## PDFDOCS DESKTOP

Portable Document Format (PDF) is a file format created for document exchange. Editing a PDF is very limited. pdfDocs desktop facilitates the creation, manipulation and management of PDF documents from any software application and/or scanner.

PDFDOCS ORGANISER

pdfDocs Organiser is the first window to appear when pdfDocs is launched or when anything is printed to the pdfDocs printer. Documents displayed in the Organiser are already in PDF format and are available for processing.
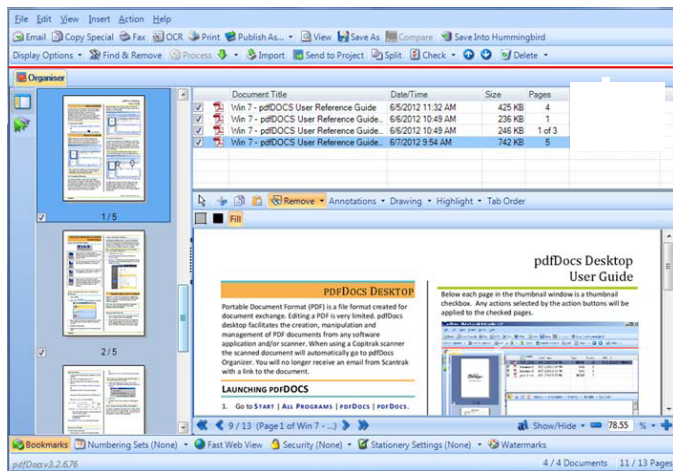
THE THUMBNAIL WINDOW

The thumbnail window on the left side of the pdfDocs Organiser displays a thumbnail of each page of a document that has been sent to pdfDocs. Each thumbnail is numbered corresponding to the page number of the pdf document. (If a document has 30 pages, the first thumbnail will be 1/30.) If you have more than one document in the organiser, the pages of each document are numbered separately.

Below each page in the thumbnail window is a thumbnail checkbox. Any actions selected by the action buttons will be applied to the checked pages.
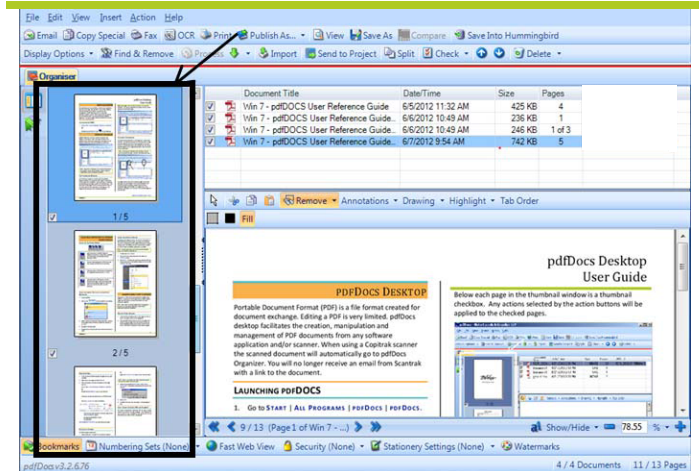
DOCUMENT CHECKBOXES

To the left of each document in the Organiser is a document checkbox. The checkbox indicates that the document or page has been selected and actions will be applied by the action buttons. If multiple documents are checked then they will be collated together into a single pdf document when the action buttons are clicked.

NOTE: Please pay close attention to the Checkboxes because once the document or page is checked, it is selected for processing.
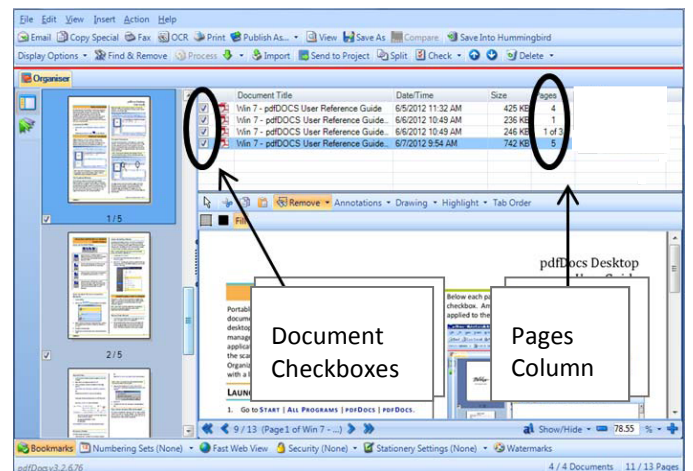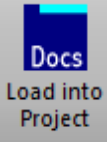

