(s)** from the drop-down menu.
        - Click the **Add**....
        - In the **Show/Hide Field(s)** dialog box, select to **Hide** or to **Show** the selected fields.
        - Click **OK**.
5. Click **Close**.

Calculate field data

Calculations are one of the most significant functions of electronic form. For instance, it can combine values from form fields and present the calculation results on a **Text Field** or **Combo Box**. You can go to the **Calculate** tab in the **Text Field** and **Combo Box Properties** dialog box, in which you can select a predefined calculation method and the fields affected thereof. To create a calculation:

1. Open a PDF file and do one of the following to call out the **Text Field Properties** dialog box:
    - Choose **Form > Text Field**. On the page, drag a rectangle where you want the text field to appear and the dialog box pops up.
    - Using **Select** tool, double-click on the text field intended to show calculation result.
    - Using **Select** tool, right-click on the text field intended to show calculation result and select **Properties**....
2. Select **Options** and choose an **Alignment** type to determine at which position the result displays in the calculation field. For example, select **Right** from the options to align the values to the right.
3. In **Format**, click **Number** and then click the **Decimal** drop-down menu. Select the number of digits displayed to the right of the decimal point.
4. In **Calculate**, select a predefined calculation option from the drop-down menu:
    - Select **as the sum (+) of selected fields** to sum a group of data.
    - Select **as the product (x) of selected fields** to multiply values.
    - Select **as the average of selected fields** to average a group of values.
    - Select **as the minimum of selected fields** to present the minimum value among a group of fields.
    - Select **as the maximum of selected fields** to present the maximum value among a group of fields.

- **Using simplified field notation**. This custom calculation uses regular math symbols, + (addition), - (subtraction), * (multiplication) and / (division), and field names are used as operands. For example, if you want to calculate the product of the sum of two numbers and subtraction of two numbers, enter (Text1+Text2)*(Text1-Text2).
- **Using custom calculation script**. This custom calculation uses JavaScript for carrying out more complex calculations and gives full access to all the fields in the PDF. For example, to calculate the product of the sum of two numbers and subtraction of two numbers, enter eevent.value=((this.getField("Text1").value+this.getField("Text2").value))*((this.getField("Text1").value-this.getField("Text2").value));

5. If you have selected a predefined calculation in the previous step, click **Pick …** , select or deselect the checkboxes to decide which field is involved in calculation, and click **OK**; if you have selected a custom calculation, click **Edit …**, enter script in the JavaScript editor, and click **OK**.
6. Click **Close**. When you enter numbers in designated fields, the calculation-enabled field displays the result value as per the chosen type of calculation in step 4.

Set Field Calculation Order

When there are multiple calculations in a form, they are performed in the order you defined, and sometimes it takes a specific order to get correct results.

For instance, in order to use the result obtained from calculating form field A and B to calculate the value of a third form field C, A and B must be calculated together first to get the correct final results.

1. Choose **Form > Set Field Calculation Order** to open the Calculate Fields dialog box, which displays all calculable fields in your form and the order in which the calculations are carried out.
2. To modify the field calculation order, select the field from the list, and then click the Up or Down arrow button
3. Click **OK**.

Note: when you create or test form fields, Right PDF will automatically perform all calculations. You can go to **Preferences > Forms** and deselect **Automatically calculate field values** to disable this.

Chapter 9: Security

Choosing a security method of PDFs

Which type of security do you need?

It depends on the protection you need to secure your PDF files.

Examples	Protection level	Actions
You allow only certain people who have the correct password to open a PDF, or copy, print or edit its content.	Require a password to open, copy, or print its contents.	Choose **Security > Encryption**. 1. **Open Password.** Only people with the correct password can open and view the document. 2. **Permission Password.** You don't need a password to open the document, but you need the correct permissions password to change the restricted functions. 3. **Interactive Password.** You can secure a PDF file with both types of passwords and further choose which content to encrypt and which action to restrict. The PDF secured with both types of passwords can be opened with either one. However, only the permissions password allows users to change the restricted functions. See Securing PDFs with passwords.

You want to allow specified people to view the PDF and apply different security schemes to recipients.	Only the people you specify can view and open the PDF encrypted with certificates.	Choose **Security > Encryption > Interactive Certificate**. Alternatively, you can open the Document Properties dialog box and choose **Security > Security Method > Certificate Security**. To specify recipients, you must import the certificates from intended recipients into your list of trusted identities. See Securing PDFs with certificates.
You want recipients to know that you have already approved the PDF content.	Sign and certify the PDF with a digital ID to add digital signatures.	Choose **Security > Sign/Certify > Sign/Certify**. Select **Certify Document** to add your digital ID. Then you can specify which action can be done by recipients. To perform signing/certifying, you need a digital ID, which can be either an existing one or a Self-Signed Digital ID. See Signing PDFs.
You want to send the PDF as email attachment without having to encrypt all contents.	Attach a PDF to an email.	Choose **Security > Secure Delivery**. You can send a protected PDF as email attachment.

Password-/certificate-based security

You can use password-based security and certificate-based security to control who can access the files and which function they can use once the protected file is opened. If you use passwords to secure your PDF file, only the people who have the password can view or make changes to your PDF file. If you use certificate-based security, only the people you specify can view the PDF, and passwords are not needed to open documents.

Password-based security

You can use passwords to restrict access to a PDF document or certain functions after the PDF is opened. Then, you can specify a desired encryption type, a PDF version, and other settings for the intended recipients. There are two types of password-based security:

- **Document open password**. Only people having the correct open password can open and view the PDF file.
- **Permissions password**. Using a permissions password, you can restrict certain functionalities, including printing, editing and copying. Though the permissions password doesn't restrict opening the PDF, you need to enter the correct password to change the security settings.

Certificate-based security

Using a certificate to secure a PDF, you can ensure that only the intended recipients can view a PDF. Furthermore, the digital signature serving as a certificate assures recipients that you are the person who distributed the document.

When encrypting a PDF with a certificate, you can specify the documents to encrypt, the level of encryption, the recipients allowed to open the document, and further specify different security settings for individual recipients. For instance, you may allow one person to perform commenting, filling forms, while others can do anything except for extracting pages.

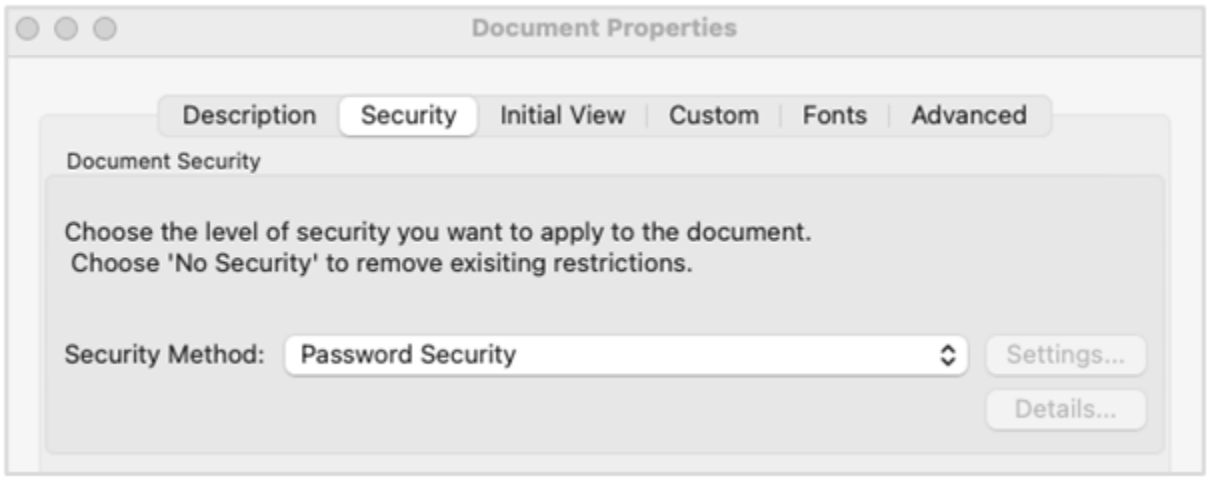
View the security method applied to a PDF

In the **Document Properties** dialog box you can view which type of security method is currently employed and choose a method for the document. You can also choose **No Security** from the Security Method menu to directly remove existing restrictions.

1. Open a PDF file. If the document is encrypted with password-based security, you have to type in the document open password to open and view the PDF.
2. Do one of the following to open the Document Properties dialog box:
    - Choose **Security > Encryption > Security Properties**.

- Press **Command + D** on your keyboard.
- Choose **File > Properties > Security** tab.

3. On the **Security** tab, the **Security Method** menu shows the security method applied to the document:
   - Click **Details**... for more security information regarding encryption level and encrypted content.
   - Click **Settings**... to edit security settings. If the document is secured with a permissions password, you have to type in the correct password to unlock restricted functions.
   - You can remove the existing encryption by selecting **No Security** from the **Security Method** drop-down menu. If the PDF document has already been secured by a permissions password, you will be prompted to enter the correct permissions password before you can remove permissions settings.



The Document Properties dialog box where you can view and edit the security method applied to the file.



Enter the correct permissions password to remove security settings of the document encrypted with permissions password.

Securing PDFs with passwords

How do passwords work?

You can restrict access (e.g. open, edit and print) to documents by protecting them with passwords. There are 2 types of passwords:

- **Open Password.** You must enter the correct password to open the PDF.
- **Permissions Password.** You can open the PDF freely, but must enter the correct Permissions Password in order to use restricted functions.

Note: if the document is protected by both passwords at the same time, you can use either password to open it, but still, you must enter the Permissions Password when you attempt to access restricted functions.

Methods to secure a PDF or PDF Portfolio with password security

You can secure a single PDF file or components of a PDF Portfolio with password-based security through the Password Security dialog box.

- **Password Security dialog box**. You can view and edit the security settings of open or permission passwords. Choose Security > Encryption > Interactive Password; or after you open the Document Properties dialog box, click the Security tab and then Settings …. Or you can choose Security > Encryption > Open Password or Permission Password.
- **Security Scheme**. This is a security settings file that you can customize and reuse. If you often need to apply the same security settings to multiple documents, it is advised to create a security scheme to save time.

Note: you are advised to create a backup of the PDF before applying security settings, lest you forget the password. It is impossible to retrieve password from PDF.

Add password protection

You can protect PDF document or PDF portfolio through **Password Security** or **Security Scheme**. Note: you can only encrypt an entire PDF portfolio by choosing File > Properties to open Document Properties dialog box, in which you go on to click Security tab, and choose Password Security from the Security Method drop-down menu.

1. Follow any of the ways below to protect PDF or PDF portfolio with password.
    - If you want to protect a single PDF file, open a PDF and do any of the following:
        - Choose **Security > Encryption > Interactive Password** to open Password Security dialog box; or you can open Document Properties dialog box, click the Security tab and choose Password Security from the Security Method drop-down menu. If the PDF has been password-protected, click **Settings** … to open Password Security dialog box.
        - You can also create or apply a security scheme to the PDF. See Security Scheme.
    - If you want to encrypt a certain PDF inside a PDF portfolio, open it and double-click the PDF file you want to encrypt, and do any of the following:
        - Choose **Security > Encryption > Interactive Password** to open Password Security dialog box; or you can open Document Properties dialog box, click the Security tab and choose Password Security from the Security Method drop-down menu. If the PDF has already been protected with a password, click **Settings** … to open Password Security dialog box.
        - You can also create or apply a security scheme to the PDF. See Security Scheme.
    - If you want to encrypt an entire PDF portfolio, open it and do the following:
        - Choose **File > Properties** to open the Document Properties dialog box. Click the Security tab and choose Password Security from the Security Method drop-down menu. If the PDF has already been protected with a password, click **Settings** … to open Password Security dialog box.
2. In Password Security dialog box, do any of the following and click **OK**.
    - To restrict access to PDF to those who have the correct password, choose a version of Compatibility, specify the components to encrypt, select **Allow document opening only by password**, and type in a password in the Document Open Password field.

- To restrict access to certain functions, choose a version of Compatibility, select **Set a permissions password to restrict editing or security settings**, and type in a password in the Permissions Password field. Afterwards, you can specify the functions to restrict, such as print, edit, copy and more.

3. In Password dialog box, re-enter the same password to click **OK**.

Restrict access to PDF document

Once a document is protected by open password, it means anyone must enter the correct password to open it. You can encrypt a PDF document, PDF files within a PDF portfolio, or an entire portfolio.

Note: you are not allowed to change or remove the security settings of a signed/certified document. To add a password, you have to clear all signature fields by choosing Form > Reset Form Fields or use a then-created Reset Form button.

1. Open a PDF document or PDF portfolio, and do any of the following to open Password Security dialog box:

   - To add a password to a single PDF file or a PDF within a portfolio (double-click to view a file in portfolio) , choose **Security > Encryption > Interactive Password**, and click **OK** in the prompt that follows. Alternatively, open **Document Properties** dialog box, click **Security** tab, and choose **Password Security** from the Security Method drop-down menu.
   - To protect an entire PDF portfolio with a password, choose **File > Properties** to open the Document Properties dialog box. Click the **Security** tab and choose **Password Security** from the **Security Method** drop-down menu.

2. In the **Password Security** dialog box, choose a version from the **Compatibility** drop-down menu. The version you choose determines the level of encryption.

   - **PDF 1.2 and later (40-bit)** secures the document using 40-bit encryption.
   - **PDF 1.4 and later (128-bit)** secures the document using 128-bit encryption.
   - **PDF 1.5 and later (128-bit)** secures the document using 128-bit encryption.
   - **PDF 1.6 and later (128-bit AES)** secures the document using the 128-bit AES encryption.

- **PDF version 1.7 and later (256-bit AES - low security)** secures the document using 256-bit AES encryption.
- **PDF version 1.7 and later (256-bit AES - high security)** secures the document using 256-bit AES encryption.

  Note: be aware that anyone using an earlier version of PDF application/reader cannot open a PDF document with a higher compatibility setting.

3. Select the document components to encrypt and check **Allow document opening only by password.** If **Encrypt only file attachments** is selected, File Attachment Open Password will replace Open Password. See encryption options below:
   - **Encrypt all document contents**. Select to encrypt the document and the document metadata.
   - **Encrypt all document contents except metadata**. Select to encrypt the contents of a document except metadata. This option is available only when the compatibility is set to PDF 1.5 or later.
   - **Encrypt only file attachments**. This option is available only when the Compatibility is set to PDF 1.6 or later. It requires users to type a **File Attachment Open Password** to open file attachments and they no longer need a password to open the document. Select this option and then type a password into the File Attachment Open Password field. This is mainly used to secure file attachments attached in a security envelope.
4. Click **OK**. In the Password dialog box that follows, re-enter the same password and click **OK**.

Restrict editing, printing and copying PDF content

You can set permissions to prevent other users from editing, printing or copying PDF contents. Those functions will stay locked without the correct password.

Note: while most PDF applications follow the specs of permissions password, some may not be fully compatible, meaning recipients using those products could run into complications.

1. Open a PDF document or PDF portfolio, and do any of the following to open **Password Security** dialog box:

- To add a password to a single PDF file or a PDF within a portfolio (double-click to view a file in portfolio), choose **Security > Encryption > Interactive Password**, and click **OK** in the prompt that follows. Alternatively, open **Document Properties** dialog box, click **Security** tab, and choose **Password Security** from the **Security Method** drop-down menu
- To protect an entire PDF portfolio with a password, choose **File > Properties** to open the **Document Properties** dialog box. Click the **Security** tab and choose **Password Security** from the **Security Method** drop-down menu.

2. In the **Password Security** dialog box, choose a version from the Compatibility drop-down menu, and specify the components to encrypt. In the Permissions section, select **Set a permissions password to restrict editing or security settings.** This feature becomes unavailable if you have selected **Encrypt only file attachments.**
3. Enter a password in the **Permissions Password** field. The same password could also serve as Open Password.
4. Specify what the recipient can print from the **Printing permitted** drop-down menu:.
    - **None.** Select to prevent users from printing the document.
    - **Low Resolution.** It allows users to print at no higher than 150-dpi resolution. This option is available only when the compatibility is set to PDF 1.4 and later.
    - **High Resolution.** It allows users to print at any resolutions and get a clear copy of the PDF file.
5. Select what the recipient can change from the **Changes permitted** drop-down menu:
    - **None**. Select to prevent users from making any changes to the PDF.
    - **Creating, inserting, deleting, and rotating pages**. Select to allow users to create, insert, delete, and rotate page or page thumbnails. It also allows creating new bookmarks. This option is available only when the compatibility is set to PDF 1.4 and later (128-bit).
    - **Filling in form fields and signing signature fields**. This option allows users to fill in forms and add digital signatures. However, they cannot create form fields or add comments. The option is not available if the compatibility is set to PDF 1.4 and later (128-bit).
    - **Commenting, filling in form fields, and signing signature fields**. This option allows users to add comments and digital signatures, and fill in forms while it doesn't allow creating form fields.
    - **Any except extracting pages**. This option allows users to edit the document, add comments and digital signatures, and create form fields. However, extracting pages is not allowed.

6. Select the following options as needed and click **OK**:
    - **Enable copying of text, images, and other content**. This option allows users to copy the contents of a PDF. This option is available only when the compatibility is set to PDF 1.4 and later (128-bit).
    - **Allow accessibility (screen readers can access text for the visually impaired)**. This option allows visually impaired users to read the document with screen readers that can access the text of a document.
7. At the prompt to confirm the password, retype the password in the Permissions Password field and then click **OK**.

Securing PDFs with certificates

After exchanging certificates with the recipients and adding them to the list of Trusted Identities, the certificate-based security lets you ensure only the intended recipients open and view the document. A certificate includes the public key component of a digital ID that can be shared and added to your list of trusted identities. See Manage Digital IDs.

