



# PDF CONVERTER Professional 7

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## Quick Reference Guide



NUANCE®

This Guide shows screen pictures made with Windows® XP. The appearance may vary under other Operating Systems.



## Why are PDF files popular?

The Portable Document Format has become a de-facto standard for document exchange across platforms and computing environments. More than 200 million PDF documents are posted on the World Wide Web. Key benefits that have driven this popularity are:

- **Integrity:** PDF files look like the original documents they were created from. They conserve their appearance after sharing - regardless of platform, operating system, installed fonts or local settings on each computer or device.
- **File size:** In many cases, PDF files can be more compact than their source documents - ideal for file transfer.
- **Security:** PDF files can be digitally signed and password protected to prevent unauthorized changes.
- **Sharing:** While the basic document content can be frozen, commenting and mark-up tools allow collective authoring and document review.

## What PDF Professional does for you

Nuance® PDF Converter Professional 7 from Nuance Communications Inc., offers the full circle of functionality for handling PDF files. It can unlock and open PDF files up to version 1.7 for viewing, editing, annotation and re-assembly. It can create PDF files from versions 1.3 to 1.7 (PDF/A format is also supported). It can unlock PDF files for repurposing in other applications.



This professional product has three parts for creating, editing and unlocking PDF files. These are all installed and activated with a single procedure.

## Create PDF Files



Nuance® PDF Create 7 lets you create PDF files from a wide range of file types. The Print dialog box in your print-capable applications will offer a printer named **ScanSoft PDF Create!** The PDF Create Assistant lets you compile a list of files generated by different applications. You can also create PDFs from XPS files. Each file can be converted to a separate PDF file, or they can be combined, overlaid or packaged into a single file. When working in Microsoft® Word™, Excel®, or PowerPoint you can call on the program to create a PDF file directly from your current document. During conversions hyperlinks and comments can be transferred and you can set bookmarks to be generated from the structure of the Word document, each worksheet in Excel or for each slide in a PowerPoint presentation. Document information (metadata) can also be transferred. When working in Microsoft Outlook® or Lotus Notes®, message attachments can be saved as PDF files. As you write a new message or a reply, you can choose a non-PDF file from your computer to have it converted to PDF and attached.

The program can create PDF files in versions 1.3 to 1.7 and PDF/A. Files can be protected by passwords and can include watermarks. Compression and font settings give you control over PDF file size and appearance.

## Edit PDF Files



Nuance PDF Converter Professional gives you extensive control over your PDF files through an easy-to-use browsing and reading interface. You can edit pages and documents, annotate and review them, adjust document security, sign your documents and more. PDF documents can be compiled from different sources and pages can be rearranged. The program delivers a powerful document management system: use it to create archives from related documents to index and search them later. Alternatively, in the Enterprise edition, you can access different document management systems through the application: use them to store or archive your PDF documents.

## Export PDF Files



Nuance® PDF Converter 7 lets you unlock PDF and XPS files to edit them as Microsoft® Word™, Microsoft® Excel®, Microsoft® PowerPoint®, Corel® WordPerfect™, and generic RTF files. It also lets you open PDF or XPS files directly from these and other applications, edit them and save them in the appropriate file type. It converts PDF files up to and including version 1.7. Encrypted PDF files can be opened if the required password is provided.

## Installation and Activation

PDF Converter Professional 7 detects previous versions and components and prompts for your confirmation to remove them. You should have administrator rights on the computer to install and activate the program. You need web access for activation.

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

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

(If you have downloaded the program from the Nuance web site, double-click its autorun.exe file.)

### 2. License and Serial Number

You must accept the license agreement in order to proceed. You must enter a serial number. You will find this on the CD sleeve or on the Nuance web site, or a reseller's site at the download location.

Some resellers let you see the serial number at a later time, by returning to your purchase order. Be sure to keep the serial number in a safe place; it is fully checked only during product activation and is also needed for any re-installations.

Serial numbers never include the letter "O", always use zero.

### 3. Location and Setup Type

The installer offers a default location for the program. Accept it or define a different one. Select Complete or Custom Setup. Choose Custom to accept or decline installation of the PDF unlocking component. Choose Custom also to enable or disable the integration of PDF Converter and PDF Create in other programs. By default, all the programs offered in the PDF Converter Professional Integration panels of the InstallShield Wizard will be enabled. (You can change integration settings later by choosing the program under Add or Remove Programs in the Control Panel and clicking Change and then Repair.)

### 4. Click Finish

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

### 5. Activate

You will be invited to activate the product at the end of installation. Please ensure that web access is available. Provided your serial number is found at its storage location and has been correctly entered, no user interaction is required and no personal information is transmitted. If you do not activate the product at installation time, you will be invited to do this each time you invoke the program. PDF Converter Professional creates PDF files with a trial watermark on each page if you use it without activation. *If you ignore the first five activation prompts, you must activate products separately and manually - a much more time-consuming process.*

You will be allowed to re-install the program a reasonable number of times without having re-activation problems, because un-installation includes a de-activation step. The serial number is needed for re-installation and web access is needed for de-activation and re-activation.

For registration and activation troubleshooting see the Nuance Knowledge Base at <http://knowledgebase.nuance.com/>.

**Note:** Keep the serial number of earlier versions, to retain the option of installing them on a different computer.

## How to Get Help

This guide is available in a PDF file on the CD and after installation in the program folder. It can also be accessed from the About panel. When the program is delivered electronically, this PDF is available at the download site and is included in the download.

Nuance PDF Converter Professional has a comprehensive HTML Help system. Use the Help Menu to open it at its Introduction.



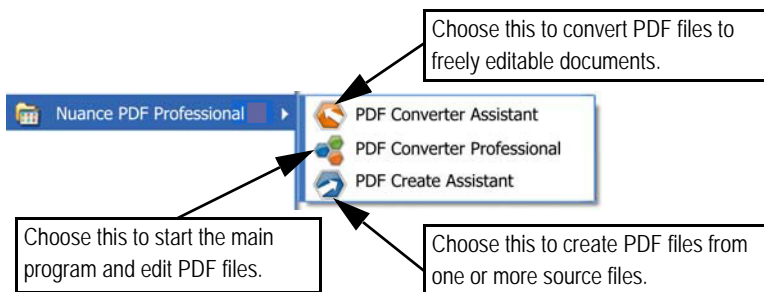
Press F1 to open Help: typically at the topic describing the currently open panel. Some dialog boxes have Help buttons.

A Release Notes file with latest information is available on the CD and in the program folder. The Nuance web site offers program information, with a regularly updated knowledge base and user forums.