The pages column shows the number of pages within each document that are checked, which will be included in the final PDF created by pdfdocs using the Action Buttons. Unchecked pages are excluded. (if 5 pages out of 7 are checked it will display 5 of 7 and only the 5 checked pages will be processed.)

CREATING/CONVERTING A DOCUMENT TO PDF FORMAT

USING THE DOCSCORP RIBBON
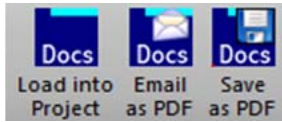
	Sends document to pdfDocs Organiser (Organiser displays list of documents available for processing) – automatically converts document to PDF.
	Converts Word document to PDF format and then attaches the PDF file to a new email.
	Saves document in PDF format to the Desktop or a specified network drive.

USING THE IMPORT BUTTON IN THE PDFDOCS ORGANISER

1. Launch pdfDocs.
2. Click on the **Import** button located on the toolbar.
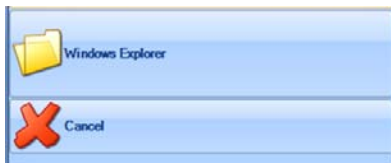
3. Select Windows Explorer (ie: desktop, my documents).
4. Navigate to the document.
5. Double click on the document and it will be converted to a PDF.
6. Click PRINT. The document will be converted to PDF and automatically sent to the pdfDocs Organiser with the DM number in the name.
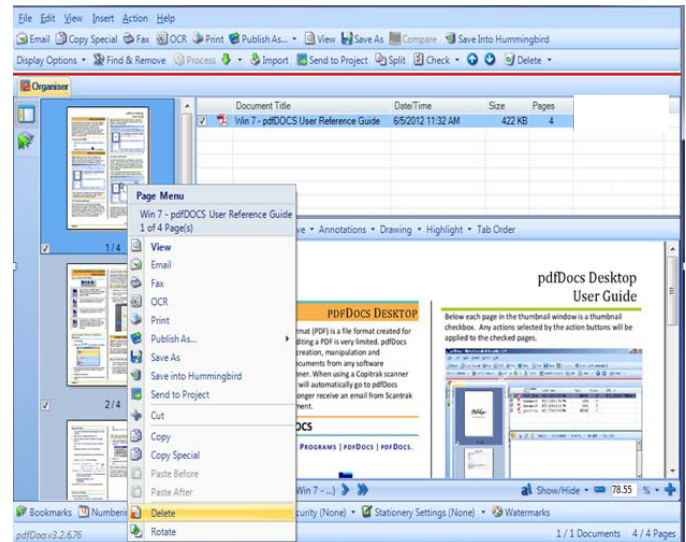
MANIPULATING A PDF DOCUMENT

Documents in a PDF can be manipulated or changed using pdfDocs. It is possible to move pages around, delete specific pages, split documents into parts and collate 2 or more documents together.

MOVING PAGES AROUND

1. In the Thumbnail Window click on the page you want to move. The page should now be highlighted.
2. Click and hold the left mouse button on the page to be moved. Drag the page to the new location (thumbnail will be highlighted yellow) and let go of the left mouse button. The order of sequence has now been changed.