Before you distribute a certificate-secured PDF file, you must receive certificates from those whom you intend to send the file to and add the certificates to the list of trusted identities, setting them as trusted recipients. Likewise, to open a certificated-secured PDF file, you need to create your own digital ID (consisting of a private key and a public key) and share the certificate (the public key of you digital ID) with the person who distributes the file encrypted with certificates.

When managing certificate security, you can specify who can view the document and define permissions for each recipient. For example, you can grant one person the power to perform any function except extracting pages, while another is limited to filling in form fields and signing signature fields.

Note: remember to add your own certificate to the list of intended recipients of the encrypted document when you manage certificate-based security. This way, you have the access to the PDF file.

Encrypt PDF or PDF Portfolio with a certificate

To encrypt a single PDF or a PDF file within a PDF Portfolio with a certificate, you can use either the Certificate Security Settings dialog box or a custom Security Scheme. But if you want to encrypt an entire PDF portfolio, you can only use Certificate Security Settings.

- **Certificate Security Settings dialog box**. You can specify the document components to encrypt, algorithm, recipients and their permissions. To open the Certificate Security Settings dialog box, choose Security > Encryption > Interactive Certificate. Or, open the Document Properties dialog box, click Security, and then select Certificate Security from the Security Method drop-down menu.
- **Security Scheme**. This is a security settings file that you can customize and reuse. If you need to repeatedly apply the same set of security settings to multiple files, you can save time by creating a security scheme. See Create a new security scheme.

Encrypt a PDF or PDF Portfolio with a certificate

You can use Certificate Security Settings to encrypt a single PDF or a PDF portfolio and save your settings (e.g. files to encrypt and trusted recipients).

Use Certificate Security Settings to encrypt PDF or PDF portfolio

1. Open a PDF or a PDF portfolio, and do any of the following to open Certificate Security Settings:
    - Choose **File > Encryption > Interactive Certificate**, and click in the popup dialog box.
    - Choose **File > Properties** to open Document Properties dialog box. Click Security tab, and choose Certificate Security from the Security Method drop-down menu. To encrypt an entire PDF portfolio, choose **Option > Cover Sheet** in advance so that changes made in security settings will be applied to the entire PDF portfolio.
2. In the Certificate Security Settings dialog box, decide whether to save the settings as a scheme. Click Next >. Select the document components to encrypt, choose a level of encryption from the Encryption Algorithm drop-down menu, and click Next>. The encryption

algorithm and key length are version-specific. Choose a PDF version compatible with the recipients' reader or PDF application.

- If you select 128-bit, recipients must have PDF 1.5 and later to open the document.
- If you select 128-bit AES, recipients must have PDF 1.6 and later to open the document.
- If you select 256-bit AES, PDF 1.7 and later are required to open the document.

3. Create a list of recipients for the encrypted PDF and then click Next>. Remember to always include your own certificate in the recipient list so that you also have access to the document. Select trusted contacts from the list of Trusted Identities and then click Add>> to add them to the list of recipients. Then, you can change encryption settings as stated below:
   - To add more trusted identities, click Import Certificate to trust list (A) and select a certificate file.
   - To check the information of a trusted recipient, select the recipient and then click Recipient Details (D) to open the Certificate Attributes dialog box.
   - To remove a recipient, select one and then click Remove<<. Make sure your certificate is still on the recipient list unless you don't want the access to the encrypted file.
   - To individually define permissions for each recipient, select one recipient and then click Set Permissions (C). In the Recipient Permission Settings dialog box, make any changes as needed and then click OK. For more on Recipient Permission Settings, see Restrict editing, printing and copying PDF content.
4. Click Finish. Then click Save Now to apply this security scheme to the document.



Create a list of recipients A. Import Certificate to trust list B. Create Certificate C. Set Permission D. Recipient Details

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Encrypt PDF by applying Certificate Security Scheme

Certificate Security Scheme keeps all of your security settings so that you can reuse and save time. If you keep close links with specific recipients, you can save the settings to a scheme and apply to the document without having to repeatedly add recipients every single time.

1. Open a PDF or a portfolio and do any of the following to open Security Panel:

   - Choose Security > Security Panel .
   - Click Security Panel in Sidebar Navigation Pane .

2. You can create a security scheme if needed. Click Create Security Scheme to open New Security Scheme dialog box, in which you set the name, description and appearance of it. When finished, click Next >, and select Use public key certificate as the security type. If you want to use a predefined security security scheme, edit it before you apply. See Security Scheme.
3. Do any of the following to apply a security scheme of Certificate Security:

   - Right-click the certificate security scheme that you want to apply and choose Apply Security Scheme.
   - Select the certificate security scheme that you want to apply. Click Security Scheme Option and choose Apply Security Scheme.
   - Double-click the certificate security scheme that you want to apply.

4. Click **Yes** in the popup notification box.
5. Click **Save** Now to apply the new security settings.

Adding certificate to Trusted Identities list

When you receive certificates from others, you can add them to your list of trusted identities and set them as trusted roots. There are two ways to store certificates in your list of trusted identities: 1) import an existing certificate or 2) add a certificate from a digital signature in a signed PDF document. The list of trusted identities helps you validate the signatures of the users on any documents you receive from them.

Import an existing certificate

1. Open a PDF file.
2. Choose Security > Trusted Identities.
3. In the Manage Trusted Identities dialog box, click Add....
4. In the Open dialog box, select the certificate to use and click Open.
5. To set a certificate as a trusted identity in any documents, select a certificate and click Set as a Trusted Root.

Add a certificate from a digital signature in a signed PDF

You can directly add a certificate from a signed PDF document to your list of trusted identities.

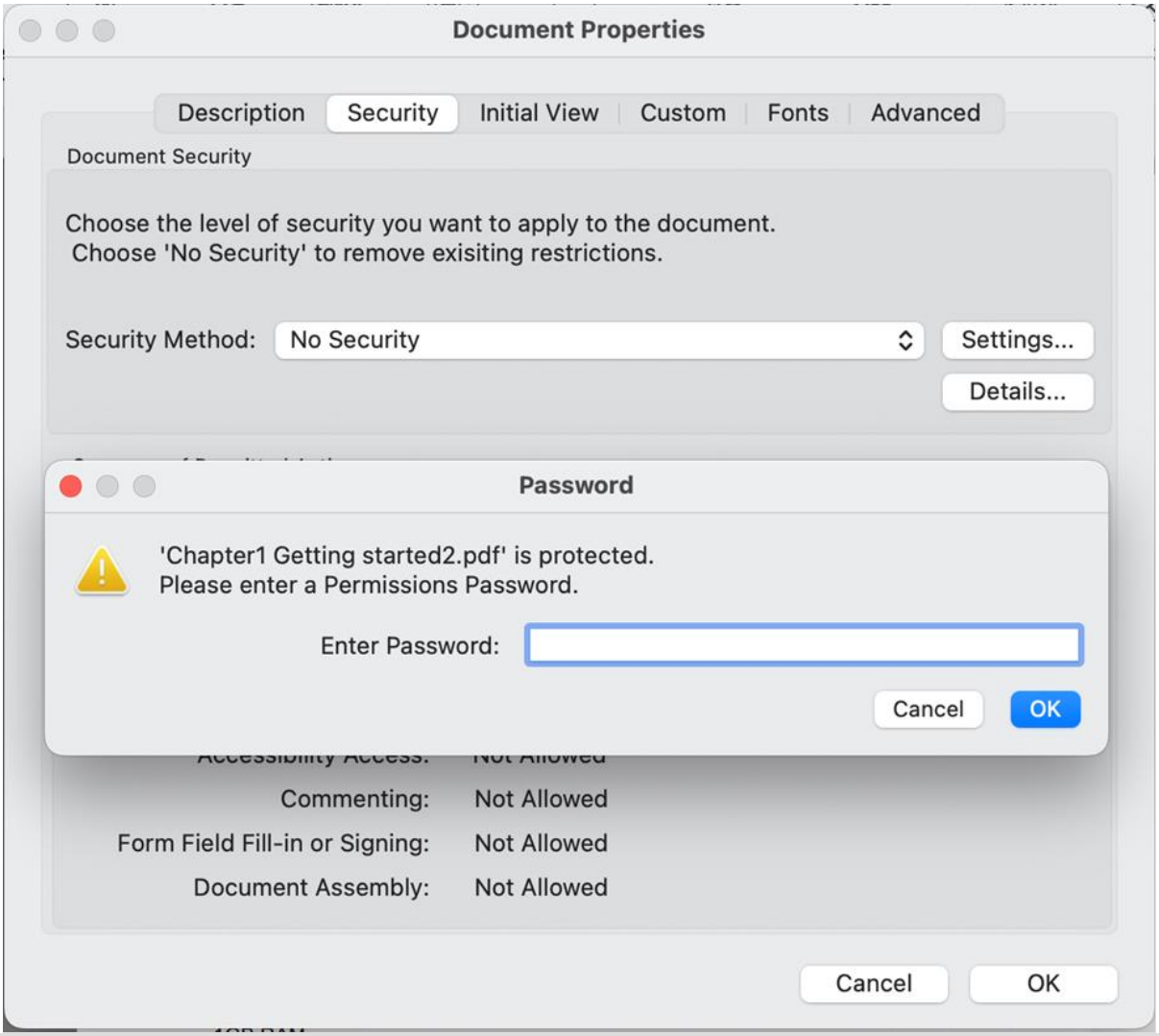
1. Open a PDF that contains digital signatures.
2. Do any of the following to open the Signature Properties dialog box:
    - In the Signatures panel, right-click on the signature and select Properties....
    - Right-click on a signature field on your page and select Properties....
    - In the Signatures panel, click the Signatures Panel Options button and select Properties... from the menu.
3. In the Signature Properties dialog box, click the General tab. In the Additional Information section, click Verify Identity....
4. In the Verify Identity dialog box, click Add as a Trusted Root to store the certificate of the digital signature in your list of trusted identities, making signatures of the user valid on any documents.

Remove encryption settings

You can remove security settings from a PDF file that is already opened. However, it requires the correct permissions password if the PDF file has already been encrypted with permissions password security.

Remove password security

1. Open the PDF and do any of the following:
    - Choose Security > Encryption > Remove Security Settings. Click OK.
    - Open the Document Properties dialog box, click the Security tab, and choose No Security from the Security Method drop-down menu.
2. Your choices vary according to the type of security applied to the document:
    - For documents protected by open passwords, click OK.
    - For documents protected by permissions passwords, in Security tab, choose No Security from the Security Method drop-down menu.
3. Click Save Now to apply the changes to the current document, and click OK.



In order to remove permissions password, choose No Security, and enter the correct password.

Remove certificate security

Open the PDF and do any of the following:

1. Choose Security > Encryption > Remove Security Settings. Click OK.
2. Open the Document Properties dialog box, click the Security tab, and choose No Security from the Security Method drop-down menu.
3. Click Save Now to apply the changes to the document. Click OK.

Batch encrypt

You can use encrypt multiple PDF documents with password or certificate in batch.

1. Do any of the following to open Batch Encrypt dialog box:

    - Choose Security > Encryption > Batch Encrypt.
    - Choose Start > Recent, and click **Protect PDF** in Quick Launch.

2. In the Batch Encrypt dialog box, browse and select the PDF documents or PDF portfolios to protect.

    - **Add Files ….** Add one or more files to the list (you may use **Command** button to select multiple files)
    - **Add Open Files ….** Add one or more currently open files to the list.
    - **Delete**. Click Delete to remove selected files from the list.

3. In Security Method drop-down menu, choose Password Security or Certificate Security:

    - Select Password Security to open Password Security dialog box, in which you can protect selected files with password. See Securing PDFs with passwords.
    - Select Certificate Security to open Certificate Security dialog box, in which you can protect selected files with certificate. See Securing PDFs with certificates.

4. (Optional) Click **Settings …** to set up a security method. Click **Details** to view security information of the document.

5. Click OK to encrypt selected documents in batch.

Note: you are not able to encrypt signed or certified documents. To do so, remove the signature field by choosing Form > Reset Form Fields, or use a predefined Reset Form Fields button.

Security schemes

You can save the security settings you often use as a custom security scheme and use it later. Using security schemes, you do not have to re-enter passwords or re-add recipients every time you manage document security. If you often distribute files to the same recipients whenever you manage certificate-based security, you can save those recipients in a security scheme so that you can quickly apply the same security settings with just one click.

Open a PDF file and do any of the following to open the Security panel:

- Choose Security > Security Panel.
- On the Sidebar Navigation pane, click Security.

Create a new security scheme

1. Do the following to open the New Security Scheme dialog box:
    - In the Security panel, click the Create Security Scheme button.
    - Right-click anywhere inside the Security panel and choose Create Security Scheme from the menu.

2. In Appearance, you may select Use custom appearance and then click Select... to open the Select Image dialog box. Click Browse… to choose a file and then click Open, and then OK. Click Next > when finished.
3. In Appearance, you may select Use custom appearance and then click Select... to choose a file. Click Next >.
4. In Security Type, specify whether to apply password-based security or certificate-based security and then click Next >:
    - **Use password.** You need to enter the correct password to open the document or change permissions settings.

Save password with scheme. Check to store a password with the security scheme you are creating. You need to enter either an Open Password or a Permissions password, or both to finish creating this scheme. If not selected, you will be prompted to specify passwords and permissions whenever you apply this security scheme.

- **Use public key certificates.** It lets specified users access documents secured with certificates.

  Ask for recipients when applying this scheme. To create a scheme that is associated with individual documents, select this option and you will be prompted to specify trusted identities when you attempt to apply this scheme. On the other hand, for a scheme that is associated with individual recipients, don't select this option and you need to specify the trusted recipients to be saved to the scheme.

5. This step varies depending on the type of security you choose:
   - If you choose Use password (password-based security), follow the instructions to restrict access and usage of certain functions. See Restrict PDF editing, printing, and copying.
   - If you choose Use public key certificates (certificate-based security), select document components to encrypt and a type of algorithm, and click Next >. If Ask for recipients when applying this scheme is not selected, please select recipients from the Trusted Contacts box and click Add>> to add them to the Recipients box. Click Next >.
6. The Scheme Details area shows information of the security scheme you set. Click Finish to close the dialog.

View a security scheme

You can view security schemes in the Security panel, which is made up by two parts: Password Security and Certificate Security.

1. Open a PDF and do any of the following to open Security panel:

   - Choose Security > Security panel .

- Click Security  in Sidebar Navigation Pane.

2. To view detailed information of security scheme, right-click a security scheme and select Edit Security Scheme. In the Edit Security Scheme dialog box, click **Next >** to view the details of current scheme.

Apply a custom security scheme

1. On the Security panel do any of the following to apply the scheme to the document:
    - Right-click on an existing security scheme you want to apply to the document and select Apply Security Scheme.
    - Click the scheme and choose Security Scheme Option > Apply Security Scheme.
    - Double-click the scheme.
2. Click Yes to change the security settings of the document.
3. Click Save Now to apply the new security settings.

Edit a security scheme

You can edit the security settings of a security scheme using the Editing a Security Scheme dialog. However, you cannot change the security type of the scheme after it has already been placed under either password security or certificate security in the Security panel.

1. In the Security panel, do any of the following to edit a security scheme:
    - Right-click a scheme and select Edit Security Scheme from the options.
    - Click to select a scheme and then choose Security Scheme Option > Edit Security Scheme.
2. In the Editing a Security Scheme dialog box, make changes to general settings and other security settings.
3. Click Finish to close the dialog box.

Copy a security scheme

You can also make a copy of an existing scheme and its scheme name will start with the phrase Copy of, e.g. [Copy of _(name of the scheme__)]. It copies all the settings and you are free to make any changes to the security settings of the copied version.

1. In the Security panel, select a scheme to copy and do any of the following:
    - Right-click the selected scheme and select Copy Security Scheme from the options.
    - Click the selected scheme and choose Security Scheme Option > Copy Security Scheme.
2. In the Editing a Security Scheme dialog box, Right PDF has already set a scheme name for the copied scheme, but you can still edit it at will. Then, click Next > to make any changes if needed. View details in the Scheme Details area.
3. Click Finish to close the dialog.
4. The copy of the scheme is placed under the same security type in the Security panel.

Delete a security scheme

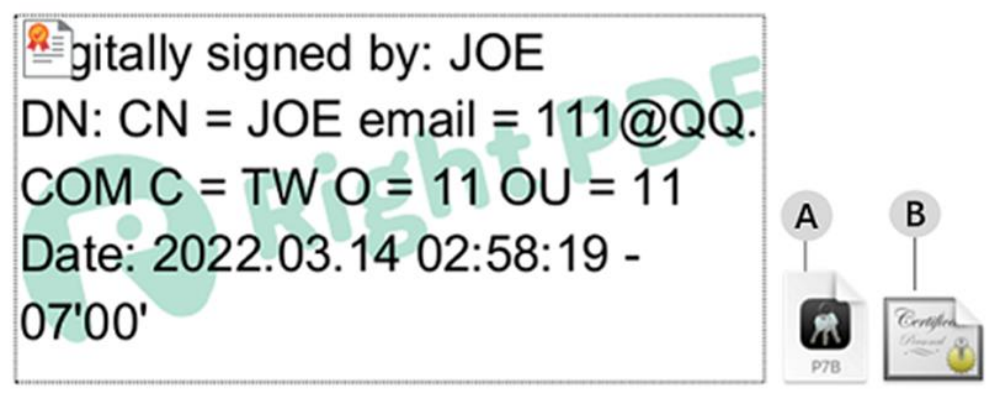
1. In the Security panel, do any of the following to remove a scheme from the panel:
    - Click to select a scheme you want to delete and press Delete on your keyboard.
    - Right-click a scheme and select Delete Security Scheme from the options.
    - Click to select a scheme and then choose Security Scheme Option > Delete Security Scheme.
2. Click OK to confirm you want to delete the security scheme.

Manage Digital IDs

What is a digital ID?

A Digital ID is like your passport or ID card that can prove who you are and contains important information, such as name, email address and expiration date.