**Note:** System requirements are presented on the product box and in Help.

## Starting the Program

Choose Nuance PDF Professional 7 from the Windows Start Menu. This offers the following items:





# Create PDF Files

## Overview of creating PDF files


PDF Creation can be done from the following locations as described in the table and the following sections:

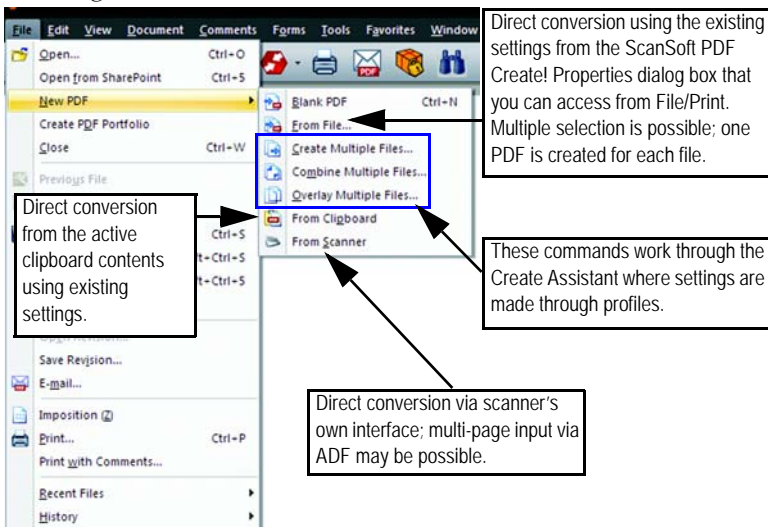
Location	Source files	Conversion method	Target
PDF Professional File menu or File toolbar	One or more local or DMS files, scanner or clipboard	Direct conversion from clipboard, scanner or files. Create Assistant to create, combine or overlay files.	PDF Professional as current PDF document
Print dialog boxes	Current document in the calling application	Individual settings. A page range can typically be specified	Pre-defined or via Save As
Windows Start Menu (plus optionally desktop, quick load bar and system tray)	One or more local or DMS files	Create Assistant, using profiles; page ranges are not supported	User defined. To local file, to e-mail or both
Windows Explorer shortcut menu	One or more whole local files	Direct conversion using a chosen profile and assembly instruction	Pre-defined or via Save As to local file, to e-mail or both
Microsoft Word (Create PDF button)	Whole current Word file	Direct conversion with current settings. Word and general settings can be accessed from Word	Via Save As to local file, to e-mail or both
Microsoft Excel (Create PDF button)	Current Excel workbook or worksheet	Direct conversion with current settings (can be accessed from Excel)	Via Save As to local file, to e-mail or both
Microsoft PowerPoint 2007(Create PDF button)	Whole current presentation	Direct conversion with current settings (can be accessed from PowerPoint)	Via Save As to local file, to e-mail or both
Microsoft Outlook and Lotus Notes (out)	One or more attachments to a mail message	Direct conversion of all attachments or with a selection box. Settings can be accessed	Pre-defined or via Save As to a local file



Location	Source files	Conversion method	Target
Microsoft Outlook and Lotus Notes (in)	One or more files on the local computer	Direct conversion using current settings (no access to settings)	PDF attached to current message
Microsoft Internet Explorer	Current web page or a link to another page	Direct conversion with current settings. Settings can be accessed from Explorer	Via Save As to local file, to e-mail or both

## Create PDFs from PDF Professional

Click the New PDF button  in the Main toolbar of PDF Professional, or select New PDF from the File menu. See the picture below. You can create a blank PDF or choose From File... to select one or more files from an Open dialog box, even if they were created in different applications. The next three commands lead to the PDF Create Assistant giving you full control over the creation process. You can also drag-and-drop files created in a print-capable application onto the PDF Converter Professional workspace. In this case the behavior is the same as when choosing From File...



The screenshot shows the File menu of PDF Professional. The 'New PDF' option is highlighted. Below it are 'Create PDF Portfolio' and 'Close'. A sub-menu is open for 'New PDF', showing options: 'Blank PDF' (Ctrl+N), 'From File...', 'Create Multiple Files...', 'Combine Multiple Files...', 'Overlay Multiple Files...', 'From Clipboard', and 'From Scanner'. Three callout boxes provide details:

- Top right callout:** Direct conversion using the existing settings from the ScanSoft PDF Create! Properties dialog box that you can access from File/Print. Multiple selection is possible; one PDF is created for each file.
- Bottom right callout:** These commands work through the Create Assistant where settings are made through profiles.
- Bottom callout:** Direct conversion via scanner's own interface; multi-page input via ADF may be possible.

There is also a separate callout box on the left side of the menu:

- Left callout:** Direct conversion from the active clipboard contents using existing settings.

## Create PDFs from Print dialogs

The Print dialog box appearing in your print-capable applications will include a PDF Create printer. Load a file you want to make a PDF from, then select File/Print. Select **ScanSoft PDF Create!** as the name of your printer. Specify a page range and other settings as desired. One PDF file is created; the number of copies value is ignored. Click Properties to check or change PDF Create settings. Click OK to start the creation. By default the Save As dialog appears, but you can give automated saving instructions under Properties/PDF Settings.

## Use the PDF Create Assistant

The Assistant is called from the Windows Start menu. It lets you compile a list of files to be converted. These files may have been created in different applications. Choose to combine the files in the given order to create a single PDF file or have each file converted separately. You can package a set of files into a single PDF. Files can also be overlaid for the conversion. The Assistant lets you use profiles to control the PDF creation. Profiles contain a group of settings designed for a particular outcome. The program includes seven profiles; you can create more for your own needs. Help explains how to do this.



The screenshot shows the Nuance PDF Create Assistant window. At the top, there are three callout boxes: "Remove selected files from the list" pointing to the Delete button, "Move selected files up or down" pointing to the Up and Down buttons, and "Remove all files from the list" pointing to the Clear button. Below these is a table of files with columns for file name, size, and date modified. A callout box "Drag and drop input files onto this area, or use the Add button" points to the file list area. Below the table, there are several settings sections. A callout "Supported File Types" points to the "Supported File Types" link. Another callout "Assembly instruction\*" points to the dropdown menu currently set to "Create a PDF for each input document". Below this, there are dropdowns for "Standard Quality" and "Send results as e-mail attachment only; E-mail; If file exists: Query; View Resulting PDF;". A callout "Select a profile" points to the "Standard Quality" dropdown. Below these are checkboxes for "Always on Top" and a gear icon. A callout "Click to start PDF creation" points to the gear icon. To the right, there are buttons for "Options...", "Profiles...", and "Saving...". Callouts "Click to change saving settings" and "Change profile settings" point to the "Saving..." and "Profiles..." buttons respectively.

**Nuance PDF Create Assistant**

Buttons: Add, Delete, Up, Down, Clear

	Size	Date Modified
Open file... Open from DMS...		
Sample.xps	19.50 KB	10/9/2007 11:38 AM
Screenshot.bmp	53.79 KB	10/24/2007 14:39 PM
My WorkBook.xls	178.15 KB	10/24/2007 14:28 PM
	11.50 KB	10/24/2007 14:38 PM

Supported File Types **Assembly instruction\*** Help Upgrade

Create a PDF for each input document Options...

Standard Quality Profiles...

Send results as e-mail attachment only; E-mail; If file exists: Query; View Resulting PDF; Saving...