DELETING PAGES

1. In the Thumbnail Window locate the page that you want to delete.
2. Right Click on the page and select DELETE.

3. When prompted to confirm the deletion of the page, click YES.
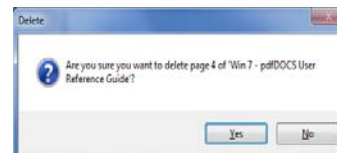

SPLITTING A PDF DOCUMENT INTO PARTS

Documents can be divided based on a number of standard options such as splitting a document at a specific page, file size or splitting a document based on a set number of pages. The original document will be maintained in its original state. The split document will appear in pdfDocs Organiser in parts, such as part 1 or part 2.
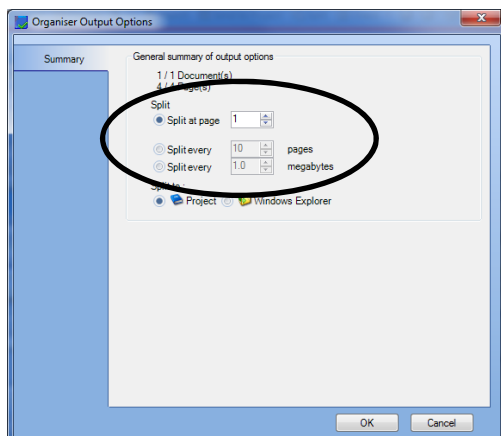
1. In the Organiser window check the box beside the document that you want split.
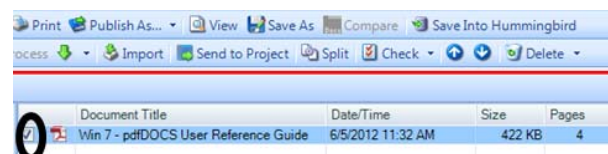
2. Click on the **Split** button located on the toolbar in pdfDocs Organiser. The Organiser Output Options window will appear.
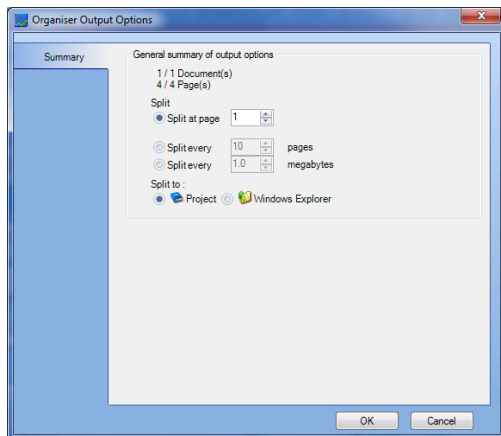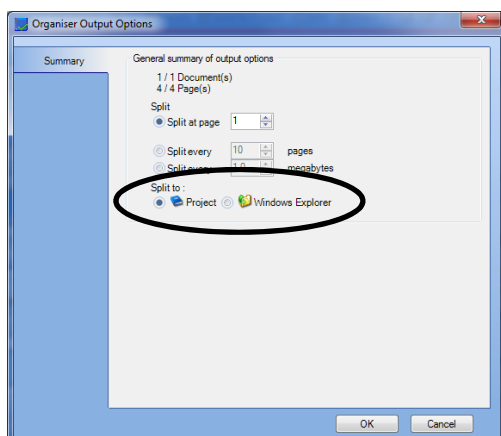

3. Choose how to split the document. You can choose to split the document:


- At a specific page
- By a set number of pages

OR

- By file size.

4. Select where you want the split documents saved to. You can select to have the document Split to:

- Project (make sure to select a Project i.e. the Organiser Project which is the default). The split

documents will appear in the Organiser window in separate parts, such as part 1 or part 2. (along with the original version)
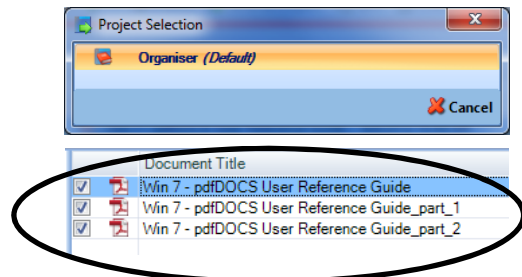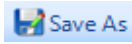

OR

- Windows Explorer which allows you to save the split parts to a selected folder or network drive.