A Digital ID consists of the public key used to encrypt documents and the private key used to decrypt data and apply your digital signature when signing. The public key is in a certificate which can be transferred and used to encrypt documents to prevent unauthorized access. Once you have your own Digital IDs, you can distribute the certificate to those who want to validate your digital signature or identity. Make sure you store your private key in a safe place to prevent others from using it to decrypt your information.



Digital IDs contain two keys: the private key and the public key. You use the private key (A) to unlock data and the public key (B) to encrypt data.

What can certificate IDs do?

- **Sign documents**. You can certify a document using certificate IDs so that recipients can make sure whether you are the person who signs the document.
- **Validate documents**. After receiving the signed document, you can validate all signatures to confirm the identity of each person who signs the document. To see if the document has been altered in transit, you can track all previously signed versions of a document to check for any changes made to the document.
- **Set permissions for recipients**. You can certify a document and make certain functions available to the recipients. Also, using certificates, you can encrypt documents and restrict the use of certain functions, such as printing, copying, and editing.

Create a self-signed digital ID

You may wonder how you can get a certificate. There are two ways to get one: create a self-signed digital ID or get one from a third-party provider. Once you create a self-signed digital ID, it will be automatically added to the list of digital identities in Security Settings dialog box under Manage Digital IDs.

1. In Right PDF, do any of the following:
    - Choose Security > Sign/Certify > Sign Document. Click-drag to mark a rectangle area anywhere on the page. In the Sign Document dialog box, click Add....
    - Choose Security > Sign/Certify > Certify Document. Click-drag to mark a rectangle area anywhere on the page. In the Certify Document dialog box, click Add....
    - Choose Security > Manage Digital Identities. In the left panel of the Security Settings dialog box, click Digital IDs and click Add ID....
2. In the Add Digital ID dialog box, select Create a Self-Signed Digital ID and then click Next.
3. Determine where to store your self-signed Digital ID and then click OK:
    - **New Digital ID File (PKCS#12 Format).** Select this to store the digital ID in a new file with password protection. The digital IDF file has the extension .pfx or .p12. Either file format is supported by most security applications, including major web browsers.
    - **Keychain Access.** Store the Digital ID in the Keychain Access where it will also be available to other Windows applications. The Digital ID will be protected by your Windows login.
4. In the Create a Self-Signed Digital ID dialog box, type a name, email address, and other personal information for your digital ID. The name you specify will appear in the Signatures panel and also in the Signature field when you certify or sign a document. The options vary depending on the type of digital ID you choose.
5. From the Use digital ID for menu, specify if you want to use the digital ID for signing digital signatures, data encryption, or both.
6. If you chose New Digital ID File at step 3, type a password for the digital ID file with a minimum of 6 characters, and then click Save.
7. Choose a location to save your digital ID, give it a file name, and then click Save to finish. The newly-created digital ID is automatically added to the list of digital identities. You can further click Export Certificate... to export a selected digital ID and then send your certificate file out to contacts who need to use it to validate your signature or encrypt documents with certificate-based security.

Note: make sure you always have a backup copy of your digital ID file. You cannot use the profile to add signatures if you don't have the correct password, or your digital ID file is damaged or lost.

Add a digital ID

You can choose to add an already existing digital ID from a file or create a self-signed digital ID that will be automatically added to your list of digital IDs.

1. In Right PDF, choose Security > Manage Digital IDs.
2. Click Add.
3. In the Add Digital ID dialog box, select Find an existing Digital ID from and then select either of the following:
    - **A file**. If you have obtained the electronic file of the digital ID, choose this option. Yoo will be further instructed to choose digital ID file, enter password and add it to the list.
    - **A device connected to this computer**. If you have a security token or a hardware token device connected to the computer, choose this option.
4. Click Next and follow the instructions to add Digital IDs.

Remove your digital ID

You can simply delete a digital ID in the Security Settings dialog box. When you delete a digital ID, you delete the actual PKCS #12 file (*.pfx or *.p12) that contains both the public key and the private key. However, the exported certificate remains unaffected.

1. IIn Right PDF, choose Security > Manage Digital IDs.
2. In the Security Settings dialog box, select Digital IDs from panel to the left and select the ID you want to remove from the list. Click Remove ID.
3. At the prompt, click OK to confirm you want to permanently remove the select digital ID.

Note: you can delete only self-signed IDs you created in Right PDF. The digital IDs obtained from other providers cannot be deleted.

Export a digital ID

1. In Right PDF, choose Security > Manage Digital IDs.
2. In the Security Settings dialog box, select a digital ID from the list and click Export Certificate....
3. In the Export Data dialog box, select an export option and then click Next:
    - **Email the data to someone.** Select to send the Personal X.509 Certification File exported from the selected Digital ID to your email address. The certification file attached contains a copy of a certificate that you can use to verify signature and encrypt documents for the selected digital ID.
    - **Save the data to a file.** Select to save the exported certificate to a specified location as a PKCS #7 Certificate File (*.p7b).
4. Your options vary depending on the export option you choose:
    - If you choose to email the exported certificate, in the Email Certificate dialog box, type your email address and click Email.
    - If you choose to Save the data to a file, name the Certificate file, specify a location, and then click Save.

Note: (1) the exported Certificates are usually used for verifying signatures and encrypting documents to limit access to the person who has the corresponding private key (the digital ID). (2) you can click Certificate Details... to view the certificate attributes of each digital ID.

Manage trusted identities

A Digital ID consists of the certificate that includes public key and other content, used to lock or encrypt documents, and the private key used to unlock or decrypt data. The public key is in a certificate which can be transferred and used to encrypt documents to prevent unauthorized access. When you sign, you use the private key to apply your digital signature.

You can get digital ID certificates from other people, signature validation process as well as certificate-based security workflows to build a list of trusted identities. During the signature validation

process, you verify the identity and add it as a trusted root. For certificate-based security workflows, you need to get certificates in advance for document encryption. Once you receive public key certificates from others, add them to your list of trusted identities so that you can encrypt documents for them. You also need the certificates to validate any PDF file they have digitally signed.

Add trusted contacts

You can import certificates to the list of trusted identities so that they can be used to implement certificate-based security and signature validation workflows.

1. In Right PDF, choose Security > Trusted Identities.
2. In the Manage Trusted Identities dialog box, click Browse.
3. In the dialog box, select the certificate file and click Open.

Note: you can click Details to view detailed information of a selected certificate, such as its serial number, the expiration date, fingerprints, and more.

Export trusted identities

You can export a selected certificate and contact data via email or save as a certificate file so that other users can add the data to their list of trusted identities.

1. In Right PDF, choose Security > Trusted Identities.
2. In the Manage Trusted Identities dialog box, select a trusted identity from the list and then click Export.
3. In the Export Data dialog box, determine whether you want to save the contact data to a file or share it via email and then click Next:
    - **Email the data to someone.** Select to send the Personal X.509 Certification File exported from the selected Digital ID to your email address. The certification file attached contains a copy of a certificate that you can use to verify signature and encrypt documents for the selected digital ID.

- **Save the data to a file.** Select to save the exported certificate to a specified location as a PKCS #7 Certificate File (*.p7b).

4. Your options vary depending on the export option you choose:
    - If you choose to email the exported certificate, in the Email Certificate dialog box, enter an email address for the recipient of the certificate, review the message, and then click Email. Then, an email client, such as Outlook or Windows Live Mail, appears with the public key certificate ready as an attachment. Click Send.
    - If you choose to Save the data to a file, name the Certificate file, specify a location, and then click Save.

Note: to delete a certificate, select a trusted identity from the list and click Delete to remove it from the list of trusted identities.

Signing PDFs

Signature types

You can apply different types of signatures based on the intent. There are two types of signatures you can apply to PDF files, depending on the intent of the signer and the author. You can have approval signatures, certification signatures, or both on your document.

- **Approval signature**. An approval signature is a digital signature which indicates your approval. You can use digital signatures to sign a PDF file multiple times and by different persons.
- **Certification signature**. A certification signature must be the first signature applied to a document. You can no longer certify the document once there is an existing certification signature. You can also restrict the types of changes other people can make to the document.

Sign a PDF

You can sign a PDF using either a digital signature or a handwritten signature to indicate your approval. A PDF can be signed with digital signatures multiple times and by different individuals. Your digital signature appears in the signature field when you sign a document and the appearance depends on the options you select through the Configure Signature Appearance dialog of the Preferences dialog box.

Sign with an existing digital ID

1. Open a PDF file and choose Security > Sign/Certify > Sign Document.
2. Drag your pointer to specify an area for the digital signature, or click an existing digital signature field.
3. In the Sign Document dialog box, select a digital ID from the Name drop-down menu and type the correct password associated with the selected digital ID in the Confirm Password field. You can click Details... to view the detailed certificate attributes. Click Next.
4. Select the appearance of your signature. To create a new look, click New and select options as needed.
5. Click Sign and save the file.

Sign with a new digital ID

1. Open a PDF file. Choose Security > Sign/Certify > Sign Document.
2. Drag your pointer to specify an area for the digital signature. Or, click an existing digital signature field.
3. In the Sign Document dialog box, click Add....
4. In the Add Digital ID dialog box, select Create a Self-Signed Digital ID and then click Next.
5. Then, in the Add Digital ID dialog box, specify where to save the digital ID, and OK.
6. In the User Attributes section, type a name, organization information, email address, and other information for your digital ID. The name you specify appears in the digital signature field when you sign or certify a document. As an option, if you want to use Unicode values for extended characters, select Enable Unicode Support and then define Unicode values in the appropriate boxes. In the Profile File section, type a password for the digital ID file and click OK. In the popup Save window, choose where to save the digital ID, and click Save,
7. Save the Digital ID and in the Sign Document dialog box, type the correct password associated with the digital ID into the Confirm Password field and then click Next.
8. Select the appearance of your signature or click New to configure the signature appearance. Click Sign and save the file.

Sign with a handwritten signature

You can sign a PDF document by typing, drawing, or importing an image of your preferred handwritten signature. You can add a new signature, delete or rename existing ones, set default, or get a preview in the Manage All Signatures dialog box.

Create a new handwritten signature

Open a PDF file or form you want to sign and choose Security > Handwritten Signature > Manage All Signatures. In Manage All Signatures dialog box, you can adjust the following settings:

- **Add**: Click the Add icon to add a signature. In the Add a Signature dialog box, choose a way to create a signature from the drop-down menu. When finished, enter a name in the Save the signature as field, and click OK:
    - Draw my signature. Draw your signature in the Draw it below field. The default color is black but you can click the Color palette to choose the color you want and define the Weight.
    - Type my signature. Type your signature in the Type the signature field. You can further adjust the text attributes.
    - Import an image as my signature. Click Browse to locate and select an image of your signature.
- **Delete a signature**: select a signature in the list and press Delete to delete it.
- **Rename a signature**: select a signature in the list, click Rename and type a new name, and click OK.
- **Set a signature as default**: set the signature you want to use as default.

Sign with a handwritten signature

1. Set the signature you want to use as default before you actually apply one to your PDF file.

2. Choose Security > Handwritten Signature > Place a Handwritten Signature.
3. Drag your pointer to specify an area where the selected handwritten signature appears and save the file.

Customize the appearance of a certificate-based signature

You can determine the look of your certificate-based signature by specifying graphic, text configuration, and text properties. For example, you can make the information visible and decide whether to include an image of your handwritten signature or your company logo. You can create looks for different purposes and select a look for a specified digital ID.

1. Choose Right PDF > Preferences…. Or press Command + K on your keyboard.
2. In the Preferences dialog box, click Signatures and in the Creation & Appearance section, click More....
3. In the Creation and Appearance Preferences dialog box, click New.... to create one or more signature appearances and store them for later use. Available appearances are listed in the Select drop-down menu under the Appearance section when you attempt to sign.
    - **Creation**. Decide whether to make it compatible with Adobe Acrobat and then set the text fields to display when signing. The selected fields are displayed in the Sign Document dialog box when attempting to sign.



    - **Appearance**. Set the graphic options and the text fields to display in the appearance. Click **New**... and name the appearance by adding a title used to identify the appearance. And then set graphic options, text fields to display and text direction in the following sections:
        - **Configure Graphic.** Choose to show nothing, an image, or the signer's name from the certificate. If you want to display nothing in your signature, select **No graphic**;

otherwise, select **Imported graphic** to show an image in the appearance. Click **File**... and browse to a file to be used as the image and click **OK**.

- **Configure Text.** Decide what to display in the appearance:
    a. **Name**. The name associated with the certificate used to sign it.
    b. **Location**. The location associated with the identity configured in Right PDF.
    c. **Distinguishing Name**. A name with identifiable information such as country, organization, organization unit, and so on.
    d. **Labels**. A label for each of the items above. For example, Digitally signed by, Location, Date, etc.
    e. **Date**. The date the file is signed. It displays local computer time.
    f. **Reason**. Reasons for signing.
    g. **Logo**. Display the logo or graphic on the background of the signature. The default logo is the Right PDF logo.
- **Text Properties.** Choose a direction (Left to right/Right to left) that is appropriate for the signer's language.

4. Click **OK**.

Certify PDF

You, as the author of the document, certify it to indicate you attest to its content and can also control the types of changes other people can make while retaining its certified status. For example, if you want to ensure the integrity of a completed report, you can certify the document before distribution, allowing recipients to fill out form fields and add comments only. Then, whoever receives the reports can do nothing but fill the form and add comments, or the document loses its certified status.

If there is a certification signature, it must be before all approval signatures. If there are other signatures in a document, you cannot add a certification signature. In addition, you can certify document with visible or invisible signature. As long as the signature is effective, you can see a ribbon icon  in the top left corner and on the Signature panel.

To certify a document:

1. Open a PDF file and choose Security > Sign/Certify > Sign/Certify Document.
2. Select one of the following as needed:
    - Select Certify Document to apply a visible certifying signature.
    - Select Certify Document Invisibly to apply an invisible certifying signature. If you choose this option, your signature appears only in the Signatures panel with details of allowed actions. (Security > Signatures Panel).
3. If you are certifying with a visible signature, you can either drag to create a signature field or place the signature in an existing signature field. To place a signature in an existing signature field, right-click on the field with the Hand tool and select Certify Document.
4. In the Certify Document dialog box, select a digital ID from the Name drop-down menu or click Add... to create a new digital ID. Then type the correct password in the Confirm Password field (if required), and specify the permitted changes others can make from the Allowed Actions drop-down menu. Click Next.
    - **Allow no changes.** Select this to disable all tools that can be used to change the document, such as editing, form filling, commenting, signing, and more.
    - **Allow form filling only.** All tools that can be used to change the document are unavailable except for form filling. It is helpful when you want to collect information without getting unwanted changes.
    - **Allow comments and form filling.** It allows only commenting and form filling (including digital signature field filling). For example, other users might need to apply their digital signatures or leave comments during a document review.
5. Select a desired appearance for the signature and then click Save.

Save the PDF using a different file name to avoid signing the original document.



A visible certifying signature with details including allowed actions and other details listed in the Signatures panel

Validate digital signatures

Validate digital signatures

You can validate a signature to verify the signer and the signed content when you receive a signed document. It helps ensure that the signer's certificate exists in your list of trusted identities and confirm if the signed content has been modified after it was initially signed. See Set signature verification preferences.

When the certifying signature is valid, an orange ribbon icon appears at the upper-left corner of the digital signature field as well as in the Signatures panel. See View verification details in signatures panel for details. By configuring verification preferences in the Preferences dialog box, you may enable automatic validation when the document is opened. See Set signature verification preferences for details.

Setting up digital signature validation

Digital signature validation helps you verify the authenticity of the signature's digital ID certificate status and document integrity. The validity of signatures depends on whether the signer's certificate exists in the validator's list of trusted identities (Security > Trusted Identities) and whether the signed content has already been changed since it was signed. You can configure the preferences in advance to decide whether signature validation occurs automatically when the signed document is opened.

Set signature verification preferences

1. Do any of the following to open the Preferences dialog box:
    - Press Command + K on your keyboard.
    - Choose Right PDF > Preferences….
2. Under the categories, select Signatures on the left. Under Verification, click More... and in the Signature Verification dialog box, check Verify signatures when the document is opened to enable automatically validating all signatures in a PDF document when it is opened. Select the following options as needed and then click OK:

Verification Behavior

- **When Verifying.** This allows you to choose a method to use for verifying signatures.
- **Require certificate revocation checking to succeed whenever possible during signature verification.** This checks certificates against a list of excluded certificates during validation. If this option is deselected, the revocation status for approval signature is ignored. This option is selected by default.

Verification Time

- **Verify Signature Using.** Decide how to check the digital signature for validity. Time at which the signature was created is selected by default, meaning you can check the time based on when the signature was created. You can also choose to check based on the current time or the time set by a timestamp server when the document was signed.
- **Use expired timestamps.** It allows using the secure time provided by the timestamp or embedded in the signature even though the signature's certificate has already expired.

Verification information

- Select the behavior of adding verification information to the signed PDF when saving signature. Default is **Ask When Adding**. You can also choose **Always** to add verification information automatically, or **Never** add it.

macOS Integration

- Specify whether to trust all root certificates in the Keychain Access when validating signatures or certified documents. Note that selecting either of these options may result in arbitrary material being treated as trusted content. We suggest you don't trust all root certificates since some of the certificates from the Keychain Access were not designed to be used for building trusted identities.

View verification details in signatures panel

The Signatures panel shows information about every single digital signature in the current PDF document as well as the change history of the document. Each digital signature has an icon

representing its validation status in the Signatures panel. You can expand each signature to check its detailed verification information.



Verification details listed in the Signatures panel

To open the Signatures panel, choose Security > Signatures panel or click on the Signatures panel icon in the Sidebar Navigation pane. In the Signatures panel, do the following to get more information about verification:

- Click Click to view this version to view the version of the document signed by the selected signature.
- View the time the document was signed, the signing method, the validation status, and the name.
- Right-click a signature to do the following tasks: verify the signature, clear the signature field, view the signed version, and compare the signed version to the current version.
- Click on the signature to jump to its location in the document. A dotted line appears around the selected signature.