Always on Top

Callouts:

- Remove selected files from the list
- Move selected files up or down
- Remove all files from the list
- Drag and drop input files onto this area, or use the Add button
- Supported File Types
- Assembly instruction\*
- Select a profile
- Click to start PDF creation
- Click to change saving settings
- Change profile settings
- This displays current saving settings

\* other assembly instructions are:

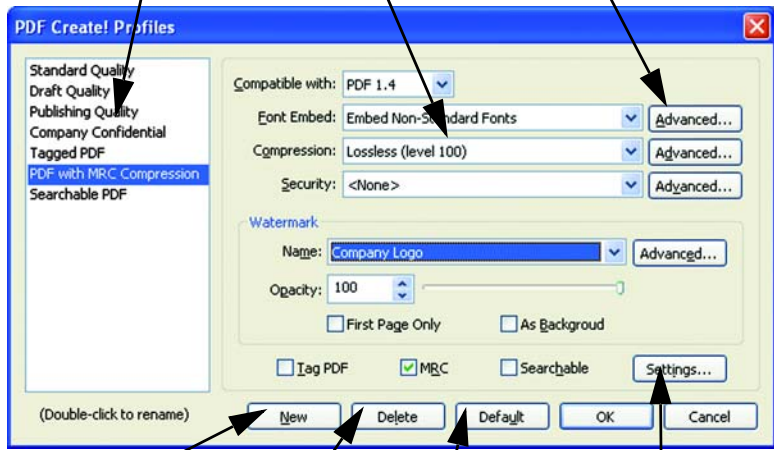
- Combine files into a single PDF (in listed order and ability to generate a bookmark for each input file)
- Overlay files (with overlay options)
- Package files as PDFs inside a container PDF (with options)

Click the Profiles... button to change settings for any profile, or to create a new profile based on an existing one.

1. Select a profile here

2. Make selections here

3. Specify settings for each selection here



The screenshot shows the 'PDF Create! Profiles' dialog box. On the left is a list of profiles: Standard Quality, Draft Quality, Publishing Quality, Company Confidential, Tagged PDF, PDF with MRC Compression (highlighted), and Searchable PDF. The main area contains settings for 'Compatible with' (PDF 1.4), 'Font Embed' (Embed Non-Standard Fonts), 'Compression' (Lossless (level 100)), and 'Security' (<None>). There is also a 'Watermark' section with 'Name' (Company Logo) and 'Opacity' (100). At the bottom are checkboxes for 'Tag PDF', 'MRC' (checked), and 'Searchable', along with a 'Settings...' button. At the very bottom are buttons for 'New', 'Delete', 'Default', 'OK', and 'Cancel'. A note '(Double-click to rename)' is next to the 'New' button.

Select a profile, click this to name a new profile based on it, then change settings and save it with OK.


Click this to delete the selected profile after a warning.

Click this to restore default settings for the selected profile.

Access settings for MRC compression and creating searchable PDF files.

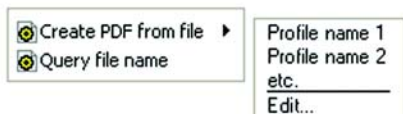
For information on making tagged or searchable PDF files, and the benefits of applying MRC compression, see Help.

Click OK to have the selected profile applied, with the settings you specified.

Then press the Create button  in the Assistant. The Print Info dialog box appears, listing the input and output files and showing the conversion status. Double-click any PDF name to view the created PDF.

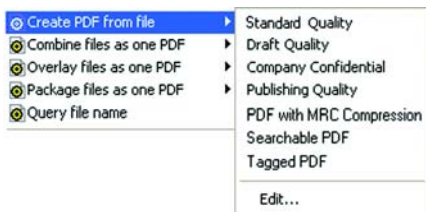
## Create PDFs from Windows Explorer

Right click on a single file. The shortcut menu includes:




Choose a profile from the first item's sub menu. The current settings for that profile will be used for the PDF creation. Click Edit... to modify profile settings or create a new one before PDF creation. The second item shows the current saving instruction. Click on it to set a different instruction.


If you select a group of files and right click, the shortcut menu includes:




Choose the first option and then a profile to create one PDF from each selected file. To generate a single PDF, choose to combine, overlay or package the files along with a profile. The last option displays the current saving instruction. Click it to change this.

## Create PDFs from Microsoft Word




1. Open the Word document.
2. Select Create PDF from the Nuance PDF menu or click . In Word 2007 or 2010 you can find this in the Nuance PDF tab.
3. Accept or change the default target folder and file name in the Save As dialog box that appears.

4. Optionally, add document information (keywords etc.) or choose **Embed Metadata** (see below).
5. Click  to create a PDF and attach a copy of it to an e-mail message.

## The Nuance PDF Settings for Word dialog box




This can be accessed from a toolbar button  or an item in the Nuance PDF menu. (In Word 2007 you can find this in the Nuance PDF tab.) It lets you define settings that are applicable only when creating a PDF from a Word document. Define which paragraph styles in the Word document should be converted to bookmarks in the PDF, which comments should be transferred, how hyperlinks should appear, and which items should be tagged, if any. Choose **Embed Metadata** to transfer document information (subject, author, keywords...) from the Word document into the PDF. Use the Advanced panel to access the full range of PDF creation settings.

## Create PDFs from Microsoft Excel and PowerPoint

1. Open the Excel file or PowerPoint presentation.
2. Select Create PDF from the Nuance PDF menu or click .
3. Accept or change the default target folder and file name in the Save As dialog box that appears.
4. To create a PDF and attach a copy of it to an e-mail, click .
5. To change creation properties, click .  
You can choose whether or not to have comments and hyperlinks transferred to the PDF and bookmarks created. In Excel each worksheet becomes a bookmark and in PowerPoint each slide. Choose **Embed Metadata** to transfer document information from the source document into the PDF.


## Create PDFs in mailing applications

A new toolbar is added to Microsoft Outlook and Lotus Notes (versions 7.0 and 8.5).

1. Click  to convert the attachments in the current message to PDF and save them to a defined folder.
2. Click  to access settings. Choose to have all attachments converted in the background and sent to the last used folder, or to be able to choose which attachments to convert and to change the target folder.
3. Click  in the Nuance toolbar in a new message or a reply window to choose one or more files from your computer to be converted to PDF and attached to the message.

NOTE: If you do not see the buttons  in Word, Excel or PowerPoint, go to View > Toolbars and select Nuance PDF.

## Create PDFs from Internet Explorer

1. Open a web page you want to capture as a PDF.
2. Click the Create PDF button  and choose to make a PDF from the web page, or to add its content to an existing PDF, or to create a PDF and attach it to a new empty message in your default e-mail program (Outlook or Lotus Notes).

The button's drop-down list also lets you access creation options. To make a PDF from a web page linked to the current one, right-click on the link and choose **Create PDF file from the content of the link**.