COLLATING (COMBINING) MULTIPLE DOCUMENTS

Two or more Documents can be collated (or combined) using pdfDocs.

Saving A Collated Document To A Network Drive or Folder

1. In the Organiser window check the box beside the documents that you want collated.

2. Click the **Save As** button to save the collated document to Windows Explorer (a network drive or folder).
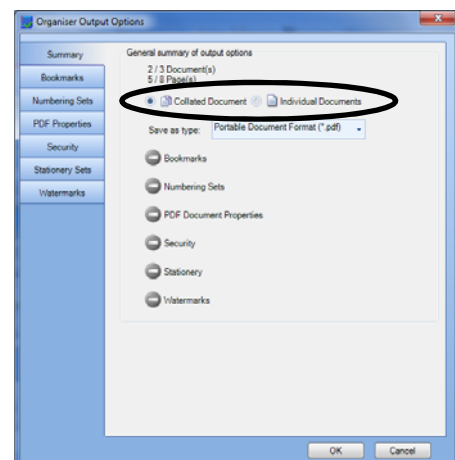
3. An Organiser Output Options window will appear. Select the COLLATED DOCUMENTS option to combine the selected documents. If Individual Documents is selected, the documents will be saved as separate files.

4. Select a SAVE AS TYPE (PDF is the default).

5. Click OK.

6. Select a location where the collated document will be saved and click the SAVE button.

Optical Character Recognition (OCR) is designed to create text searchable PDF documents or editable Word documents from scanned images, faxed documents or text based PDF documents.

CREATING AN OCR DOCUMENT

1. Scan or import the document(s) that are to be converted to OCR into the pdfDocs Organiser.

2. Ensure that the document checkboxes for the document(s) that are to be converted are checked (and that these are the only document(s) that are checked)

3. Click the [OCR] button.

4. The Organiser Output Options window will appear. If you are converting more than one document, select whether to collate the documents or have them saved individually.
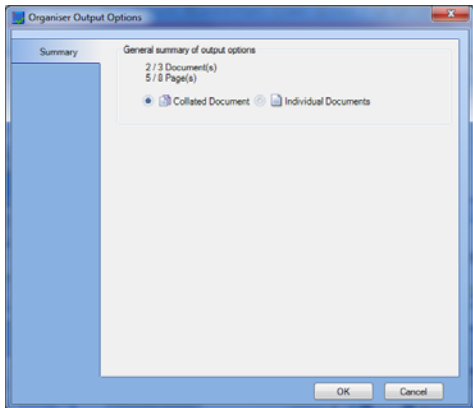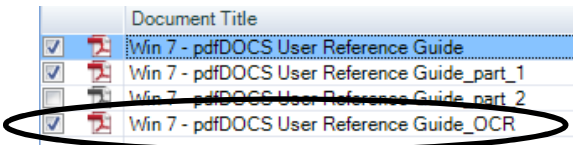

5. Click **OK**.

Saving An OCR Document as A PDF

1. In the OCR Options window that appears, select the **AS PDF** option under Output Options.

2. In the PDF Options section of the OCR Options window, ensure **PRESERVE IMAGE RESOLUTION AND COMPRESSION** is checked.
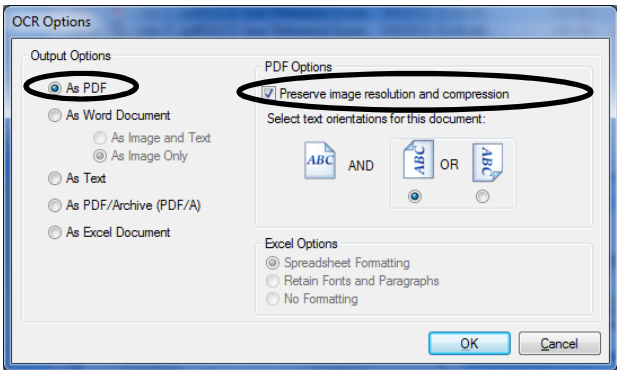

3. Click **OK**. An OCR Progress pop-up window will appear. Wait for the OCR to complete. The OCR document(s) will appear in the pdfDocs organiser window and will have "OCR" appended to the end of the document name.