Status icons for PDF documents

Do any of the following to view the validity status and other verification details of the signature:

- Using the Hand tool, click on the signature field on the page to display the Validation Status dialog which shows signature validity and other verification details.
- Using either the Hand tool or Select tool, right-click on the signature field and select Properties.....
- The Signatures panel displays signature validation status and other verification details. You can click the Click to view this version link to open versions of signed documents.

Validation Status	Icon	Meaning
Valid		The document is certified and the document has not changed in a way not permitted by the certificate.
Valid		The identity of the signer was successfully verified as a trusted identity, and the document hasn't been changed since this signature was added.
Valid		The identity of the signer was successfully verified. The revision of the document covered by this signature has not been altered, but there have been subsequent changes to the document. The current view of the document is not the same as when it was signed.
Invalid		The signature has been corrupted. The revision of the document covered by this signature has not been modified, but there have been subsequent changes to the document.
Validity Unknown		The identity of the signer was not yet able to be verified. The revision of the document that was covered by this signature has not been modified, but there have been subsequent changes to the document. The current view of the document is not the same as when it was signed.
Validity Unknown		The identity of the signer was not able to be verified. The revision of the document that was covered by this signature has not been verified, but there have been subsequent changes to the document.

Validate a digital signature

By configuring digital signatures validation preferences, you can enable validating signatures automatically when the document is opened. See Status icons for PDF documents for details. You may also manually validate the signature if it is unverified or of unknown origin. If the signature status shows validity unknown, you need to contact the signer about the problem.

1. Open a PDF document that contains a signature.
2. The signature validation occurs automatically if you have already enabled verifying the signature at startup. Otherwise, do the following to manually verify signatures:
    - Click on the signature field to validate the signature.
    - Right-click on the signature field and select Verify Signature.
    - Right-click on the signature you intend to validate in the Signatures panel and select Verify Signature from the menu.
3. The Validation Status dialog box appears, describing the validity of the signature. For more information about the signature, right-click on it and select Properties....
4. Check the signed versions of the document if the document has been modified after the signature was applied. Also, you may compare the signed version to the current version of the document to see the differences between the two versions. See View previous versions of a digitally-signed document for details.

Trust a signerâ€™s certificate

Signature validity relies on the authenticity of the digital ID certificate. The signature is valid if the signer's certificate has already been set as a trusted identity in the list of trusted identities; otherwise, the signature validity status becomes unknown.

Therefore, to validate a signature, exchanging certificates and adding them to your list of trusted identities are required. Alternatively, you can import certificates from a signature in a signed document and then set them as trusted roots. See Manage Trusted Identities.

Do one of the following to make a signature valid:

- **Manage your list of trusted identities**. In the **Manage Trusted Identities** dialog box, add a certificate and set it as a trusted root.

- **Directly add a certificate from a signature to your list of trusted identities**. In the **Signatures Properties** dialog box, click **Verify Identity…** and then click **Add as a Trusted Root**. The certificate of the signer's signature is added to your list of trusted identities and automatically set as a trusted root.

Configure Directory Servers

Directory Servers can be used to search for contact information and certificates when managing your list of Trusted Certificates and when encrypting documents using Certificate Security. You can configure a public directory server or obtain configuration information from your computer administrator for directory servers within your organization.

1. Open a PDF document and select Security > Manage Digital IDs.
2. In the Security Settings dialog box, select Directory Servers from the panel to the left. Then click on Add ... to create and set up a Directory Server, or directly select one from the list and click on Edit to view and change settings.
3. In the Edit Directory Server dialog box, edit the name the directory and server settings. If required, check the This server requires a log on option and enter a username and a password. Click OK.

Timestamp a document

By default, a digital signature contains a date and time. The digitally-authorized time stamp indicates the contents of the document existed at that time and have not been changed since then. You can configure a new time stamp authority and add it to the list of time stamp servers. The time stamp will show on the Date/Time tab in the Signature Properties dialog box. Otherwise, the current date and time of your computer will be used instead.

Set up time stamp servers

1. Open a PDF and choose Security > Manage Digital IDs.
2. In the Security Settings dialog box, select Time Stamp Server in the left-side window and then click Add....

3. In the Add Time Stamp Server dialog box, name the time stamp authority and enter its URL. Check The server requires you to log in if needed and then enter the user name and password. Click OK.

Add a document timestamp

1. Open a PDF you want to add a timestamp to and choose Security > Sign/Certify > Time Stamp Document.
2. In the Time Stamp Service dialog box, select an existing time stamp service from the list and click Next. If there isn't any existing one, click Add to add a new time stamp server.
3. In the Save as dialog box, choose a location to save the document with the timestamp and click Save.

Versions of the signed document

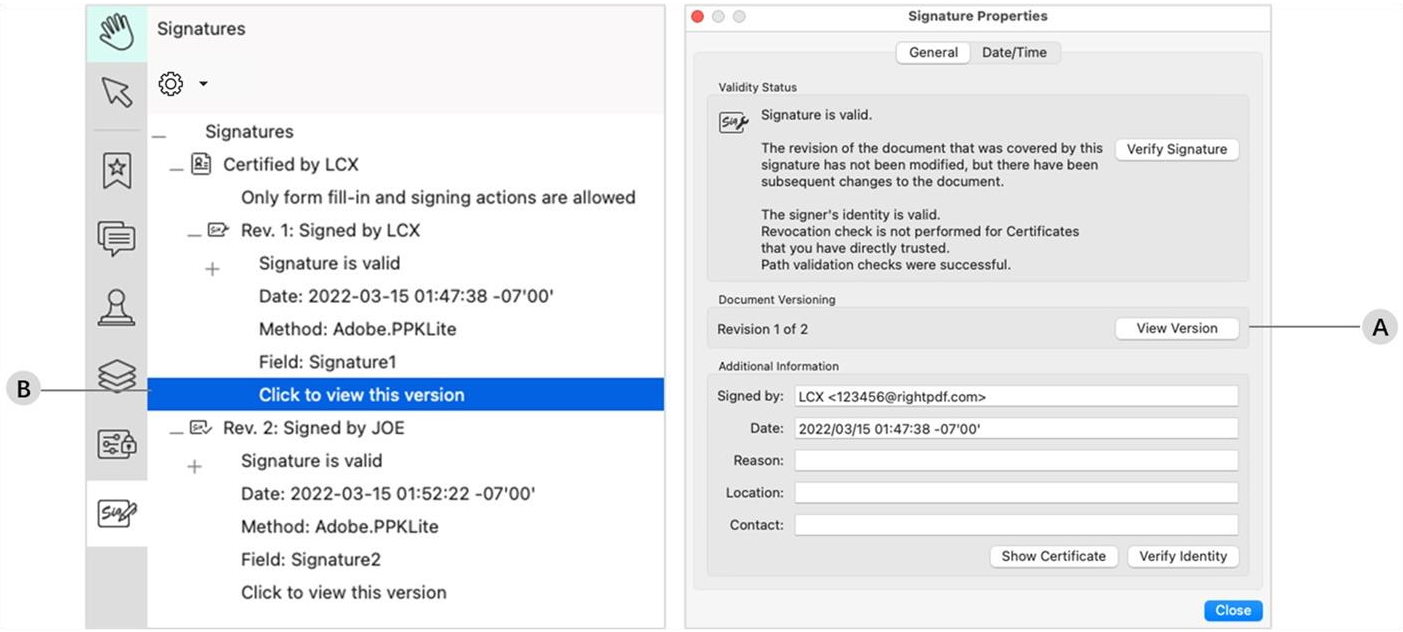
Each time you sign a PDF document using a certificate, the signed version of the document is saved with the PDF. You can access the signed version via the link in the Signatures panel or in the Signature Properties dialog box. The selected signed version of the document then opens in a new PDF document.

You can also compare the selected signed version with the current version. It marks the differences for you and generates a summary of comparison results in a new PDF document.

View previous versions of a digitally-signed document

1. Open a signed document with multiple digital signatures.
2. Do any of the following to view signed versions:
    - In the Signatures panel, expand the signature and click Click to view this version (B) to view its signed version. Or, you can click on the signature, and select View Signed Version from Signatures Panel Option menu.
    - Right-click on the signature and select View Signed Version from the menu.

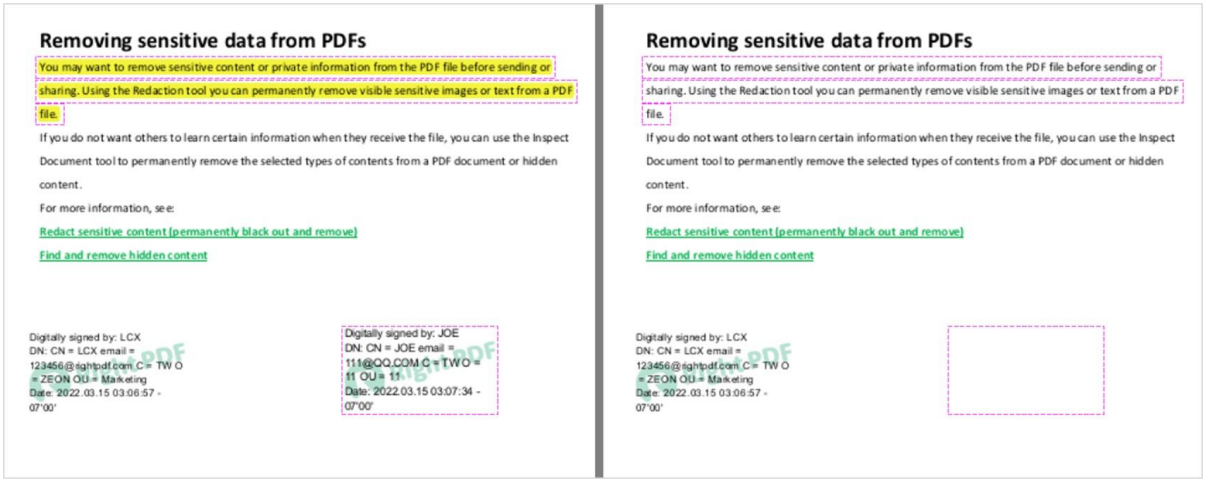
- Right-click on the signature field and select Properties.... In the Signature Properties dialog box, click the General tab and click View Version (A) in the Document Versioning section.



Compare the previous signed version to the current version

You can view what changes have been made after the selected signature was applied to the document. It marks all differences between the current version and the signed version of the document covered by the selected signature.

1. Open a PDF file.
2. Choose Security > Signatures panel.
3. In the Signatures panel, right-click the signature used to compare to the current version of the document and select Compare Signed Version to Current Version.
4. A page-by-page comparison opens in a new PDF document.



Compare the previous signed version (Right) to the current version (Left).

Send PDF documents with secure delivery

Security is always a concern when you need to send sensitive files to the recipients on the outside. Secure Delivery is a convenient wizard which helps protect a set of files to be delivered with passwords or signatures sending them out via email. Both PDF and non-PDF files can be protected using secure delivery.

1. Open a PDF and choose **Security > Secure Delivery**  .
2. In the **Secure Delivery** dialog box, go through the following four steps:

    - **Select Envelope**. Click to open the **Envelope panel.** Double-click the desired envelope or right-click and choose **Apply** to open it. You can use **Add Text** to add extra information onto the selected envelope.
    - **Add Attachments**. Click to add file attachments. In the dialog box, individually select one or multiple files and then click **Open**. All the selected files (both PDF files and non-PDF files) are displayed in the **Attachments** panel to the left in the envelope file. You can also attach a PDF portfolio that contains a collection of files.
    - **Encrypt Files**. Click to open the **Security** To apply the security scheme, directly click-drag an appropriate one to the document pane, or right-click and choose **Apply Security Scheme**. If there is no a security scheme yet that can be used, create one and apply it to the file.
    - **Sign Document**. Click to open the **Sign/Certify** panel, and select an appropriate signature scheme from **Sign Document**. Remember to save the document in order to apply the digital signature. If there is no a signature scheme yet, create one and then apply it to the file.

3. Click **Send** when the document is ready. Your default email application opens with the envelope file attached to a new message that contains instructions of accessing the secured attachment. Then, fill in the required fields, such as recipients and subjects, and click **Send**.

Envelope panel

The Envelope panel displays all envelopes available for secure deliveries via email. All types of envelopes are single-page PDF files with interactive form fields in which you can enter information related to the email package. You can also create a custom envelope template for secure deliveries.

Creating custom envelopes

You can create custom envelope templates that store specified security and signature schemes, and are displayed with the appearance you specify. First you need to prepare a PDF file to be used as an envelope. Then, you can add interactive form fields in which you can type information each time you apply the envelope. Alternatively, you can use the Add Text tool to do this as well.

1. Do any of the following to open the **Envelope** panel:
    - Choose **Security > Envelop**
    - Click the Envelope icon in the navigation sidebar

2. In the **Envelope** panel, do one of the following:
    - Click **Create** .
    - Right-click anywhere on the Envelope panel and select **Create** from the menu.
    - Click **Options** and select **Create** from the menu.

3. In the **Create Envelope** dialog box, click **Browse…** to navigate to the PDF file intended to be used as the envelope. Then set the name, appearance and signature scheme for the envelope. You can see how the envelope looks in the Preview area to the right.
4. In the **Properties** section, select a **Security Scheme** and a **Signature Scheme** from their respective drop-down menu and then click **OK**.

Use Options to manage envelopes

- **Apply.** Choose this to open the selected envelope. Do any of the following:
    - Double-click an envelope.
    - Right-click on it and choose **Apply** from the menu.
    - Select an envelope, click **Options** and then choose **Apply** from the menu.

- **Edit.** Choose this to make changes to the selected envelope in the **Create Envelope** dialog box. Do the following:
    - Right-click an envelope and choose **Edit** from the menu.
    - Select an envelope, click **Options** and then choose **Edit** from the menu.
- **Reduce/Enlarge Envelope Thumbnails.** Choose to fit the thumbnail sizes for the panel.
- **Reset Envelope.** Choose to restore the default envelopes by either replacing the current envelopes or appending system default envelopes to the current envelopes.

Microsoft Azure Information Protection (AIP)

Microsoft's Azure Information Protection (AIP) offers a method to protect important documents with security policies. As administrator, you can set up permissions for other Microsoft accounts, and only authorized accounts can access protected documents. For more information on how to set up permissions, please visit Microsoft Azure website.

Secure a PDF file with AIP

1. Open a PDF file in Right PDF.
2. Choose **Security > Microsoft Azure Information Protection**  **> Protect**. Click **Yes** to allow changing the security settings of the document.

   *If this is your first-time using AIP you need to enter your Microsoft username and password (admin).

3. In **Labels** dialog box, choose a label (configured by the administrator) that suits your needs.
4. Save the document to apply your security settings. You will see the document is protected by Microsoft Azure Information Protection in **Document Properties > Security Method** drop-down menu.
5. Now you can distribute the protected document. When someone attempts to open it with Right PDF, a Microsoft login window will appear, and only authorized accounts can open the document.

Removing sensitive data from PDFs

Removing sensitive data from PDFs

Before distributing documents, it's considerate to redact certain document contents to avoid possible legal consequences of exposing such sensitive information. The redaction tool lets you permanently black out a specified area or certain text, such as name, dates, or numbers, or images. You may further use the Search and Redact tool to search and remove specified words or phrases in one or multiple PDF documents.

The text or images you mark for redaction, by default, are outlined with red lines and will be blacked out when the cursor moves over the redacted areas. To change the default look of the redaction marks, you can change the settings in the Redaction properties dialog box before you use the tool.

Optionally, you may set redaction code to overprint an overlay text on the redacted area. Then you use Apply Redaction to permanently make all redacted contents unreadable. Since this command cannot be undone, make sure you save a copy of the document in case you need to access the original content of the document.

In addition, Whiteout can be used to remove contents permanently and backfill it with the color white.

If you do not want others to learn certain information when they receive the file, you can use the Inspect Document tool to permanently remove the selected types of contents from a PDF document or hidden content.

Redact sensitive content

Mark for redaction

Redaction tools are able to remove visible sensitive contents from a PDF file.

1. Choose **Security > Mark Redaction > Mark Redaction**. The pointer changes into I-beam over text and cross over images.
2. Do any of the following to mark redaction:

- **To mark text for redaction**
  - With the I-beam pointer, click-drag to mark the words to remove.
  - Double-click to mark a single word.
  - With the cross pointer, click-drag to mark a rectangle area that includes the content you want to remove from the PDF file.
- **To mark an image for redaction**
  - With the cross pointer, double-click on an image to mark an entire image for redaction.
  - With the cross pointer, click-drag to mark a rectangle area that covers the entire image or just a part of it.

3. (Optional) To repeat redaction marks, right-click on a redaction mark and choose **Repeat Mark across Pages**. This serves to mark headers, footers or watermarks in the same position across pages.
4. To permanently remove all marked content, choose **Security > Apply Redaction**.
5. At the prompt, if you want to permanently remove all marked contents, click **Apply**; otherwise, check **Apply marks visually only, preserving marked content** to black out only the marked text, without erasing the marked content. Click **Apply**.
6. At the prompt, if you want to run **Inspect Document** to see if there are other types of information that also need to be removed, click **OK**; otherwise click **Cancel**.
7. In **Inspect Document** dialog box, specify what types of information you want to remove from the document, and click **Remove**. See Inspect Document.

Note: after redaction is applied, all marked contents will be permanently removed and the operations cannot be undone.

Mark pages for redaction

1. (Optional) To edit the appearance of redaction mark, choose **Security > Redaction Tool Properties** .
2. Choose **Security > Mark Redaction > Pages** ….
3. In Mark Page Range dialog box, you can do the following:

- Select **Mark current page for redaction** to mark the current page. Click **OK** when finished.