## ScanSoft PDF Create! Properties dialog box

This gives you full control over conversions done without using the PDF Create Assistant. In the General panel you define page size, orientation, resolution for the PDF, choose whether or not to view it after creation and choose a grayscale or color PDF. The PDF Settings panel lets you define the PDF version, control font embedding, set compression types and severity, define passwords and add watermarks. It gives you choices for naming the created PDF file(s) and defining properties such as title, author, subject and keywords. The created file(s) can also be directed as attachments to an E-mail message, ready for distribution.

The ScanSoft PDF Create! Properties dialog box can be accessed from the Print dialog box in your applications. When working from the Create Assistant or Windows Explorer, these settings are made through the profiles. If you need to access these settings from Microsoft Word, choose File/Print instead of the Create PDF button.

## How to overlay PDF files

Overlay options let you place artwork or other fixed items onto just the first page of your PDF files, together with items that change from file to file. Overlay example for a cover page:



Single-page file with repeated elements

+

Page 1 of a multi-page document

=

Cover page of resulting PDF file

To have this result, deselect the option 'Repeat the last page of the shortest document for page overlay'.

You can also use an overlay to add a company logo or other fixed item to every page of PDF files you create. To do this select the option named above. For more information on overlay choices, please consult Help.



## How to package files

A package is a single PDF file that contains a set of PDF files. Packages help you group related files, making it easier to send them by e-mail. To package a set of files, maybe of differing file types, select them in the PDF Create Assistant. Choose packaging as the assembly instruction. Click Options to choose which cover page to use: a Create Assistant Template or the first listed file.

Click the Create button  to have PDF files created or transmitted into the package.

To open a PDF package you must use a recent PDF viewer or editor, such as Nuance PDF Converter Professional 5 or 6. All files in the package are listed, you can open and save each one separately. With Nuance PDF Converter Professional 4 and older PDF viewers/editors, the files are indicated as attachments.

## SharePoint and other DMS support

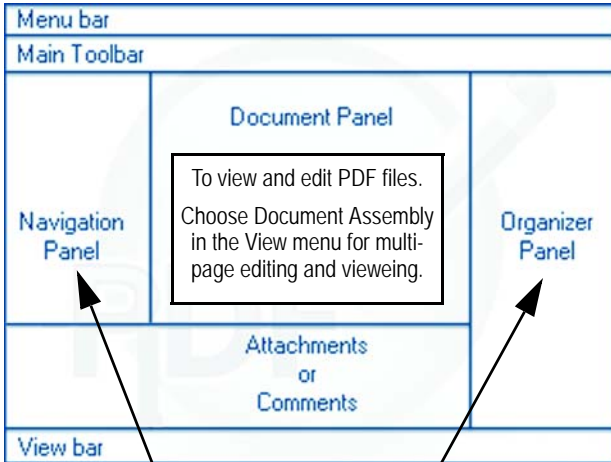
Microsoft SharePoint is supported by PDF Create inside PDF Converter Enterprise 7, through a set of dialog boxes that can be accessed from the Add button menu item Open from DMS. Other Document Management Systems (Hummingbird, Worksite, DocsOPEN, LiveLink) can be accessed directly through their own interfaces. See Help for detail, and System Requirements for the full DMS listing. Created PDF files can be stored in SharePoint or other systems by choosing Save to DMS as target in the Destination Settings dialog box.

Inside SharePoint, Hummingbird Enterprise and Interwoven Worksite it is possible to choose a non-PDF file, open its shortcut menu to call on PDF Create to make a PDF from it and place it in the same location, with the same file name. It is also possible to select a non-PDF file from the computer's file system and have it converted to PDF and placed in the DMS at the current or a defined location.



# Edit PDF Files

The main screen areas of PDF Converter Professional are as shown below:



## Navigation panels:

- Attachments
- Bookmarks
- Comments
- Destinations
- Form Controls
- Model tree
- Pages
- Signatures
- Tags



## Organizer panels:

- Clip Art
- Envelope
- Security
- Sign/Certify
- Stamps
- Watermarks



PDF Converter Professional groups its controls in several toolbars. You can undock these and drag them into your working area. Here we present the main toolbars, in some cases describing the individual tools from left to right. You can customize toolbars to show or hide buttons.

## File toolbar



Use the drop-down list of the PDF Converter tool to unlock the current PDF targeting a selected format and processing mode. For details see the **Export PDF Files** section later in this guide.

This toolbar presents basic operations, such as creating, opening, saving, printing, e-mailing, and searching PDF files; or adding them to your favorites. Scan buttons offer enhanced Scan-to-PDF functionality, including a Scan Inbox in PDF Converter Enterprise 7.

## Standard toolbar



**Hand:** Use this tool for PDF viewing and scrolling. Selection tools let you select pieces of text and document areas.

**Select text:** Select a text block for editing its properties, exporting, etc.

**Select image:** Select an image for editing its properties, exporting, etc.

**Select area:** Select an area for copying or converting its content to an editable format.

**Select object:** Use this to modify object properties and alignment.

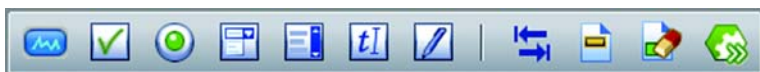
**Link:** Use this to define a rectangle that will become a hyperlink.

**Crop:** Draw a rectangle to define the area to remain after cropping; double-click in it to set cropping instructions.

**Touch-up text:** Make limited text edits, even over multiple lines of text.

**Touch-up object:** Select objects to move, resize, rotate, group or prioritize them. To modify tag data, select an object, right-click for a shortcut menu and choose Properties/Tag.

## Form Tools toolbar



Use this toolbar when working with forms. You can add the displayed form controls to a PDF form. Other tools enable you to highlight or reset form fields and set the tab order.

**FormTyper:** Use this (the last button on the right) to have form elements detected and automatically activated so you turn a static PDF into a fillable form.

## Comments toolbar



**Note:** Add a note to the PDF; note conversations are possible when PDF files are shared. Sort notes by author, type, date and more.

**Text Box:** Click this to add a text box above the other content on the PDF page.

**Callout:** Add customizable callouts to your document.

**Text Markup:** Use different markup tools on the selected text.

**Highlight:** Select from the shown highlighting tools.

**Attach:** Attach a file or a sound file to the PDF with an icon at a specified location.

**Drawing:** Draw different shapes on the page. Use a shortcut menu to signal 'complete' when drawing multi-sided shapes.

## Security toolbar



**Security panel:** Click this to set passwords and other security measures for the PDF.

**Digital Signatures:** Sign or certify your document; custom signature schemes and signature time stamping are available.

**Mark Redaction:** Black out confidential information in your text (available only in the Enterprise version - see below).

## Advanced toolbar



Use this toolbar to include movies, sounds, 3D files or Silverlight content in your PDF. You can view and edit 3D files.

**Imposition:** (right-most button): Prepare the PDF for DTP-style physical printing.

## Measure toolbar



Use this toolbar to measure dimensions inside elements in the PDF, whose scale you can define.