MENU/TOOLBAR OPTIONS

When you have documents and thumbnail pages checked, you can right click on a document to display the Document Menu and you can right click on a thumbnail to display a Page Menu. The Document Menu and Page Menu will also show the number of documents and pages selected for processing. Any of the actions in the Document and Page menus can be applied to your selected documents and pages respectively.
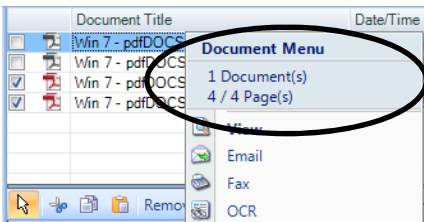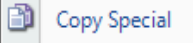
RIGHT CLICK DOCUMENT/PAGE MENU OPTIONS
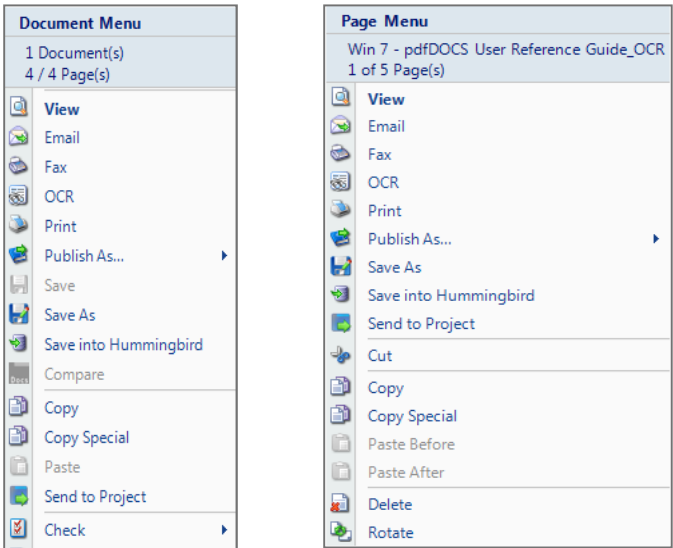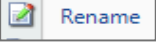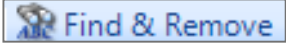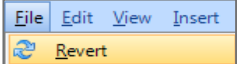

View	Allows you to view the selected (checked) document in Adobe Reader.
Email	Attaches selected PDF document to a new email.
Print	Prints the selected document/pages to any printer on your system. It opens the

	document in Adobe Reader with the default printer preselected (can be changed).
Save As	Saves the selected document(s) onto your desktop, My Documents, C:\.
Copy	Copies the selected item within pdfDocs and using the Paste Button will insert the copied selection within pdfDocs.
Copy Special	Copies the selected item within pdfDocs and allows you to paste the copied item outside of pdfDocs. When clicked the Organiser Output Options window will appear, allowing the copied item to be renamed before being pasted to the desired location.
Send to Project	Allows you to send documents to a selected Project.
Check — Check All Pages / Uncheck All Pages / Invert All Pages	Allows you to check or uncheck all the pages in a document.
Delete	Deletes the PDF document from the organiser list. It does not delete the original document that was sent to be converted. To delete a specific page right click on the page in the thumbnail window and select delete. To delete the whole document right click on the document in the organiser list (make sure it shows all pages selected).
Rename	Allows the renaming of the document.
Rotate	Can rotate every page in a document or just a selected page.

ADDITIONAL TOOLBAR AND MENU OPTIONS

⬆ ⬇	Allows single items in the organiser list to be selected and moved up or down in the

|	
	list. This has the effect of changing the collation order of a document.
Find & Remove	Takes the user directly to the Find/Remove function in Desktop Editor. Please refer to the "Text Redaction Using Text Search" section.
File Edit View Insert / Revert	Located under the File menu, the Revert button acts in the same way as an Undo button would function with the added benefit of some options to allow for a complete or partial revert.