- Select **Mark specific page range for redaction** and enter the page numbers in Page range. Click **OK** when finished.

4. To apply redaction, choose **Security > Apply Redaction** .

Whiteout

The Whiteout tool is like an eraser that can wipe out contents quickly and permanently, leaving only blank white behind.

1. Choose **Security > Whiteout** .
2. A pop-up dialog box will show. Click **Yes** to proceed. The pointer changes into cross.

Click-drag to mark a rectangle area that includes the content you want to erase from the PDF file. The whiteout effect will be applied immediately and cannot be restored by the **Undo** function. Don't save the document if you have applied whiteout by mistake.

Search and remove text

The Search and Redact tool searches multiple documents that contain searchable text for certain keywords or phrases and marks the matched results for redaction.

1. Open a PDF file that contains searchable text.
2. Choose **Security > Search and Redact**.
3. In the **Search** dialog box, specify whether you want to search the current document, portfolio, or all documents in another folder.
4. Next, select one of the following from the **Search For** options to define the scope.
    - Select **Single word or phrase** to search for only one word or phrase. Type the word or phrase in the What word or phrase would you like to search for text field and then click **Search and Redact**.
    - Select **Multiple words or phrase** to search for multiple words and then click **Select Words...**. In the **Words and Phrases to Search** dialog box, do any of the following to add

the words or phrases to the **Word and phrase list** box and then click **OK**. Enter each word in the **New word or phrase** text field and then click **Add**. Or click **import**... to import a text file that contains a list of words or phrases.

- Select **Patterns** to search for a pattern, such as SSN, phone numbers, credit card numbers, email address, and date. Select one from the drop-down menu and then click **Search and Redact**.
- Select **Arbitrary mask** to change the format category to custom and make another text field available, in which you can type a custom format.

5. Click **Search and Redact**.
6. All occurrences are listed in the search results dialog. If you search documents in a specified folder, you can click the plus sign next to each document name to see all occurrences within each document. Then do any of the following to select the occurrences you want to mark for redaction and click **Mark Selected Results for Redaction**.
   - Individually check the box for each occurrence you want to mark for redaction. You can click the text next to the checkbox to view the occurrence on the page.
   - Click **Select All** to select all occurrences in the list.
   - Click **New Search** to start over.
   - To mark whole words or partial words (characters) for redaction, select the option under **Redaction Mark Options**. For partial words, select **Mark Partial Word(s) For Redaction** and the **Settings** dialog box will automatically appear, in which you can specify the number and location of the words for redaction.
7. The selected items are shown marked for redaction in the PDF file they belong to. If you search documents in a specified folder, you will enter the **Output Options** dialog box, in which you can set the destination folder, file naming and output format options, enabling you to keep the original files redaction-free.
8. To permanently remove the selected items, choose **Security > Apply Redaction** and then click **Apply** and **OK**. The items are not permanently removed from the document until you save it.
9. Choose **File > Save** and specify a file name and location. If you do not want to overwrite the original file, give it a new name, location, or both and then click **Save**.

Change the look of the redaction marks

Open a PDF file and choose **Security > Redaction Tool Properties** to set the default look of all marks before applying redactions.

In the **Redaction Tool Properties** dialog box, on the **Display** tab, select the options you want to change and then click OK:

1. To change the color of the marks that cover the redacted contents, click the **Mark Color** colored square and then select a predefined color from the color palette.
2. (Optional) Select **Use Overlay Text** to overprint custom text or redaction code on the redacted items.

    - **Font**: click Edit... to edit font, size, color, and alignment, and determine whether to auto-size text to fit redaction area in the Font Editor dialog.
    - **Repeat Overlay Text:** select **Repeat Overlay Text** to fill the redacted area with as many instances of the custom text as possible.
    - **Custom Text:** select **Custom Text** and then specify the text to appear in the redacted area.
    - **Redaction Code**: select **Redaction Code** to overprint a type of code entry on redacted areas from a collection of entries called code set.
        - **Use default code sets and code entries**: Right PDF provides two predefined code sets, U.S. FOIA and U.S. Privacy Act you can use. Each code set has a collection of code entries you can choose one from.
        - **Custom code sets and code entries**: click **Edit**… to show the **Redaction Code Editor** dialog box, in which you can add, rename, delete code sets and code entries, and import or export a code set (.xml).

Redaction codes

You can select Use Overlay Text to overprint either custom text or redaction code on the redacted areas. For redaction code, Right PDF provides two predefined code sets, **U.S. FOIA** and **U.S. Privacy Act** you can use. Each code set has a collection of code entries you can choose one from. You may also import code set (*.XML) or save and export existing code set (*.XML) to a specified location.

Create code sets and redaction codes

1. Open a PDF file and choose **Security > Redaction > Redaction Tool Properties** .
2. In the **Redaction Tool Properties** dialog box, on the **Display** tab, select **Use Overlay Text, Redaction Code**, and then click **Edit**….
3. In the **Redaction Code Editor** dialog box, click **Add Set** . You can click **Rename Set**  to give the set a new name.
4. Click **Add Code** . Click **Rename Code**  and type the text to appear as overlay text.
5. Repeat the previous steps to add additional code entries to the code set.
6. Click **OK**.

Edit code sets and redaction codes

In addition to renaming and deleting code sets, you can also import a previously saved code set or export a code set to a XML file that you can reuse in other PDFs.

1. Open a PDF file and choose **Security > Redaction > Redaction Tool Properties** .
2. In the **Redaction Tool Properties** dialog box, on the **Display** tab, select **Use Overlay Text, Redaction Code**, and then click **Edit…**.
3. In the **Redaction Code Editor** dialog box, do the following to rename, delete, import, and export a code set:
    - To rename a code set, click on one and click **Rename Set**  . Type a new name for the selected set.
    - To remove a code set and the code entries thereof, select the code set and click **Remove Set** .
    - To import a previously saved code set (*.XML), click **Import…**. Select a (*.XML) file and click **Open**.
    - To export a code set to a XML file containing a collection of code entries that can be reused in other PDF files, select the code set and click **Export…**. In the **Save As** dialog box, specify a file name and location and then click **Save**.
    - Code Sets:

- To rename an entry, click on one and click **Rename Set**  . Type a new name for the selected entry.
- Click **Remove Set**  to remove the selected entry from the code set.

4. Click **OK**.

Inspect Document

The Inspect Document tool permanently removes the specified contents from the document, including hidden data, bookmarks, comments, attachments, deleted content, destinations, embedded thumbnails, form fields and actions, JavaScript, links, and metadata. To keep the original copy of the document, click Save As and specify a new name.

Note: you can determine whether to use the Inspect Document tool before you close or email a PDF using the Preferences dialog box (choose Right PDF> Preferences… > Document > Inspect Document.)

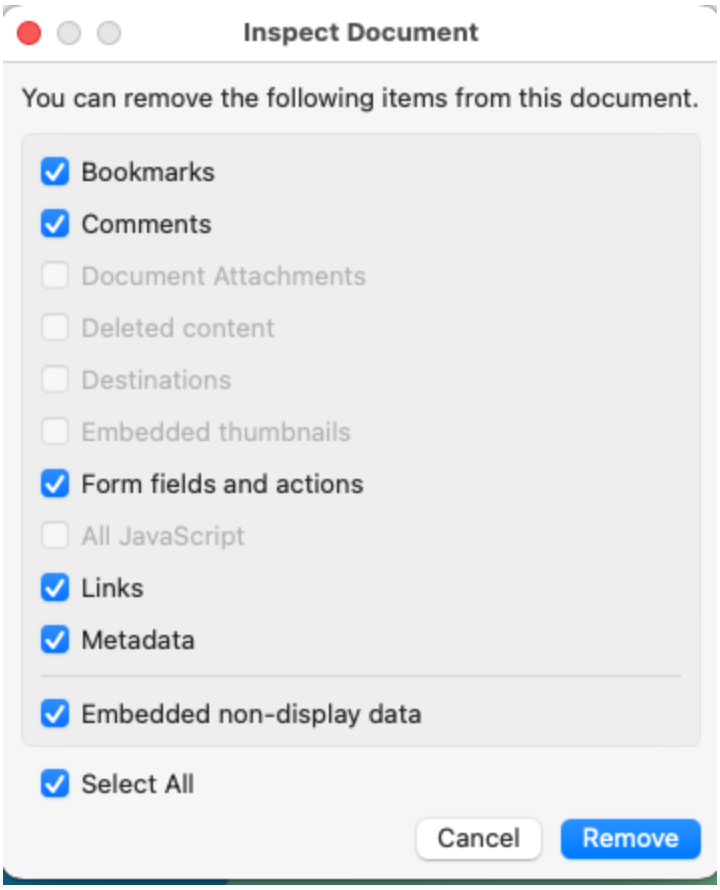
To permanently remove certain contents from a PDF

1. Open a PDF file and choose Security > Inspect Document to open the Inspect Document dialog box.
2. In the Inspect Document dialog box, select the items you want to remove from the document:
    - **Bookmarks**. Select to remove all bookmarks serving as links that lead you to specific pages in the PDF document. Choose Document > Bookmarks to open the Bookmarks panel.
    - **Comments**. Select to remove all comments added to the PDF document using markup tools, drawing tools, and basic tools such as text box, typewriter, and more. Click on the Comments icon on the Sidebar Navigation pane to open the Comment panel that displays all comments added to the document.
    - **Document Attachments**. Select to remove all files attached to the document. Click on the Attachments icon on the Sidebar Navigation pane to open the Attachments panel and view all attachments added to the document.

- **Deleted content**. PDFs sometimes retain deleted pages or images that are no longer visible in a document. Select this option to permanently remove content that has already been deleted.
- **Destinations**. A destination is a link to a certain location in the same or another document, represented by text in the Destinations panel. Select to remove all destinations from the document.
- **Embedded thumbnails**. Select to remove embedded page thumbnails from the document.
- **Form fields and actions**. This item includes all form fields and any other actions associated with form fields. Select to make all form fields within the PDF flattened, meaning they can no longer be filled out, edited, or signed.
- **All JavaScripts**. JavaScripts are interactive components that lead to commands or actions under specific conditions. Select to remove all JavaScripts throughout the document.
- **Links**. Select to remove all links associated with any actions from the document.
- **Metadata**. Metadata includes information about the document, such as author, keywords, date created and modified, and more. You can access it by choosing File > Properties or pressing **Command + D** on your keyboard. All information except for file name is removed if you use the Inspect Document tool to remove metadata from the document.
- **Embedded non-display data**. Select to remove invisible content visually blocked by other items, for example, removing invisible embedded text underneath an image.

3. Click Remove to remove the selected items from the document and then click OK.
4. You have to save the document to make the changes permanent. If you do not want to overwrite the original file, give it a new name, location, or both and then click Save.

Note: make sure to save the document to put the changes in effect.



Select the items to permanently remove corresponding information.

Chapter 10: Saving and exporting PDFs

Save a PDF file

It is so important to save PDF files and retain all contents you add. You have to frequently save the PDF document to prevent losing any changes. You can choose to save the changes to the original document instead of creating a new file or a new version that contains all changes you have made.

Save the original PDF document or Save As a new copy

Save is used to store any modifications you made to the original document without creating a new copy, while Save as creates a new copy that contains any modifications made to the original document. You can choose to save the file using either Save or Save As when saving a newly-created PDF for the first time. Both of them open the Save As dialog box. On the other hand, you can save a new version of an existing document under a new name, creating a new file that includes any changes you have made to the original document. This way, you save the changes to the new file while keeping the original unchanged.

1. Open or create a PDF file and start making any changes to it.
2. Do any of the following to save the PDF document:
    - On the Quick Access Toolbar in the top left corner of the interface, click Save.
    - Press Command + S, or Shift + Command + S on your keyboard to save the file.
    - Choose File > Save.
    - Choose File > Save As. Decide where to save the file. In the Save As dialog box, rename it to avoid overwriting the original one and then click Save.

Autosave

The Autosave feature prevents losing your work progress by automatically saving files at regular intervals. In the Preferences dialog box, set the autosave interval that ranges from 1 to 120 (minutes), which determines how much new content the autosave file would contain. For example, if you set the interval to 10, you could lose the last 9 minutes of your work if a problem occurs during the time (e.g. power outage). The recovered files are listed in the Auto Recovery panel.

Set up auto save

1. In Right PDF, choose **Preferences > General > Auto Save**.
2. Check **Automatically save document info with Auto Recovery every: ____ minutes** and enter the number of minutes.

Recover lost changes after an unexpected application shutdown

1. Launch Right PDF or open files using Right PDF.
2. All the autosave files are listed in the **Auto Recovery** panel to the left. Double-click on one or multiple files to open.
3. Save them with the same filenames as the file you are working on.

Save the PDF document to 3rd party cloud storage services

Right PDF enables you to save PDF documents to 3rd party cloud storage services, such as Dropbox, OneDrive, Google Drive or SharePoint. You can access the files through their own web interface or within Right PDF.

1. Open or create a PDF document.
2. Choose File > Save as.
3. In the Save as dialog box, choose an account t under Location and click Save. To add a new account, click Add Location.

Export PDFs to other formats

Using either Save As or the Export function in Right PDF, you are able to export the currently open PDF document to Text, Word, Excel, PowerPoint, Open Document Text and other image formats.

Supported file formats

- **PDF to Word.** Right PDF (macOS) supports .doc and .docx. Created Word files retain the same names as the original documents.
- **PDF to Excel**. Right PDF (macOS) supports .xls and .xlsx. Created Excel files retain the same names as the original documents.
- **PDF to PPT(PowerPoint).** Right PDF (macOS) supports converting PDF to PowerPoint (*.pptx). Created PowerPoint files retain the same names as the original documents.
- **PDF to image**. Right PDF (macOS) supports JPEGã€JPEG 2000ã€PNG, and TIFF. Each page of the original documents is converted to images and saved separately to the folders with the same name as original documents.
- **PDF to text.** Right PDF (macOS) supports *.txt in Simple and Unicode encoding.
- **PDF to ODT(Open Document Text).** Right PDF (macOS) supports converting PDF to Open Document Text (*.odt). Created Open Document Text files retain the same names as the original documents.

Export using Save As command

1. Open a PDF file and choose File > Save As. Choose My Computer > Save in Recent Folder…, and select a recent folder or click Choose Other…. If you want to save it to a cloud storage service, add an account and choose it.
2. In the Save As dialog box, type a name and select a file format.
3. If “Setting” is available, click on it to change format-specific conversion settings; if “Range” is available, click on it to set which pages to export.
4. Click Save.

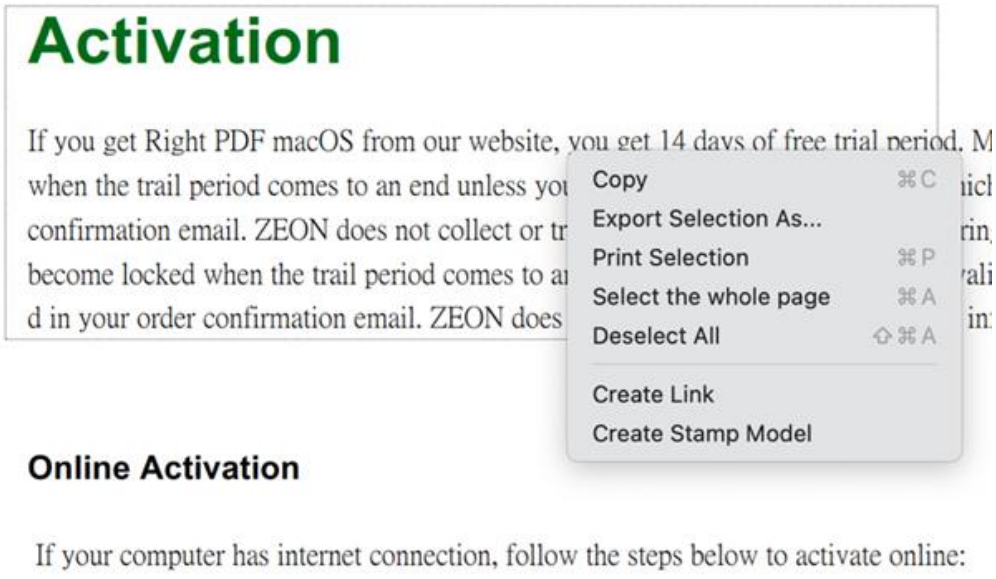
Export using Export functionality

1. Open a PDF file and select File > Export.
2. Select the file format and version for the output file.
    - **Export to MS Office.** You can choose to export PDF to Word (*.doc or *.docx), Excel Word (*.xls or *.xlsx), PowerPoint (*.xlsx), or OpenDocument(*.odt).
    - **Export to Image.** Select to export the PDF file to one of the four image formats. Each page of the PDF document will be saved as a separate file.
    - **Export to Text.** Select to export the PDF file to text in either Simple (*.txt) or Unicode (*.txt) encoding.
3. In the Save As dialog box, select a location where you want to save the file.
4. Click "Settings" and adjust the conversion settings in the pop-up dialog box, and click "OK". See Conversion settings for details.
5. Click “Range” and choose between exporting all pages or specific pages.
6. Click Save to convert.

Export selection to other formats

If you only need to export a part of the document to other formats, do as follows:

1. Open a PDF file.
2. Choose Basic > Select Area. Click and drag to select the area to export.
3. Release the mouse and in the popup dialog box, choose **Export Selection As**.



4. In the Save as dialog box, type a name and select a file format.
5. Click **Save**.

Advanced Conversion settings

Before you click the Convert button, you may go to Convert Settings to change settings related to the output format. You can also enable OCR (select only the languages used in the document to boost accuracy) to make text searchable.