## Document Assembly



To edit page contents or perform page operations while viewing several pages, activate Document Assembly view in the View menu or by clicking the Document Assembly button at the bottom of your screen. The Document Assembly toolbar lets you insert, extract, delete and renumber pages; split your current document; or work with headers and footers (create, update or remove them). This view shows small-sized pages, not static thumbnails, so comments can be placed and text selections copied to other pages, even in other documents.

The right-most button is new: Page Assembly. It avoids the need to open multiple instances of the program to insert pages from a set of documents. Each document is displayed in a tab, using page thumbnails. This lets you view documents and drag-and-drop the desired pages into the target document. A wide variety of file types are supported, conversion to PDF takes place when required.

## Document Security

To modify the security settings for your document, click Document > Document Properties and choose the Security tab. This will always display your current settings. You can choose to protect your document by passwords or Certificate security at different levels.

## Searching and Indexing Documents

You can carry out text searches in the currently open PDF, all PDFs in a given folder or on a pre-built index file. Searches can be done using a single string, multiple search strings, patterns or masks. Use the Organizer to specify the search criteria. A PDF Index file (.zpi) is a searchable archive of PDF documents. Click Document > Indexing to create a new index, modify an existing one or to work with embedded indexes.

## Windows Desktop Search

Microsoft offers a Windows Desktop Search facility, to search through files of different types in specified folders. PDF Converter Professional provides WDS with the added benefit of including PDF files in these searches - this includes image-only PDFs.

## Reading Text Aloud

Use the command Read PDF in the Tools menu to have the PDF text read aloud. Choose the current, next or previous paragraph or page or the whole remaining document. Choose Properties to set the rate and volume. You can also save the PDF text to a sound file in the wav format. This facility is powered by the Nuance RealSpeak Solo Text-to-Speech engine.

## PDF Optimizer

Optimize your PDF to best fit its purpose. Click Tools > Optimize PDF and specify target requirements such as fast web view, object and image compression, scanned page settings, font embedding and more. You can also add tags to PDF files, to have their logical structure (paragraphs, titles, pictures, tables, cells, etc.) identified and logged.

## **PDF Printing**

In addition to the usual print choices you can choose to print the PDF with or without comments. You can also print form fields only, allowing you to print an empty form, fill it electronically, and then print your responses onto the empty form. The Imposition tools lets you to prepare PDF pages for physical printing.

## **Table of Contents**

Insert a Table of Contents in your document, based on bookmarks. Open the bookmark panel, set bookmarks and their ranking, then choose Table of Contents from the bookmark panel's shortcut menu. The TOC is useful when the PDF is physically printed and bookmarks are no longer available.

## **PDF Document comparison**

This lets you compare two PDF files with similar content - typically an earlier and later version of one document. Access this from the Document menu, then choose to see a visual or a textual comparison, with a side-by-side or combined presentation. The latter shows only one document and marks object or text changes: new text is underlined while deleted text appears in a marker tooltip.

## **PDF to Word Document comparison**

PDF Professional is able to compare a PDF file with a particular version of a Word file; typically this will be the file the PDF was made from. It can show which changes were made since the PDF was created. The comparison is made within Word, the result can be displayed in a temporary file that you can save if required.

## **PDF splitting**

You can split large PDF files into a set of smaller ones so they are easier to distribute. Access this from the Document menu and choose splitting criteria: by file size, blank pages, number of pages, bookmarks, document structure, etc. You can also extract pages by criteria that you specify.

## PDF portfolios

Portfolios let you collect a set of documents relating to a particular topic for convenient distribution. PDF Professional provides this by extending the previous PDF Create support for packages. A portfolio is superior to a package because it can contain documents of differing file types (all documents in a package must be PDF files) as well as folders and folder structures. Support for displaying non-PDF pages is added.

## Package PDF files

PDF Create lets you select a set of files and have their copies grouped in a single PDF package file. Any non-PDF files you select enter the package as PDF files. To include non-PDF files in a package in their original format, open a package, open a PDF inside it, and attach these files. You can add a cover page to the package. Help explains how different PDF programs let you use and unpack received packages.

## Place files in an Envelope

This is similar to packaging files, but in this case the files become attachments to the enclosing PDF and keep their original file types. An envelope file acts as a cover page.

## Archive E-mail

PDF Professional lets you archive selected e-mails and e-mail folders. You can choose to create a single PDF from each message, merge all selected archive items into one PDF (each message will be bookmarked inside it), or package the selected items. Message attachments keep their original file types.

## Batch processing

This lets you build a series of commands and their settings into a named and stored sequence, letting you efficiently apply pre-defined processing to groups of PDF files repeatedly, by just running a sequence. Input and output file names and locations can be predefined or enquired run-time and output can be to non-PDF file types. It is also possible to run a batch processing sequence on all PDF files currently open in PDF Professional. In that case the output is always PDF and it replaces the input files inside the program.



## Other new features

Support is introduced for PDF layers; this is useful in working with architectural plans and in preparing PDF files for delivery to printing houses. Document flattening allows annotations to be removed or converted to document objects. Integration of the program in internet browsers is expanded to Google Chrome and Apple Safari.



The following features are provided only in the Enterprise edition, along with Enterprise documentation for network administrators:

### Legal Support

Legal stamps are available, along with Bates stamping and CaseMap support for legal offices. Choose Inspect Document in the Document menu to select items to be removed from a file, such as comments, bookmarks, hidden text, embedded indexes or sensitive metadata like the author's name or the file history.

### SharePoint and DMS support

The program supports the following Document Management Systems: Microsoft SharePoint, Interwoven WorkSite, Hummingbird Enterprise, Hummingbird DocsOpen and LiveLink. See System Requirements in Help. The ability to create PDF files from or inside DM Systems is documented at the end the PDF Create section of this guide. The ability to unlock PDF or XPS files is similarly documented at the end the PDF Converter section. A menu item and a toolbar are added to PDF Professional for each detected DM system, allowing you to open PDF files from the DMS, save PDF files to DMS, access the DMS document properties, extract or insert pages to or from the DMS or select a file of any type from the DMS to have it attached to the current PDF document. Commands from PDF Professional are also available inside SharePoint, Hummingbird Enterprise and Interwoven Worksite.

## Redaction

Document text confidentiality is achieved by redaction - the blacking out of pieces of text or images. Select text or images to be marked for redaction with the Redact tool in the Document menu or the Security toolbar. This menu also allows marking for redaction by searching. The program finds all occurrences of a given text string in the document, letting you review them and choose which will be marked for redaction. Use the Apply redaction menu item or button to have all marked items (whether resulting from searches or selection) blacked out permanently. When a redacted document is saved, the program always offers Save As, because you should save the redacted file to a new name. The original file remains with the redacted items marked but still readable.

### Warnings:

- Be aware that once a file is saved with redacted items, there is no way of restoring the removed content – it can neither be viewed nor found by searching.
- If text to be redacted contains typing errors, maybe some sensitive data will not be removed by searching. We suggest that you always check a search-redacted document manually before releasing it.