DESKTOP EDITOR

The Desktop Editor allows you to view and annotate pages of your PDF prior to saving or emailing the completed document. This allows you to remove/find text (known as **Redaction**) by either text selection or by text search and place **Form Fields** on your PDF.
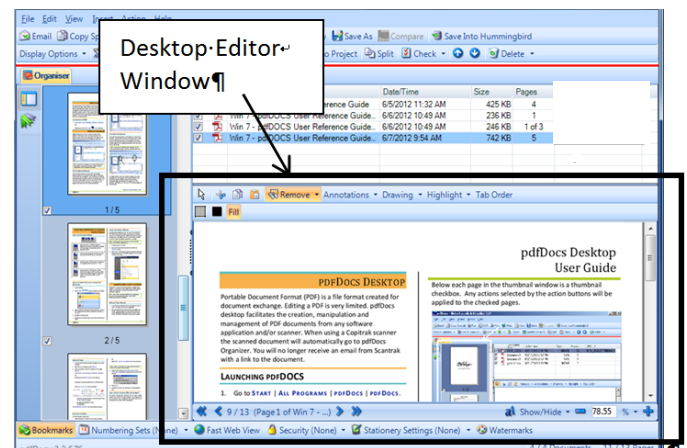

The Desktop Editor gives you the option to remove text from PDF's so that no one reading or processing the PDF will be able to find out what information has been redacted. It inserts a black box or a white (blank) space where the text was located in the document.

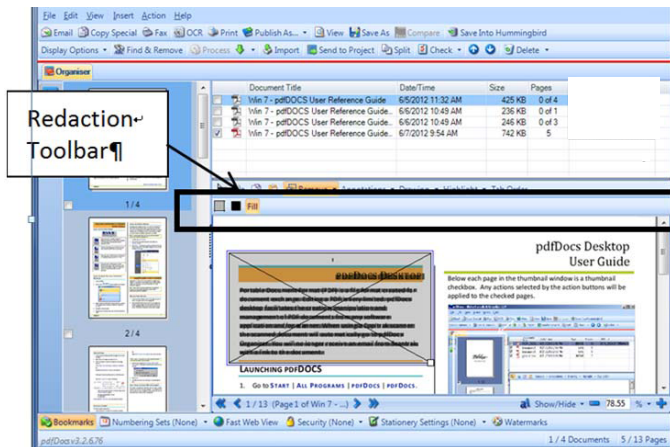### TEXT REDACTION (FIND & REMOVE) USING TEXT SELECTION

1. Click on the document in the Organiser list. The document will appear in the Editor window below.

2. In the thumbnail window, scroll to the desired page and click on it. The selected page will now appear in the Editor window.