Image settings

In the Save As JPEG/JPEG2000/PNG/TIFF Settings dialog box, set up File Settings and Compression Settings and then click OK, or you can click Default to restore default settings:

- **JPEG and JPEG 2000**
  - **File Settings.** Specify a color space and resolution for the output file. You can select Determine Automatically to let Right PDF automatically determine these settings for you.

        - **Colorspace.** Specify the type of color management applied to the output file. To convert color images in the file to shades of gray, choose Grayscale.
        - **Resolution.** Specify the resolution for the output file.
    - **Compression Settings.** From Grayscale and Color, specify compression settings that balance file size with image quality. The smaller the file, the lesser the image quality.

- **PNG**
    - **File Settings.** Specify a color space and resolution for the output file. You can select Determine Automatically to let Right PDF automatically determine these settings for you.
        - **Colorspace.** Specify the type of color management applied to the output file. To convert color images in the file to shades of gray, choose Grayscale.
        - **Resolution.** Specify the resolution for the output file.
    - **Compression Settings.** Configure compression settings using the Interlace and Filter menus.
        - **Interlace.** Specify if the image is interlaced. If you select None, an image displays in a web browser only when downloading is complete. The other option, Adam7, creates an image that displays low-resolution versions in a browser while the full image is still downloading. Adam7 seems to shorten the download time yet it increases file size.
        - **Filter.** It lets you select a filtering algorithm.
            - **None.** Compress the image without a filter.
            - **Sub.** Optimize the compression of images with even horizontal patterns or blends.
            - **Up.** Optimize the compression of images with even vertical patterns.
            - **Average.** Optimize the compression of low-level noise by averaging the color values of adjacent pixels.
            - **Paeth.** Optimize the compression of low-level noise by reassigning adjacent color values.
- **TIFF**
    - **File Settings.** Specify a color space and resolution for the output file. You can select Determine Automatically to let Right PDF automatically determine these settings for you.

        - **Colorspace.** Select the type of color management applied to the output file among RGB, CMYK, Grayscale, or Monochrome. To convert color images in the file to shades of gray, choose Grayscale.
        - **Resolution.** Specify the resolution for the output file.
    - **Compression Settings.** Configure the compression settings using the Monochrome, Grayscale and Color settings.

Word settings

In the Save As Doc/Docx/ODT Settings dialog box, select options as needed and then click OK or click Default to restore options to default settings:

- Image Settings
    - **Convert Images.** It converts images within the file to a specific image type.
    - **Clip Images so they look the same as in PDF.** Convert files without changing the position of each image.
- Path Settings
    - **Convert path objects to Drawing Objects.** Check this box to convert path objects (e.g. Clip Art images) to corresponding image objects.
    - **Group huge numbers of path objects together and convert to images to reduce file size.** To reduce files size, check this box to group huge numbers of path objects together and convert those to images.
- Font Settings
    - **Use similar fonts to replace fonts not installed on your system.** Check this box to allow Converter to replace fonts not installed in your system with other similar fonts.

- Layout Settings
    - **Identify Tables In PDF.** Check this box to ensure the tables in the PDF file will also show up in Word.
    - **Use Textboxes to keep layout consistent.** Inaccuracies may occur during the conversion process. Check this box to let Converter create text boxes for you to keep all the words and images in the intended places in Word.

    - **Identify Paragraphs In PDF.** Check this box to ensure paragraphs in PDF files will also show up in Word.
    - **Apply vertical text flow to all texts regardless of vertical font in the document.** Check this box to apply vertical text flow to all text in Word.
- **Languages to recognize**
  You can select one or more languages for OCR.
    - **Automatic language detection.** Select to enable. It analyzes the content of the source document and assign a language to each page. You cannot manually select OCR language if this is enabled.

Excel settings

In the Save As Excel Settings dialog box, select options as needed and then click OK, or you can click Default to restore options to default settings:

- **Page Handling**
    - **Convert all pages on a sheet.** Convert all pages and merge them into one Excel worksheet.
    - **Split each page on a sheet.** Convert each PDF page into separate Excel worksheet.
- **Image Settings**
    - **Convert without images.** If you check this box, images in the PDF file will not be converted into the Excel document.
    - **Turn white background transparent.** Convert images with white background made transparent.
- **Border**
    - **Split sparse cell. Check this box to keep sparse text in the same format as in a PDF file.** If this box is not checked, words in cells may be misaligned based on settings, such as aligning to top, center, left, right, and bottom.
    - **Try building border-less table.** Check to better recognize tables with no borders in PDF.

- **Languages to recognize**
  You can select one or more languages for OCR.

- **Automatic language detection.** Select to enable. It analyzes the content of the source document and assign a language to each page. You cannot manually select OCR language if this is enabled.

PowerPoint settings

- **Retain**
  - **Rule Lines**. Keep or remove vertical and horizontal dividing lines between paragraphs.
  - **Headers and Footers**. Select this to detect headers and footers and transfer them to PowerPoint; deselect to transfer them as normal text.
  - **Hyperlinks**. Select this to detect and transfer hyperlinks; deselect to transfer link text as normal text.
  - **Text and Background Color**. Select this transfer text and background colors to the PowerPoint document; deselect this to make all text transferred black, and colored or shaded backgrounds white.
- **Languages to recognize**
  You can select one or more languages for OCR.
  - **Automatic language detection.** Select to enable. It analyzes the content of the source document and assign a language to each page. You cannot manually select OCR language if this is enabled.

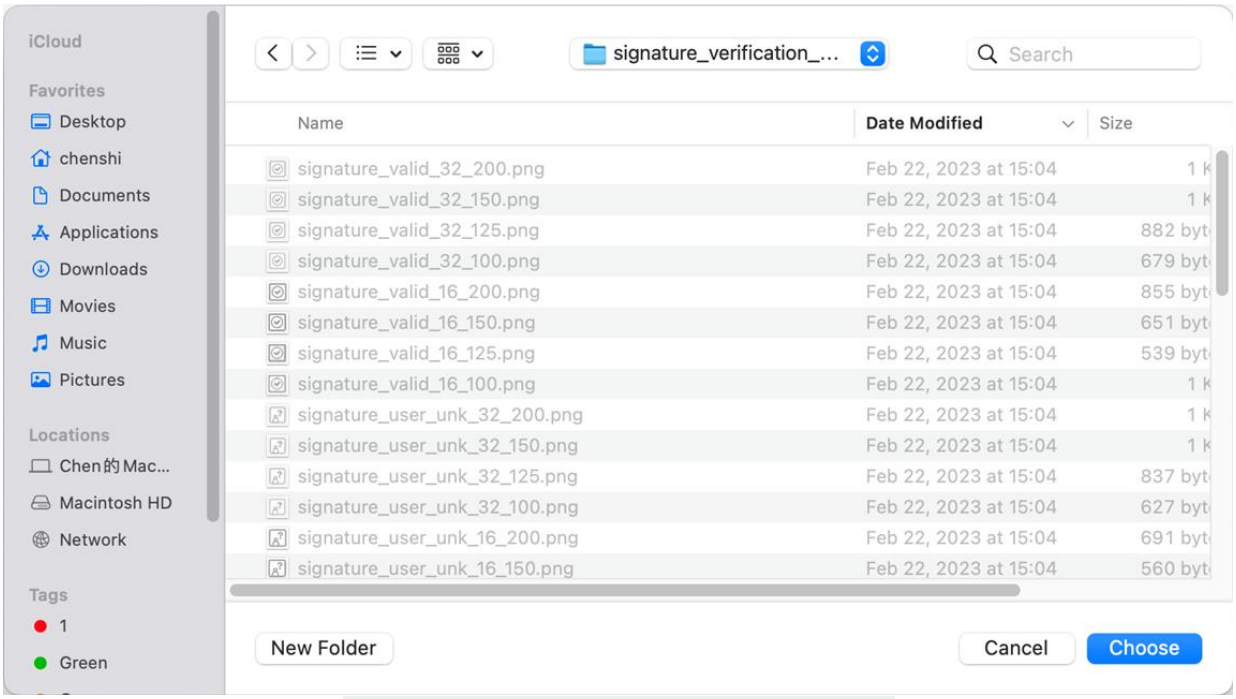
Export images from PDF

Besides exporting every page to an image format, you can also extract images from a PDF document and save them as separate image files.

1. Open a PDF file that contains images.
2. Do either of the following:
   - Choose Advanced > Export All Images.
   - Use the Select tool to click on the image and on the toolbar that pops up, select Save all image(s) to file(s)....

- To export a part of an image, using the Select tool, hover the cursor over the image and the cross-hair icon appears. Drag an area, right-click on it, and select Save Image As... from the options.

3. In the Save As dialog box, select target folder and click Save.



Select where to save exported images.

Reusing PDF content

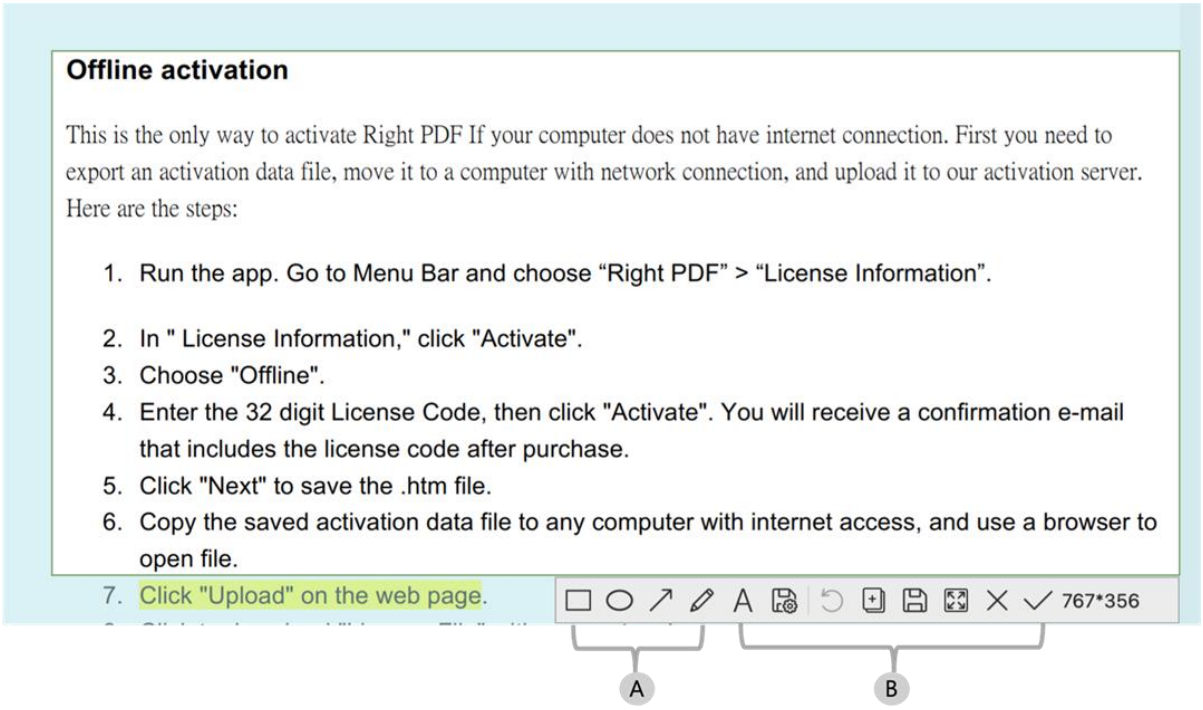
Capture a screenshot of a page

Using the Screenshot tool, you can copy a part of content to the clipboard or to other applications. You can also create a PDF file using the selected content from the clipboard. Both text and images are copied as images.

To take a snapshot of a page

1. Open a PDF file and choose **Advanced > Screenshot**. You can decide whether to hide the current Right PDF window before capturing a screen.

2. Click-drag the cross-hair pointer to form an area and then release the mouse.
3. The screenshot toolbar beneath the selection area offers you the following functions:
    - **Copy.** It copies the selection to the clipboard.
    - **Save as…**. Save the selected content to a specified location.
    - **Select the entire screen**. It captures the entire screen and automatically pastes it to the current PDF page.
    - **Done**. Paste the selected area to the current PDF page.



***The screenshot toolbar**: **A**. Draw tools **B.** (from left to right) Text; Save setting; Undo: Copy; Save as…; Select the entire screen; Done; Cancel*

To create a PDF file using the selected area from Clipboard

1. Open a PDF file and choose **Advanced > Screenshot** .
2. Click-drag the cross-hair pointer to form an area and then release the mouse.
3. On the Screenshot toolbar, select **Copy** .
4. Choose **File > New > From Clipboard** and then a new PDF file is opened within the Right PDF displaying the selected area.

Select and copy text and images

Using the Select tool, you can select and copy the selected items, such as text, images, and tables from a PDF into another application. However, if you find the text cannot be selected, the text may possibly be a part of an image. If the text cannot be cut, copied or pasted, please check if the author of the file has set permissions to copying file content.

To select and copy text

1. Open a PDF file that contains the content you want to copy and do either of the following to select text:
    - **To select a part of the page (text only)**. Using the Select tool, drag your cursor and draw a rectangle to select a part of the page. Alternatively, click-drag from an insertion point to an end point or drag diagonally over the text.
    - **To select all text of the current page**. Go to **View > Scroll Options** and select **Single Page** from the **drop-down menu**. Then right-click on the page and select **Select All** from the menu, or press **Command + A** on your keyboard to select all text of the current page.
    - **To select all text of a file**. Go to **View > Scroll Options** and select an option other than Single Page from the **drop-down menu**. Then right-click on the page and select **Select All** from the menu. Or, you can press **Command + A** on your keyboard to select all text.
2. Do one of the following to copy the selected part of the text:
    - Right-click on the selected text and select **Copy** from the menu.
    - Press **Command + C** on your keyboard.
    - Choose **Basic > Copy**  .

To paste copied text

You can paste copied text into bookmarks, comments or documents in other applications, such as Word or Excel. To paste copied text into a PDF document, use the Edit tool.

- **Paste to files created in other applications**
    1. Open the program (e.g. Word) that creates the file you want to paste the copied text to.
    2. Right-click wherever you want the content to appear and select **Paste**. Alternatively, click on the place you want the content to appear and press **Command+ V** on your keyboard.
- **Paste to a PDF document**
    1. Choose **Advanced > Edit**  .
    2. Specify where you want to place the copied text and do either of the following to paste the text:
        - Right-click wherever you want the content to appear, and select **Paste**.
        - Click on the place you want the content to appear and press **Command+ V** on your keyboard.

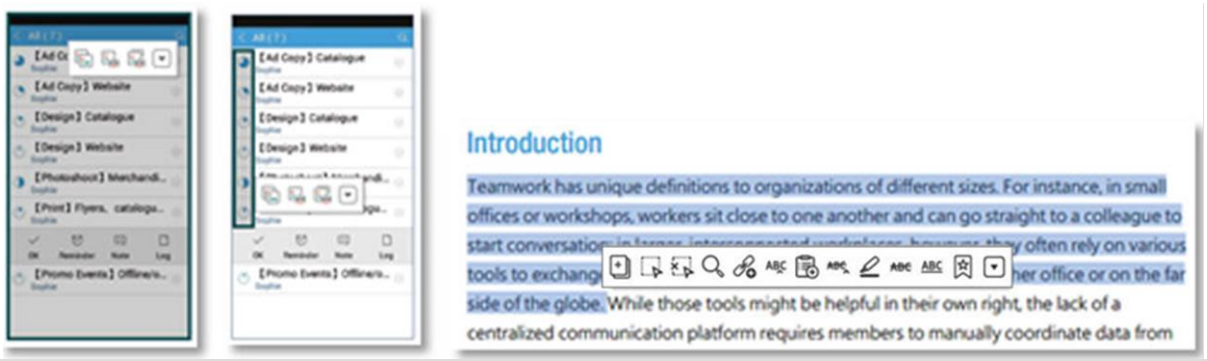
To select and copy images

1. Open a PDF file that contains images and click **Select** tool on the Sidebar Navigation pane.
2. Using the Select tool, select an entire image or just a part of an image by doing the following:
    - To select an entire image, hover the cursor over the image and then click on it while the cross-hair pointer  The entire image is highlighted.
    - To select a part of an image, hover the cursor over the image and the cross-hair pointer appears. Click-drag to specify an area to be copied.
3. Do the following to copy the selected part of the image:
    - Press **Command + C** on your keyboard.
    - Right-click on the selected part of the image and select **Copy Image** from the options menu.
    - Choose **Basic > Copy**.

To paste the selected image

You can directly paste the copied part of an image into a PDF document or documents in other applications, such as Word, Excel, PowerPoint, etc.

1. Open the program you want to paste the copied image to.
2. Click on the place where you want the image to appear and press **Command+ V** on your keyboard.



Select an image (Left) Select a part of an image (Mid) Select text by dragging from an insertion point to an end point or by dragging diagonally over text(Right).

Select Area

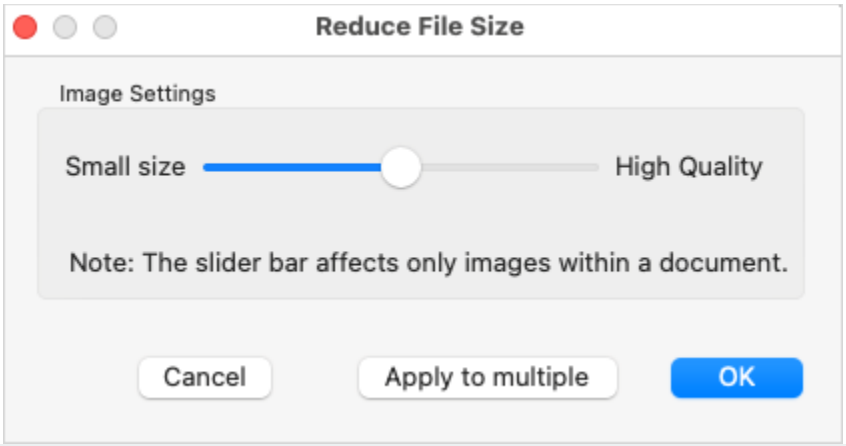
You can select an area on the page and copy, export or print the content.