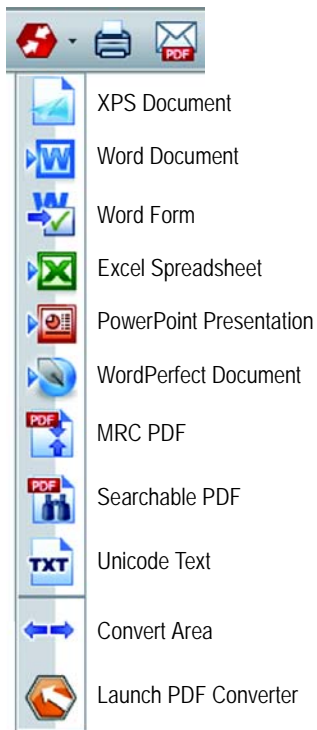
# Export PDF Files

## Starting the Program

To make the services of PDF Converter easy to call on, it can be started from several locations, as described in the following overview table and procedures.

Location	Source PDF/XPS	Conversion method	Target
PDF Professional File/ Save As menu or button or Tools/Launch PDF Converter	Current PDF in PDF Professional	Converter Assistant or Direct Conversion with chosen mode and target	User defined
Windows Start Menu	Local or DMS files	Converter Assistant	User defined
Microsoft Word (Open PDF/XPS button)	One local file	Converter Assistant	Microsoft Word
Microsoft Word (File Open)	Local files	Converter Assistant Direct Conversion	Microsoft Word Microsoft Word
Corel WordPerfect	One local file	Converter Assistant	WordPerfect
Microsoft Excel	One local file	Converter Assistant	Excel
Microsoft PowerPoint 2007	One local file	Converter Assistant	PowerPoint 2007
Windows Explorer	One local file	Converter Assistant Direct Conversion	User defined As last set
Microsoft Outlook	One or more mail attachments	Converter Assistant Direct Conversion	User defined As last set
Lotus Notes	One or more mail attachments	Converter Assistant Direct Conversion	User defined As last set
Microsoft Internet Explorer	One web link	Converter Assistant	User defined
Mozilla FireFox	One web link	Converter Assistant	User defined

## Exporting PDF from the Professional program



The component that lets you export the content of PDF files to editable formats is called PDF Converter. Access it from the Convert PDF button in the File toolbar. Choose a direct conversion to be performed with current settings for the selected mode or choose the last item to open the PDF Converter Assistant for full control.



You can also perform direct conversions by selecting the Save As command from the File menu. You can extract and save only text from the document or save the file as image.

With the Convert Area tool, you can use the Select Area tool to define an area of interest in a page for PDF Professional to convert its content to an editable format. This lets you, for instance, select a table and send it to Excel without the rest of the page or select the precise content to become a single PowerPoint slide.

Conversion between PDF and XPS file formats is also supported.

## The PDF Converter Assistant

Start this from the Windows Start Menu. The Assistant lets you prepare and control conversions. Its Full view shows you a preview of PDF and XPS files to be converted and lets you set page ranges. The panel on the right lists all files selected for conversion; icons show loading or conversion status. Help explains the meanings of the icons.

PDF Converter offers four levels of control:

### **Quick View:**

This allows quick conversions using current settings for everything beyond four basic choices.

### **Full View:**

This presents the same four buttons from Quick View, but also displays page previews and offers all settings that influence the conversions. Choose a mode to see its settings. Choose a target (or click the Output tool when there is no choice) to set saving options. Full view lists all files in the current conversion session along with status information for each of them.

### **Left View:**

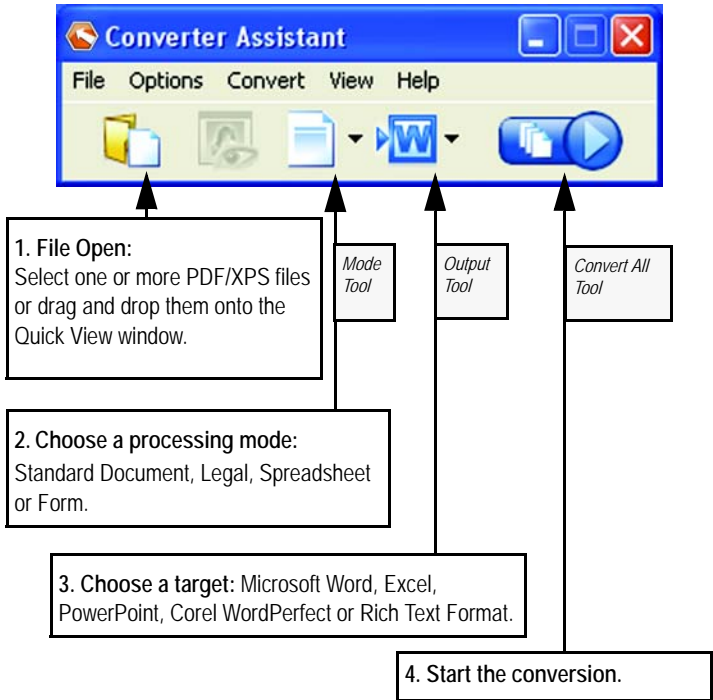
This appears when PDF Converter is called from inside a target application. Then only a single file can be converted, so just the left preview panel and its controls are needed. Click a button or use the View menu to change the contents of the left panel.

### **No Assistant:**

From starting places where the input file and target are pre-defined, you can by-pass the Assistant altogether and perform a direct conversion using existing settings. See *Starting the Program from other places*.

## Converting with Quick View

Choose **Quick View** in the View menu. Then your conversions are an easy 4-step process, using current settings for everything else:



During conversion, the buttons are grayed. If **View Result** in the Output Options panel is selected, the converted file appears in its target program.

Turn off the Quick View toggle in the View menu to return to Full view to see the processing summary, inspect and change settings or view page previews. If you close the program with Quick View active, it will reappear when the program is next started.

# Converting with Full View

Here is the Assistant in Full View. Three sample files are loaded, the sample form is displayed in the Preview panel on the left.

The screenshot shows the 'sample form - PDF Converter Assistant' window. The interface includes a menu bar (File, Options, Convert, View, Help), a toolbar with icons for file operations and conversion, a file list on the right, a preview panel on the left, and a page navigation section at the bottom. Callout boxes provide detailed instructions for each major component.

Restore preview

Select conversion mode and target and display their settings

Convert selected file

Remove files from list

Move files up or down in the file list

Open files

Convert all listed files

Preview panel showing current page of selected file

List of loaded or converted files. Icons show file status. You can add files by drag-and-drop.

View source or result file of selected item.

This icon shows that the page has a text layer.

Pages without a text layer display this icon:

Preview each page of your PDF/XPS using these navigation buttons.

Specify a page range here. By default all pages are converted.

Filename	Page Ra...
sample form	1
sample sheet	1
sample document	



## Starting the Program from other places

To make the services of PDF Converter easy to call on, it can be started from several locations, as described in the following procedures:

### The Windows Start Menu

Choose PDF Converter Assistant from the Nuance PDF Professional 6 group in Programs or All Programs. All conversions started from the Start menu use the PDF Converter Assistant. It allows you to name input PDF or XPS files from your local computer or a Document Management System and decide how to handle output files. Display of the created file is optional.