3. On the Desktop Editor toolbar, click on the drop down arrow to the right of the REMOVE button.
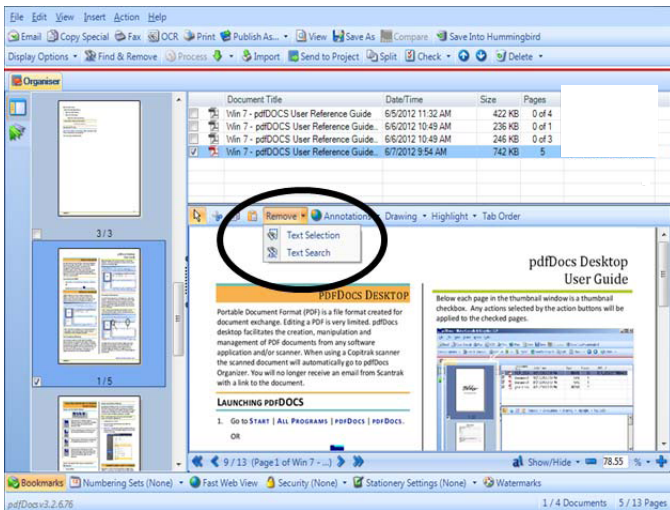
4. Click **TEXT SELECTION**. Your mouse pointer will become a cross.
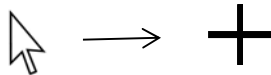
5. Locate the area on the page that you would like redacted (covered up). Using your mouse, draw a box over the area by clicking and holding down the left mouse button and dragging the cross to the desired sized. The selected text is now redacted. No one reading or processing the PDF will be able to retrieve the redacted information.
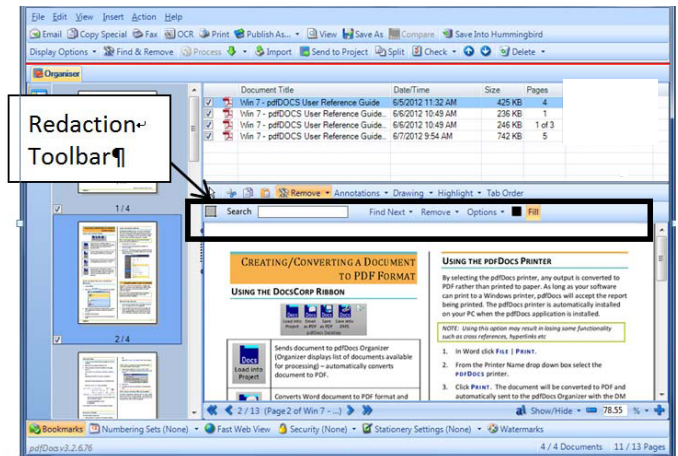

6. The redaction box can be adjusted to fill in black or white by selecting the box in the Desktop Editor and clicking the **FILL** button on the Redaction toolbar.

## TEXT REDACTION (FIND & REMOVE) USING TEXT SEARCH

1. Click on the document in the Organiser list to process an entire document or select individual pages from the Thumbnail window.

2. On the Desktop Editor toolbar, click on the drop down arrow to the right of the **REMOVE** button.

3. Click **TEXT SEARCH**.
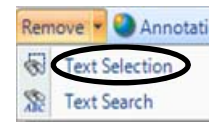
4. A Redaction toolbar will appear in the Desktop Editor Window. To expand or restrict the pages that are searched, click **OPTIONS | PAGES** and select the appropriate page option from the Redaction toolbar.

5. Enter the text to be found or removed into the **SEARCH** field on the Redaction toolbar.
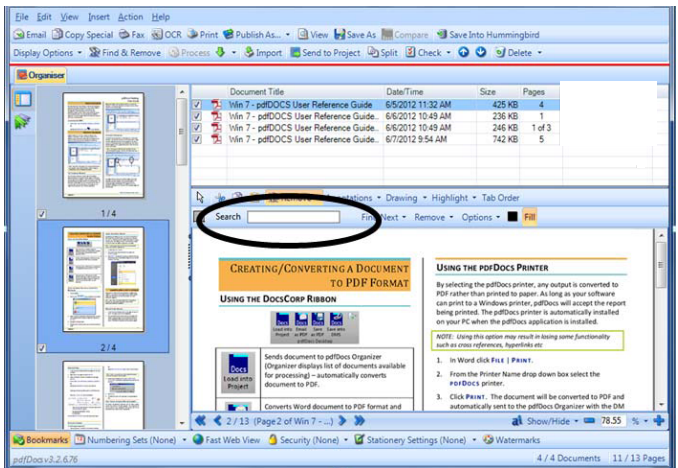
6. Click the **FIND NEXT** button on the Redaction Toolbar to locate the desired text within the selected document/pages.

OR

Click the **REMOVE** button on the Redaction Toolbar to locate and redact the desired text within the selected document/pages.

OR

Click the **DROP DOWN ARROW** to the right of the remove button for additional redaction options (such as Remove All or Remove Next).

7. Redaction boxes can be adjusted to fill in black or white by selecting the box in the Desktop Editor and clicking the **FILL** button on the Redaction toolbar.