1. Open a PDF file and choose **Basic > Select Area**.
2. Click-drag a rectangle on the page. A menu appears when you finish dragging, and you can do the following:
    - **Copy**. Copy the selected area to the clipboard. You can then open a document (e.g. Word), click on the spot you want to paste the selection to, right-click and select **Paste**. Alternatively, press **Command + V** on your keyboard to paste.
    - **Export Selection As**. Export the selected area to a file format of your choice, such as PDF, image, text.
    - **Print Selection**. Print the selected area.
    - **Select the whole page**. Replace the current selection with the whole page.
    - **Deselect all**. Deselect the area.

- **Create Stamp Model**. Use the selected area to create a stamp.
- **Create Link.** Use the selected area to create a link.

Reduce PDF file size

Right PDF provides various ways for you to reduce the size of PDF files. You can choose to remove unwanted data from a PDF file or shrink the images the file contains.



Using the slider bar in the Reduce File Size dialog box, you can choose a predefined size/quality ratio.

1. Open a PDF document and choose Advanced > Reduce File Size.
2. Reduce File Size provides five predefined ratios you can choose from to decide the most ideal outcome. If you choose to go for higher compression, you get smaller file size with less image quality, whereas you can use lower compression for higher image quality.
    - Level 100 (least compression, highest quality)
    - Level 75
    - Level 50 (the default ratio, Medium compression, medium quality)
    - Level 25
    - Level 0
3. Specify where to save the result file and name it, then click Save.
4. To apply the ratio to multiple documents, click Apply to multiple, add the files you want to compress and then click OK:
    - Click Add Files... to add multiple files to the list. Select one or more files and then click Open. Click Add Open Files... to add currently open files to the list. Command-click to select multiple files and then click Add Files.

- In the Output Options dialog box, follow the on-screen instructions to specify Target Folder and File Naming for the output files as needed and then click OK.

Note: the slider bar affects only images within a document.

Flatten documents

The Flatten feature merges interactive forms and any other comments in a PDF document. It is especially useful at the end of a review because you can be assured the information would not be edited, moved, or deleted by others.

Note: flattening cannot be undone and all the undo operations are removed.

Upon flatting, annotations and other items are removed from the panels they used to be displayed in and fused with the document so that no one will be able to select or modify them.

1. Open a PDF file and choose Advanced > Flatten.
2. In the Flatten dialog box, select the types of annotation and other items you wish to flatten and click OK:
    - **Draw**. It indicates the annotations placed by drawing tools. Once the document is flattened, all the drawing objects are removed from the Comment panel and can no longer be selected or modified.
    - **Attach**. All the attachments in the document are displayed in the Comment panel. Once the document is flattened, they are removed from the Comment panel and can no longer be opened. Meanwhile, the file attachment icons remain at where they were but lose their availability. Note that files attached by Document > Attachments are not affected.
    - **Textbox**. All textbox annotations created by the Text Box tool are displayed in the Comment panel. Once the document is flattened, they are removed from the Comment panel and can no longer be modified, resized, or moved. The text previously entered in the textbox can still be read but cannot be edited.
    - **Note**. Notes placed by the Note tool are displayed in the Comment panel. Once the document is flattened, they are removed from the Comment panel and can no longer be opened and edited. The sticky note icons remain at where they were but lose their availability.

- **Stamp**. Stamps are placed by the Stamps tool and can be moved and resized with the Select tool. All stamps in the document are displayed in the Comment panel. Once the document is flattened, they are removed from the Comment panel. The stamps remain visible but can no longer be modified or moved.
- **Layer**. Layers are created in Layer panel. Once the document is flattened, all layers are transformed as document objects and merged into the document. In the Layers panel, you can also choose Options > Merge Layers to flatten only layers.
- **Text Markup.** Once the document is flattened, highlights, cross-out, underline and other text markups remain visible but can no longer be deleted or selected.
- **Form**. All form fields are no longer interactive.
- **3D**. All 3D models created by Multimedia are shown in document pane and displayed in the Model Tree panel. After you add a 3D object, click on it or right-click and choose Activate 3D with the Hand tool to activate it. However, once the document is flattened, they are removed from the Model Tree panel. The 3D objects remain visible but can no longer be activated and edited.
- **Movie**. Movie clips are placed by Multimedia. Once the document is flattened, all movie clips in your document cannot be run or edited anymore.
- **Redaction**. Flattening the file preserves the completed redaction (redacted content is permanently removed), while the content only marked for redaction remains viable and searchable.

Print PDF

Print PDF files

1. Make sure that you have a printer connected to your computer.
2. To print a single PDF file, open a PDF with Right PDF and do one of the following:

   - Click the Print button on Quick Access Toolbar.
   - Press Command + P on your keyboard.
   - Choose File > Print.

3. To print multiple PDF files, open Right PDF and choose **File > Batch Print**, and in the Print dialog box, do the following:

- Click **Add Files … > Add File …** to add files to the queue (or select Add Folder … to include all files therein). In the Open dialog box, select a file.
- You may select **Include All Open PDF Documents** to add all currently open PDF files to the queue.
- After files are added, select one from the list, and click **Page Range Options …**to decide which pages to print.
- In Files list, click **Move up** or **Move down** to change the printing order, or click **Remove** to delete selected files.

4. Select a printer and adjust other settings as needed. See About Print dialog box for more information.
5. Click **Print** to start.

Print Document Tab

You can print one or more currently open Document tab files by following the steps below:

1. Right-click a tab, select **Print Current Tab** to print the current file, or select **Print All Tabs** to print all currently open files.
2. In Print dialog box, adjust the settings as needed and click **OK**.

Print a Part of the Page

1. Click Basic > Select Area.
2. Draw a rectangle to select a portion of a page.
3. In the popup menu, select **Print Selection**.
4. In Print dialog box, adjust the settings as needed and click **OK**.

About Print Dialog Box

- **Printer.** Choose a printer from the list of printers installed on the computer. Click Properties … to adjust printer settings. To learn more about printer settings, see Mac print dialog box help.
- **Copies.** Set how many copies you need.
- **Collate.** When printing more than one copy of a multi-page document, pages are printed in the correct order from the first page to the last page, before the next copy is printed. This becomes unavailable when you print only one document.
- **Print Content**
    - **Document and comments**. Print document content, form fields and annotations.
    - **Document content**. Print document content and form field. Annotations excluded.
    - **Form fields only**. Print only interactive form fields.
- **Print Range:** Specify the pages or range of pages to print.
    - **All pages.** Print all pages in the document.
    - **Current page.** Print only the current page.
    - **Current view.** Prints the area currently visible. Unavailable when the current view includes multiple pages.
    - **Selected area**. Print the area specified by the Select Area tool.
    - **Page range**. Print the range of pages you specify. Use a hyphen to separate numbers in a range, and use a comma to separate individual pages or ranges (for example, 6, 10-31, 42).

      Tip: if your PDF contains formatted page numbers, and the **Use logical page numbers** is selected in Preferences … > Page Display, you need to enter numbers that match the numbering on the pages. For example, if the first page of a document is numbered 42, you have to enter 42 to print that page.

    - **Subset**. Choose to print all pages in range, odd pages only, or even pages only.
    - **Reverse pages.** Print pages in reverse order. Not available when printing only 1 page.
- **Print Handling**
    - **Size:** Scale pages for printing**.** This is used to print each page on a paper respectively.
        - **Fit to paper.** Shrink or enlarge pages to fit the paper.
        - **Actual size.** Print the pages without scaling. Pages or selections that don't fit on the paper will be cropped.
        - **Shrink oversized pages**. Shrink large pages to fit the currently selected paper size, but does not enlarge small pages. If an area is selected and is larger than

the printable area of the currently selected paper, it will be scaled to fit the printable area.
        - **Custom size**. Specify a percentage to scale pages.
        - **Auto-rotate and center**. Automatically select the page orientation that best matches the content and paper, and also make the content center-aligned. This option overrides the orientation selected in Page Setup.
        - **Remove margins**. Remove page margins.
    - **Poster:** scale large format document like poster or banner to print-friendly sizes, and split the page across multiple sheets.
        - **Tile Scale**. Scale the pages by the percentage you specify.
        - **Overlap**. Set the amount each page tile overlaps adjacent page tiles.
        - **Cut Marks**. Add guide marks to each page so that you can easily trim the overlapped area.
        - **Labels**. Add the filename and page number on each page tile.
        - **Tile only large pages**. Apply tiling to pages which are larger than the selected paper size at the specified scale. These pages are mapped to multiple sheets of paper.
        - **Remove margins**. Remove page margins.
    - **Multiple**: print two or more PDF pages onto a single sheet of paper. You can adjust settings like Pages per sheet, Page order and Print page border as needed.
        - **Pages Per Sheet**. Horizontally and vertically print a specified number of pages, or a custom number (up to 99). If you select a number from the drop-down menu, Right PDF will automatically select the best orientation for printing.
        - **Page Order**. Define the page order on paper. Horizontal arranges pages from left to right, top to bottom; Horizontal Reversed arranges pages from right to left, top to bottom; Vertical arranges pages top to bottom, left to right; Vertical Reversed arranges pages top to bottom, right to left.
        - **Print page border**. Print the crop box (the page boundary of PDF pages).
        - **Auto-rotate and center**. Automatically select the page orientation that best matches the content and paper, and also make the content center-aligned.
        - **Remove margins**. Remove page margins.
- **Booklet**: print multiple pages onto a single piece of paper following the reading order of a folded booklet. The printer must support automatic or manual duplex printing.

- **Booklet subset**. Choose **Front side only** or **Back side only** to print the document on the front or back side of the paper. Choose **Both sides** to print both sides of the paper.

  Note: if your printer doesn't support automatic duplex printing, you need to manually turn or flip the pages and put them back in. Select **Front side only** to print the page on the front side of the paper, after flip the pages and select **Back side only** afterwards.

- **Sheets**. Specify the first and last sheet to prin
- **Binding**. Decide the orientation for the binding, which has two options: left and right. For left-to-right reading, choose Left; for paper folded on the long side (the printable area is long and narrow), choose Left (Tall). For right-to-left reading or for Asian-style vertical reading, choose Right; for paper folded on the long side, choose Right (Tall).

- **Orientation**. Determine the orientation for printing.
- **Print as image**. Print a PDF file as an image. If normal printing does not produce the expected result, you can select **Print as image** and choose a DPI value from the drop-down menu.
- **Print to file**. Create a device-dependent PostScript file of a document. The result file contains code for enabling and controlling specific device features, making it incompatible with devices other than the target device.

Chapter 11: Multimedia

Multimedia

You can add movie and sound file to the document using the ***Multimedia*** tools in Advanced tab.

Multimedia preferences

1. Do any of the following to open the *Preferences* dialog box:
    - Choose **Right PDF > Preferences**.
    - Press **Command + K** on your keyboard.
2. In the **Preferences** dialog box, choose **Movie > Multimedia** and select the options as needed:
    - **Preferred Media Player.** Select the preferred application to play media content.
    - **Accessibility Options.** Determine whether to show supplemental text captions and audio description, and/or play dubbed audio when available.
    - **Remove All Trusted Documents.** Remove the documents currently on the *Trusted Documents.* When a movie within PDF is played, a dialog box will appear and ask you to either play only the movie or add it to Trusted Documents. If you select the latter, you will not see the dialog box when you play movies in that document next time.

Play multimedia

If a PDF contains multimedia files, they often come with play areas that can be activated. Play area usually appears as an image or blank field. To play multimedia files, please make sure you have installed supporting applications.

- Using the Hand tool or the Select tool, click the play area of the movie or sound

Note: when you first play a multimedia file within PDF, a dialog box will appear and ask you to either play it straightaway or add it to Trusted Documents. If you select the latter, you will not see the dialog box when you play multimedia files in that document next time.

Add multimedia to PDFs

Using *Movie/ Sound* tools, you can add movie clips or audio files to the document and make it easy for audience to understand your ideas. For unsupported file formats, you need to install appropriate applications, such as QuickTime, to play the multimedia.

Add a video or a sound file to a page

1. Open a PDF file and choose **Advanced > Movie** or **Sound** .
2. After you see the cross-hair pointer on the page, drag or double-click to select the area where you want the video clip or the audio file to appear.
3. In the **Add Sound/ Add Movie** dialog box, select the options to configure content and cover settings and then click **OK**:

    - **Content Settings**
        - **Media Compatibility**. Make the multimedia file compatible with a PDF version. For example, if you choose **PDF 1.5 and later**, only applications supporting version 1.5 or later can play the multimedia files. Then add a URL in the **Location** field or click the **Browse…** button to find the media file.
        - **Location**. Add a URL or click **Browse** to add a multimedia file. Please enter the complete URL which also includes the extension.
        - **Content Type**. The type of the multimedia file added. If you have chosen a multimedia file in Location, file type will be acquired automatically. But if you use a URL in Location, you need to specify yourself.
        - **Embed content in document. On by default.** Directly embed the file to play into the page.
        - **Snap to content proportions.** Ensure that the play area retains the height and width ratios of the original video or interactive content.

- **Cover Settings**
  - Specify the type of cover as the appearance of the multimedia files. You can create a cover from movie or from file. Click **Browse…** to select the file.

Edit the play area

You can use the Movie tool, Sound tool or Select tool to move, delete, or resize the multimedia files. Move the cursor over the play area to show the handles on the borders of the play area, even if you have made the borders invisible.

1. Open a PDF file containing multimedia files, and select **Movie/ Sound/Select tool.**
2. Using the Movie, Sound or Select tool, select the play area .Hover over the play area to show the red handles on the borders of it.
3. Click the play area and then do an appropriate action as needed:
   - **Move**. Click-drag the clip to move its icon to a new location on the page.
   - **Delete**. Right-click the play area and select Edit > Delete, or press **Delete on the keyboard**.
   - **Resize**. Drag one of the corners of the frame till it is the desired size. You can hold down **Shift** to retain the correct proportions for video clip.

Set multimedia properties

After a multimedia file is added to the PDF, you can edit its properties in the Multimedia Properties dialog box which offers the options such as adding specific actions or adjusting the appearance of the file. Properties will change based on the Media Compatibility (Multimedia,) you specified when adding multimedia file.

Set properties for rich media

1. Follow either way to open Rich Media Properties dialog box:
   1. Double-click the play area of multimedia with Select tool.

    2. Right-click a multimedia and select Properties… from the menu with Select tool.
2. Do the following in the dialog box:
    1. **Settings.** Enter the title and description for the movie or sound.
    2. **Appearance.** Specify the appearance of the play area, like border and cover.
3. Click **Close**.

Set properties for PDF 1.5 and later compatible files

1. Do either of the following to open the **Multimedia Properties** dialog box:
    - Double-click the play area of the multimedia file with the Select tool.
    - Right-click the play area of the multimedia file and select **Properties…** from the menu with the Select tool.

2. The *Multimedia Properties* dialog box contains the following options:
    - **Settings**. Type the title and description of the file. To add alternate renditions, click **Add…** and specify the file source for the rendition. To change rendition settings such as volume level and showing player controls, select the media rendition clip and click **Edit…**. Click **OK** to return to the Multimedia Properties dialog box. See Create alternate renditions for more information.
    - **Actions**. Define how to initiate media actions and determine new actions for the various mouse movements. In **Select Action**, specify the action the media file takes when the user fulfills the trigger. The **Do Action** setting box displays the list of triggers and actions you defined for the media file.
    - **Appearance**. Determine the border appearance of the play area and the cover settings.

3. Click **Close**.

Set properties for PDF 1.4 and earlier compatible files

1. Do either of the following to open the **Multimedia Properties** dialog box:
    - Double-click the play area of the multimedia file with the Select tool.

- Right-click the play area of the multimedia file and select **Properties…** from the menu with the Select tool.

2. The *Multimedia Properties* dialog box contains the following tabs and options:
   - **General**. Type a name in the **Title** box. To specify a different media file in a local drive, select **Local File** and click **Select…**. To specify a different media file located on the Internet, select **URL** and then type the web address in the field.
   - **Playback**. Select the following options on the Playback tab:
     - **Show player controls.** Display a controller bar at the bottom of the play area for users to stop, pause or play.
     - **Use floating window.** Play the clip in a separate window. You can specify the dimension of the floating window in the **Size** menu.
     - **Play.** Specify the play action of the media clip.
   - **Appearance**. Specify the appearance of the border and cover for the play area.
3. Click **Close**.

Rendition

Add rendition

In the Rendition list of Multimedia Properties, with Media Compatibility at PDF 1.5, added video clip is the first and the only rendition. You can replace rendition or add other renditions, so that users can play videoes in their own system. For example, you can add a HD video and a low quality video, and specify the system requirements for playing respectively.

1. Do either of the following to open the **Multimedia Properties** dialog box:
   - Double-click the play area of the multimedia file with the Select tool.
   - Right-click the play area of the multimedia file and select **Properties…** from the menu with the Select tool.
2. On the Settings tab, click **Add…**, and choose one of the following options from the menu. Click OK:
   - **Using a File...**. Select a file you want to add to the rendition list and click Open. In the Add a New File as Rendition dialog box, the content type is selected automatically.

- **Using a URL…**. In the Add a New URL as Rendition dialog box, type in the URL that links to the rendition and choose a content type.
- **Copying an Existing Rendition…**. In the Copy Rendition dialog box, select the rendition you want to copy.

3. Select the rendition and click **Edit…**. In the Rendition Settings dialog box, configure the playback settings to differentiate it from other renditions.
4. Add and edit as many renditions as needed.
5. When you finish adding and editing renditions, click **Close**.