### The Open PDF/XPS button in a Microsoft Word Toolbar

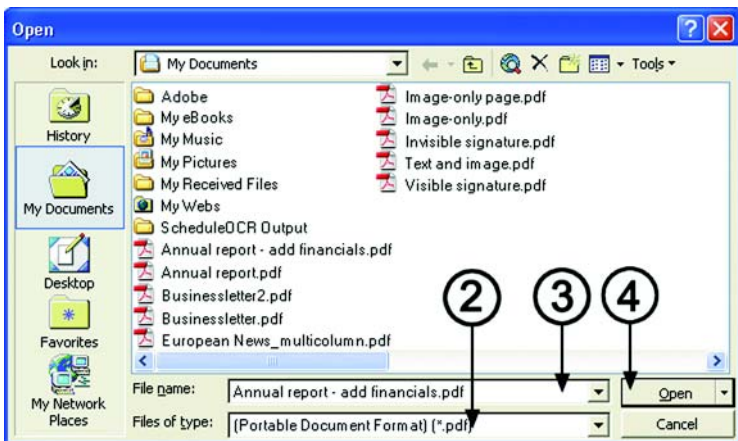
1. Use the Open PDF/XPS button  in a Microsoft Word toolbar or the **Open PDF/XPS...** item in the Word File menu to call an Open dialog box with PDF selected as file type. In Word 2007 go to the Nuance PDF tab, or access the File menu via the Office button.
2. Choose a single PDF or XPS file, browsing if necessary. Click Open.
3. The Converter Assistant preview panel displays the first page of the input file. View other pages and set a page range if desired.
4. Select the processing mode with the Mode tool or from the Options Menu. This calls the settings panel for the chosen mode. Make settings as desired.
5. Click the Output tool or select Word Document (the only possible target) in the Options menu to select saving options including whether to save to Office 2007 or to earlier versions.
6. Press  to start conversion, with a progress monitor. The resulting file is displayed in Microsoft Word ready for editing.



**Note:** In Office versions before 2007, if you do not see the Open PDF/XPS button in a toolbar, go to View > Toolbars and select Nuance PDF, or open the Preferences dialog box of the PDF Converter Assistant to enable Microsoft Word integration and restart Word.

## The Open Dialog Box in Microsoft Word

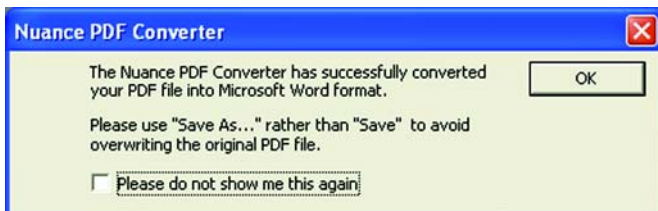
1. Click Word's File Open button  or go to the Microsoft Word File menu and click Open...
2. Select PDF (Portable Document Format) (\*.pdf) or XPS in the Files of type box.
3. Select the PDF or XPS file you want to convert. Multiple selection is possible; then files are converted one after the other.
4. Click Open. (The picture shows steps 2, 3 and 4.)



5. Conversion starts with or without the Converter Assistant, as specified in the PDF Converter 7.0 Settings dialog box, found in Word's Tools menu. In Word 2007 and 2010, the PDF Settings button in the Nuance PDF tab displays the dialog box.
6. If the PDF Converter Assistant is enabled, the PDF/XPS is previewed and you can change mode settings before starting the conversion. If the PDF Converter Assistant is disabled, conversion

starts immediately, using the existing settings for the pre-defined mode.


7. Converted, editable documents are displayed in Microsoft Word.
8. A converted document will display as if it were still the PDF or XPS file. You must save it as a Word document with the command **Save As...** If you use **Save** or **Close** without saving, you will lose either the converted document or the original file. The program warns you of this:




## WordPerfect

Use the **Open PDF/XPS** item in the File menu of WordPerfect. Select a single PDF file and click Open. View pages in the PDF Converter Assistant in Left view. Set a page range if desired. Select a mode (standard or legal document) and its settings. Set output settings. Click the **Convert All** button. The resulting file is displayed in WordPerfect, ready for editing.

## Microsoft Excel

Use the **Open PDF/XPS** button  in a Microsoft Excel toolbar or the **Open PDF/XPS** item in the File menu. For Excel 2007 or 2010, see above under Word 2007. Select a PDF or XPS file and click Open. View the PDF in the PDF Converter Assistant left view. Set a page range if desired. Click the **Spreadsheet** button (the only possible mode) to set conversion options, (including one worksheet per table or per page). Set output settings. Click the **Convert All** button. The resulting file is displayed in Microsoft Excel ready for editing.

## Microsoft PowerPoint 2007 or 2010



Use the Open PDF/XPS button  in the Nuance ribbon. Select a single PDF or XPS file with content suitable for a slide presentation and click Open. Select settings and a page range if desired. Click the Convert All button; the converted file appears in PowerPoint 2007 or 2010. To view it in older PowerPoint versions you will need a Microsoft Office compatibility pack.

## Windows Explorer

1. Right-click on a PDF or XPS icon or file name in Windows Explorer or a PDF or XPS icon on your desktop.
2. Choose a conversion mode and target from the shortcut menu. If you choose to use the Assistant, you make these choices in its Preview panel.



## Microsoft Outlook

1. Click the  Settings button in the Nuance PDF for Outlook toolbar or the equivalent item in the Nuance PDF menu. Choose to use the Converter Assistant or perform a direct conversion to a target you choose. Specify whether all PDF/XPS attachments should be converted, or request a file list so you can select which files to convert. These settings apply to all conversions until changed.
2. Select a message with one or more PDF or XPS file attachments.
3. Click the PDF Converter button  in the Outlook toolbar or in the message toolbar. In Outlook 2007, use the Nuance PDF tab in the message window.

- If you requested prompting, select which attachments to convert in the **Attached files list** dialog box. Click **OK**.
- PDF Converter Assistant appears if you requested this. Preview pages, specify a page range if desired, adjust settings including the saving instructions and click **Convert All**. If you requested a direct conversion, a progress monitor appears and the file is saved to the predefined location with the same name as the source file.










The procedure is the same in Lotus Notes (v. 7.0 or 8.5).






### Microsoft Internet Explorer and Mozilla Firefox

- Right-click on a hyperlink leading to a PDF or XPS file.
- Choose **Open with Nuance PDF Converter 7.0**.
- The Assistant downloads and converts the file.

## Processing modes and outputs

Choose from four processing modes, depending on the content of the PDF/XPS file to be converted and the type of output you want. Here are your choices:

Mode	Output
 Standard Document	    Word Word 2007      PowerPoint 2007      WordPerfect      RTF
 Legal Document	   Word Word 2007      WordPerfect      RTF

Mode	Output
 Spreadsheet	 Excel Excel 2007
 Forms	 Word Word 2007  RTF

The settings for each mode are displayed on the left panel of the Assistant when you make a mode selection. The values are stored separately for each mode - this includes the image-only processing and graphic handling options that are common to all modes.

The output settings are displayed in the left panel when you make an output selection. The settings are the same for all targets and only one set of values is stored for use with all saving.

Create Word or Excel 2007 output files by selecting the checkbox 'Generate Office 2007 output' in the appropriate output panel. PowerPoint output is always for Office 2007; a downloadable plug-in from Microsoft extends this to Office 2003. See Help.

Next we summarize the choices unique to each mode.

## Standard Document conversions

Choose how the layout should be maintained:

- True Page<sup>®</sup> places all elements in text boxes or frames.
- Flowing Column uses text boxes and frames only when necessary, allowing body text to flow from one column to another.

## Legal conversions

Choose to retain or drop legal-specific features:

- Pleading numbers - these typically appear in left margins to define line numbers.
- Images - these are typically stamps, seals, signatures or company logos.

## Spreadsheet conversions

This mode can be used for PDF files containing partly or mainly tables. Choose what should be placed in each Excel Worksheet:

- **Per Page:** Each page from the PDF will enter a separate worksheet. This will happen even if page content is not tabular; you can specify a page range to exclude unneeded pages.
- **Per Table:** Each detected table is converted and placed in a separate worksheet. All content not detected as a table is placed in a separate worksheet at the end. The detected tables do not appear here, but are replaced by hyperlinks leading to the relevant worksheet table.
- **Per Document:** All content destined for a single output document will be transferred to a single sheet. This is useful for handling tables which extend over several pages.

When you do Standard Document conversions, tables in the PDF become tables in the output file.

## Form conversions

This uses Logical Form Recognition™ technology to detect form elements and convert them correctly. Choose from:

- **No form controls:** The result will be a fillable form with static form elements. You can use form handling tools in the target application to modify the form design.
- **Create form controls:** The result will be a fillable and editable form. You can change field labels and modify the form design.

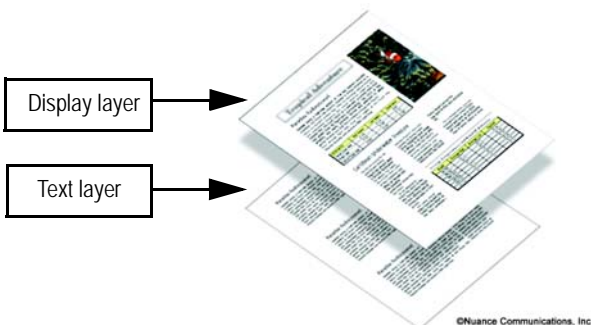
## Handling Mixed Input Files

Files often have mixed content: flowing text, tables and forms. In many cases you can process these files with the setting Standard Document and receive good results. For more precise control, you can use page ranges to separate forms and tables and convert them separately. For example, to best unlock a file with two pages of illustrated text, followed by a one-page table you want to do calculations on, and finally a three-page form - convert pages 1 and 2 as Standard Document, page 3 as Spreadsheet and pages 4-6 as Form.

## How do PDF files work?

PDF files display texts correctly wherever they are viewed because they carry their typographic information with them. Fonts in the document are embedded in the PDF file and are used after distribution to reconstruct the document. The display does not depend on the needed font files being available on the viewing machine, nor on the language of its operating system.

PDF documents present their pages as images. They can be marked-up and commented, but the ability to change the basic text is limited. Most PDF files can be searched, because the file has two layers. There is an image layer that is presented on-screen. Behind that there is usually a text layer that can be matched to the characters displayed on the screen.



When the starting point for a PDF file is a set of images, or a scanning process, this text layer is not present and the result is an image-only PDF. When the starting point is an editable document, the text layer can be created and the PDF is called 'Normal' or 'Searchable'. The creator of a PDF can require provision of a password to allow access the text layer.

## How does PDF Converter work?

PDF Converter has the ability to perform Optical Character Recognition (OCR). This is the process of extracting text from an image. It does not need to use OCR to unlock PDF or XPS files with an accessible text layer - it must capture the page layout and arrange the given text and other elements correctly on each page in the new document.

Optical Character Recognition (OCR) is normally used only for input pages without an accessible text layer or when non-standard character encoding is detected, but you can require it for any conversion under Processing Options in the Converter Assistant.

## Handling Image-only Pages

Pages without a text layer are a special case for conversion. You can decide how the program should handle these pages: convert them with the built-in Optical Character Recognition (OCR), transfer them as images to the target document or skip them. You can require inspection of the first pages (up to ten) in files you open. Optionally, you can set conversion to be stopped, if no text-layer pages are detected.

If you have Nuance® OmniPage®, you can use this to have more control over the recognition process.

## Language Support

PDF Converter supports over 100 languages, including Danish, Dutch, English, Finnish, French, German, Italian, Norwegian, Polish, Portuguese, Spanish and Swedish. The program can convert multi-lingual documents. A full list of supported languages is provided in Help. Correct language choice is important for converting image-only



pages and handling non-standard encoding. A new choice is Auto-detect which is designed for unattended processing where input image-only PDFs might be in different languages. This examines each PDF and assigns a language to it, choosing from the 22 languages with dictionary support.

## SharePoint and other DMS support

This is available for the program when it is supplied as part of PDF Converter Enterprise 7. PDF or XPS files can be opened from Microsoft SharePoint through a set of dialog boxes incorporated in PDF Converter, accessed from the File menu item **Open from SharePoint**. Other detected Document Management Systems (Hummingbird, Worksite, DocsOPEN, LiveLink) also have a menu item; they can be accessed directly through their own interfaces. See Help for detail. Converted files can be stored in SharePoint or other systems with the Store in Document Management System section in the Output Options panel.

Inside SharePoint, Hummingbird Enterprise and Interwoven Worksite it is possible to choose a single PDF or an XPS file, call the Converter Assistant to have it converted and directed to a location on the local computer, or returned to the DMS.

## XPS File Support

The support for XPS files provided by the members of the PDF product family is as follows:

---

	Professional	Create	Converter
XPS to PDF	Yes	Yes	No
PDF to XPS	Yes	No	No
Unlock XPS (XPS to Word, etc.)	Yes	No	Yes

---

These last two topics relate to PDF Converter Professional.

## Web Updates

Select **Automatic Web Updates** under the Help menu to be informed whenever a program update is available for any of the three components. You can also get the latest program updates directly from the Help menu. Please ensure that web access is available.

## Un-installation

1. Select **Add/Remove Programs** from the Control Panel. Under Vista, select **Programs and Features** from the Control Panel.
2. Select **Nuance PDF Professional 7.0**.
3. Click **Remove** to uninstall the program or **Change** to auto-repair it. This removes all three components of PDF Converter Professional.

A de-activation step is performed at the start of uninstallation, allowing you to reinstall the program later without re-activation problems. De-activation requires web access.



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