Media Settings

This tab has options for adjusting the general properties of the video:

- **Rendition Name.** Type in the name for the rendition, which will appear in the list of renditions.
- **Description**. Type in the description of the rendition.
- **Media Clip Location.** Type in or click Browse… to navigate to the clip.
- **Content Type.** When you specify the clip location, Right PDF will automatically detect and choose a type. Once you specify the clip location, the content type will be set automatically. Please note that changing the content type settings may cause problems playing the media.
- **Allow Temp File.** Specify whether writing a temp file is allowed and when. Disallow the creation of temp files if you don't want users to copy the media content in a protected document. However, some media players write temp files while playing a video clip, and disallowing it may therefore prevent the video from being played by media players that require the use of temp files.

Playback Settings: This tab sets how to play clips.

- **Keep player open.** Decide whether you want the player to be left open forever or for the number of seconds you specify, or close once it plays the video clip to the end.
- **Volume**. Specify how loud the video is played.

- **Show player controls**. Display a controller bar at the bottom of the play area which lets users stop, pause and play. The bar will not appear if **Hidden** is selected at Playback Location on the Playback Location tab.
- **Repeat**. Play the clip continuously, or twice or more times.
- **Player List.** Click **Add…** to add a player to the list. Select the player and click **Edit …** to open Player Settings. Select the name of the player from the **Name** menu and determine **the minimum version** number of the player. Then specify the **Status** of the player Preferred, Required, or Disallowed. If there are more than one player that is set **Required**, only one of the required players can be used to play the rendition. Note that players set **Preferred** are selected over non-preferred players, and players set **Disallowed** will not be used to play the rendition.

Playback Location: Set whether to hide play area while playing the multimedia, and whether to show in full screen or floating window.

- **Playback Location Settings.**
  - **Playback Location.** Determine whether a video clip is played in a Floating Window, Full Screen, in the PDF, or remains hidden while played (recommended for sounds).
  - **Background Color.** Select the background color for the media player.
- **Floating Window Settings.** This section is available only when Floating Window is selected at Playback Location.
  - **Show title bar.** Select to show or hide title bar when playing the media in a floating window.
  - **Show control for closing window.** Select to show or hide the close button in the upper part in a floating window.
  - **Window Title.** Add a title for the multimedia.
  - **Resize.** Allow or forbid users to resize the floating window.
  - **Window Width/Height.** Specify the window width and height of the floating window. You can click the **Get From Media** button to get the dimensions of the video clip (if available) and edit it as needed.
  - **Window Position.** The window position is determined relative to Document window, Application window, Virtual desktop (for dual-monitor configuration) or Document monitor.

- **If Window is Offscreen.** Select whether to play, or move window onto screen to play the media file if the floating window is off-screen.

System Requirements: Use this tab to specify the minimum system requirements.

Under **Client system Requirements**, you can demand that a user must have at least 512 kbps download speed, and 1152-by-864 screen resolution to play the video clip. For Show subtitles, Play dubbed audio, Show audio/video description and Show supplemental text captions, you can choose Either, Disabled, or Enabled. If you select **Either**, you refer to the settings in the user's Multimedia panel of the Preferences dialog box. If you select either **Disabled** or **Enabled**, the corresponding settings in the Preferences > Multimedia must allow the rendition to be used. For example, if the **Show supplemental text captions** is Enabled, **the Show supplemental text captions when available** preference option must be selected as well to make the rendition work.

Playback Requirements: Settings from other tabs are listed on this tab where you can indicate which ones are required for the rendition to be played. For example, if the volume is set to 70% of the volume of the content in the Playback Settings tab, and you check the box next to Volume, the rendition will not be played unless this volume level can be used.

Chapter 12: Searching and indexing

Searching PDFs

Searching PDFs

Right PDF provides a powerful search engine that helps you run fast and effective searches. You can search the currently open document, documents in an external folder, Portfolio documents and any location on your hard drive. There are two ways to look for the text you want: **Find** is for running a quick and simple search, while **Search** for locating specific words, phrases, contents of multiple PDFs, files in a folder, or indexes. You may also freely move the Find or Search window on the screen by click-drag action.

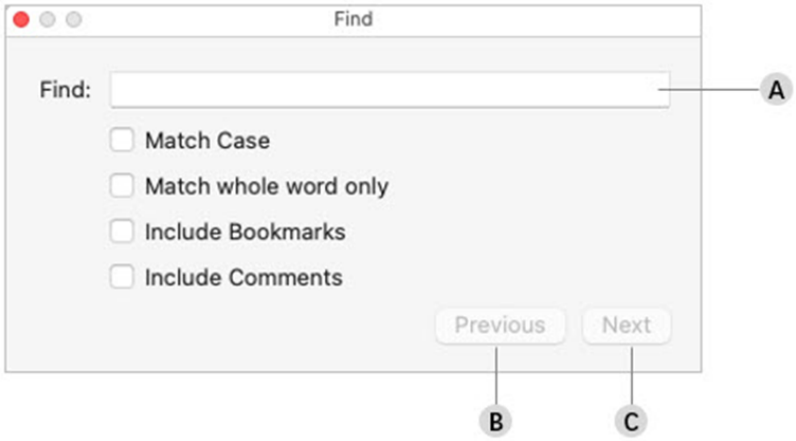
To speed up searching large numbers of related PDF documents, define a catalog of PDFs to create a full-text index and then choose to search the PDF index instead of the documents themselves.

Find text in PDFs

Find text in the currently open PDF

The Find feature searches the currently open PDF document and enables searching bookmarks labels and comment text.

1. Open a PDF file and do either of the following to call out the Find window:
    - Choose **Basic > Find**.
    - On Menu Bar, Choose **Edit > Find**.
    - Press **Command + F** on your keyboard.



The Find window: A. Find field B. Find Previous C. Find Next

2. In the **Find** window, enter the text you would like to search for in the Find box.
3. Select the options listed below if needed:
    - **Match whole word only. I**t finds only the instances that match the complete word you type in the text box. For example, if you search for background, the word backgrounds will not be included in the results.
    - **Include Bookmarks.** Select to allow searching the text in the Bookmark panel and also the document.
    - **Include Comments.** Select to allow searching the text of any comments and also the document. If you would like to search comments only, open the Comments panel and click the **Search comments** button. Type in the text you want to search for and click **Search Comments**.
4. Press **Return** on your keyboard to go to the first instance of the search term.
5. Press **Return** again to jump to the next instance. You can use the Previous and Next buttons to go back to the previous instance or the next instance at will.

Find text in multiple PDFs

You can look for search terms across multiple PDF documents in the Search window. The search engine can let you search the current document, across all PDFs in a specified folder, or all files in an open PDF Portfolio.

1. Open a PDF file and do either of the following to call out the Search window:

- Choose **Basic > Search**.
- On Menu Bar, choose **Edit > Search**.
- Press **Command + Shift + F** on your keyboard.

2. In the Search window, select the following options:
    - **Look in**: restrict the search to the current PDF document, selected Portfolio documents, the entire PDF Portfolio, an index, or a location on your computer. If you choose to search an external folder or indexes, click on Advanced and specify the Additional Criteria that follows.
        - If you choose to search **External Folder**, specify a folder to look into from the Specify a folder drop-down menu.
        - If you choose to search **Currently Selected Indexes**, you must have selected indexes files in Index Manager. Otherwise, you have to select **Select Index.**.. to add Index files ([index title_index]).
    - **What word or phrase would you like to search for?.** You can narrow down search results by choosing the options below:
        1. **Single word or phrase.** Enter the word or phrase you would like to search for and define its searching options:
            - **Match Case.** It searches for the entire string of characters that matches the capitalization you type in the text box. For example, if you search for Each of, only Each of will be included in the results and Each Of or Each OF are not included in the results.
            - **Match whole word only.** It searches for the entire string of characters, including spaces, in the same order in which they appear in the text box. For example, if you search for Each of, then Each Of, Each OF, and Each of are included in the results. You can check this option to filter out other words that contain the letter combination of the word you specify in the text box. For example, if you are searching for all and would like to filter out other words like small or usually, check this option to refine the results.
            - **Include Comments.** It also searches the text of any comments added to the PDF.
            - **Include Bookmarks.** It also searches the text of any bookmarks.
            - **Include Subfolders.** It also searches subfolders of the specified folder or computer disk. This option is available only when you look in a specified folder.

- **Stemming.** Find words that contain part (the stem) of the keyword. For example, a search for control will find instances of controlling, controls, and controlled.

2. **Multiple words or phrase.** You can search for more than one words or phrases. Click **Select Words**... and add new words or phrases. In the **Words and Phrases to Search** dialog box, type the word or phrase to search for in the **New word or phrase** field and click **Add** to add it to the **Word and phrase list** box below. You can repeat the steps to add more. At the bottom there are checkboxes which serves to refine your search results. Click **OK** to finish.
3. **Patterns.** Select a type of information you would like to search for from the drop-down menu. Click **Search**.
4. **Arbitrary mask.** It changes the format category to custom and makes another text field available, in which you can type a custom format. Use this option to specify which types of characters the user can enter in any given position, and how the data displays in the field.
    - **A** accepts only letters (A-Z. a-z).
    - **X** accepts spaces and most printable characters, including all characters available on a standard keyboard and ANSI characters in the ranges of 32-126 and 128-255.
    - **O**. The letter "O" accepts alphanumeric characters (A-Z. a-z, and 0-9)
    - **9** accepts only numeric characters (0-9).

      For example, a mask setting of AAA--p#999 accepts the input BOE--p#767.

3. Click **Search** to display a list of results in page order.

Review PDF search results

You will have a list of results displaying any instance that matches the search criteria you set. The results are listed in page order with the search term highlighted in blue. The total number of words found appears at the bottom-right corner.

View a specific instance in the search results

You can directly view an instance in the PDF by clicking it in the search results.

1. The search results appear after you run a search in the Search window. Click an instance in the list of results and jump to the place in the PDF document where the instance appears.
2. You can then click another instance in the results to view it in the PDF document.

Save search results to PDF/CSV

Follow the steps below to save search results as a PDF or CSV file:

1. In Search dialog box, click the Save results to … button to show menu. Choose Save results to PDF or Save results to CSV.
2. In the Save dialog box, enter the filename and specify a save location.
3. Click Save and a Progress box will appear. The result file will be automatically opened when finished.

Search index files of cataloged PDFs

Search index files of cataloged PDFs

You can speed up the search by searching the index of a catalog of PDFs rather than running a full-text search of each individual PDF document in the catalog.

1. Open a PDF file and choose Basic > Search, or press Command + Shift + F on your keyboard.
2. In the Search window, select Select Index... from the Look In drop-down menu.
3. In the Index Manager dialog box, select an index from the list, or click Add and select an index folder (default name is [index title_index]).
4. Click OK to return to Look In dialog box. The path of the selected index is displayed in the setting box beneath the Look In field in which Currently Selected Indexes is automatically chosen.

5. Enter in words you search for and proceed with your search as usual.
6. Click >>Advanced to adjust advanced search options and then click Search.

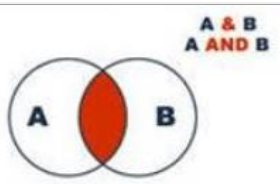
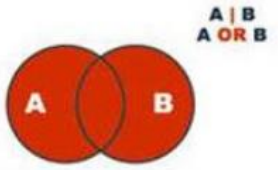
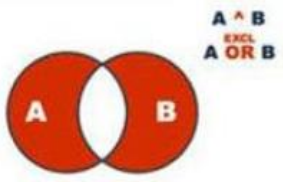
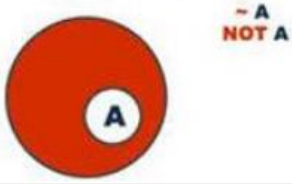
Advanced search options

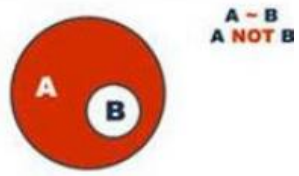
- Match
  - **Match exact word or phrase**. It searches for the entire string of characters, including spaces, in the same order in which they appear in the text box.
  - **Match any of the words**. It searches for any instances that contain at least one of the words typed. For example, if you search for at all, the words at, all, at all, and all at, are included in the results.
  - **Match all of the words**. It searches for any instances that contain all the words you type but not necessarily in the order you type.
  - **Boolean query**. It searches using the Boolean operators that you type with the search word into the What word or phrase would you like to search for text field. For more information, see Boolean operators.
- **Additional Criteria.** You can restrict results to certain keys by setting additional criteria for searching multiple documents. Additional criteria appear only when you search multiple PDF files or indexes.
  - **Key**. Select a field type to be a criterion. Click [New Criteria] to show the down-pointing arrow next to it and then select a field type from the drop-down menu. Repeat the steps to add more if needed.
  - **Operation.** Select an operation for the key you selected. If Modified/Created Date option is selected for Key, then the available options will be "Is Before", "Equal To", "Not Equal To", and "Is After". Otherwise, they are "Includes" and "Excludes".
  - **Value**. Click inside the field and then enter a value. If you select either Modified Date or Created Date for Key, choose a date from the expanded calendar by either entering a date or choosing a date via up/down arrow keys.

Boolean operators

Use the following Boolean operators to either narrow or broaden your set of results.

- **AND**: Use AND between two words to find documents that contain both terms. For example, type New York AND Philadelphia. All documents that contain both words will be found.
- **NOT**: Use NOT before a search term to exclude any documents that contain that term. For example, type NOT New York. All documents that do not contain the word New York will be found. Or, type New York NOT Philadelphia to find all documents that contain the word New York but not the word Philadelphia.
- **OR**: Use OR to search for all instances of either term you enter. For example, type beside OR besides to fine all documents with occurrences of either word.
- **^**: Use ^ (exclusive OR) to search for all instances that contain either term, but not both. For example, type day ^ night and all documents that contain either day or night will be found but not both day and night.
- **( )**: Use ( ) to specify the order of evaluation of terms. For example, type yellow & (beans | tails) and all documents containing either yellow and beans or yellow and tails will be found. The query processor performs an OR query on beans and tails, and then performs an AND query on those results with yellow.

Operator	Symbol	Examples	Diagram
AND	&	A & B A AND B	
OR	|	A | B A OR B	
EXCLUSIVE OR	^	A ^ B A EXCLUSIVE OR B	
NOT (Single)	~	~ A NOT A	

NOT (Multiple)	~	A ~ B A NOT B	

Note: you can refer to web sources for more information on Boolean queries, syntax and other operators you can use in you searches.

Indexing PDFs

Create and manage an index in PDF

You can create an Index that consists of a catalog of PDF documents to speed up searching across a large volume of documents. It's faster and more efficient to search the index than to search the document. Before indexing PDF documents, you have to collect all PDF documents to be indexed into one or more folders. Make sure that the existing folder you choose contains only the PDF files to be indexed. The way you search documents without embedded indexes is exactly the same as how your search those with indexes.

Add an index to a PDF

1. Open a PDF file in Right PDF.
2. Choose **Basic > Index**, and then select **Embedded Index**... from the menu.
3. In the **Embedded Index** dialog box, click **Create** to add an index to the PDF document that currently has no embedded index. Read the message that follows and click **OK**.

Update or remove the embedded index in a PDF

1. Open a PDF file in Right PDF.
2. Choose **Basic > Index** and then select **Embedded Index**... from the menu.
3. In the Embedded Index dialog box, do an appropriate action as needed and then click **OK**.

    - **Delete.** Click **Delete** to delete current index in the PDF.
    - **Update.** If the PDF file has been modified, click **Update** will result in updating the index.

Create a full text index for multiple PDF documents

Using Create Full Text Indexes, you can create an index that contains a catalog of PDF documents. An index is especially useful when you want to search cataloged PDF documents for certain information. The search engine searches the selected index rather than the documents themselves, making the search process much faster.

To create an index

When you create a new index, an index folder ([index title_index]) is created along with a support index file (*.zpi) and one or more index content files.

1. Open a PDF file and choose **Basic > Index**. Click the down-pointing arrow to the right of Index and select **Create Full Text indexes...** from the menu.
2. In the **Catalog** dialog box, type a name for the new index.
3. In **Description**, enter a few words to describe the purposes or the type of the index.
4. In **Stop Words**, enter words you want to ignore during the index search process and click **Add**. Repeat it to add more words. To remove an item from the list, click to highlight one and click **Del**.
5. In **Custom Field**, type a field name, select a type for the index and then click **Add**.
6. Under **Include Directory**, click **Add** and locate a folder containing some or all of the PDF files to be indexed and then click **Choose**. Repeat this step to add more folders. To remove a folder from the list, select one and click **Del**.
7. Under **Exclude Directory**, click **Add** and select any nested folder that contains PDF files you do not want to be indexed and then click **Choose**. Repeat this step to add more folders. To remove a folder from the list, select one and click **Del**.
8. Click **Build**, give the ([index title_index]) file a name, and specify a location for it. Click **Choose**.
    - The **Building** dialog box shows the progress of indexing. You can click **Stop** to cancel the indexing process or click **Close** when the indexing process finishes.
    - Note that if canceling the indexing, you cannot resume the same indexing session anymore but you don't have to redo the work. All the settings and folders chosen remain intact. You can simply click **Open**, select the partially finished index and revise it.

To revise an index

You can rebuild, purge an existing index folder, or create a new index with the existing information.

1. Open a PDF file and choose **Basic > Index**. Click the down-pointing arrow to the right of Index and select **Create Full Text indexes...** from the menu.
2. In the **Catalog** dialog box, click the **Open** button located next to the **File** field. Locate and select an existing Index File ([index title_index]) and then click **Choose**.
3. Make changes to the selected index as needed. Click **Close**:
    - **Build.** Create a new index file with the existing information, and update it by adding new entries and marking changed entries as invalid. If you make a large number of changes or use this option repeatedly instead of creating a new index, the time needed for searching may increase.
    - **Rebuild.** Create a new index by overwriting the existing index folder and its contents.
    - **Purge.** Delete the index contents (all files except for .zpi index files in the index folder) without deleting the index file ([index title_index]) itself.