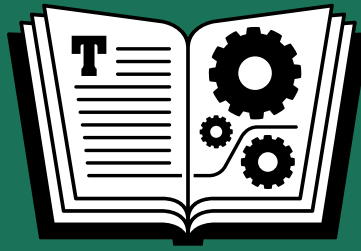


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Read Me First

Welcome to *Take Control of PDFpen 7*, version 1.0, published in February 2015 by TidBITS Publishing Inc. This book was written by Michael E. Cohen and edited by Kelly Turner.

This book tells you how create, edit, and enhance PDF documents on the Mac with Smile’s PDFpen 7 and PDFpenPro 7, and on the go with PDFpen for iPad & iPhone.

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What’s New in This Edition

There are two kinds of newness involved in this new edition: what is new in the software itself, and what is new in the environment in which PDFpen runs.

New and changed features:

- PDFpen provides an OCR layer that you can view; what’s more, you can [Edit the OCR Layer in PDFpenPro](#).
- The app has changed how you [Navigate with Search Results](#).
- A Control-click provides a contextual menu with editing and navigation commands applicable to whatever you’ve clicked; see [Understand the Tools](#).
- You can now [Draw Attention](#) with free-form highlighting.
- PDFpenPro offers Excel and PowerPoint options when you [Export to Microsoft Formats](#).
- PDFpenPro gives you the ability to [Make an Interactive Signature](#) field in forms, and you can sign such fields with PDFpen (including PDFpen for iPad & iPhone).

Changes in the Apple environment:

- PDFpen requires OS X 10.10 Yosemite, and its user interface has been redesigned to match Yosemite's style.
- When you [Get Your Hands on PDFpen](#) directly from Smile, you can access documents stored in iCloud Drive; I provide more details in [Head in the iCloud](#).
- PDFpen for iPad & iPhone has been completely revised, and it is now a single app that runs on the iPhone, iPod touch, and iPad. See [Use PDFpen in iOS](#) to learn mobile editing techniques and find the tools you need, and for advice on how to [Get PDFs in and out of PDFpen in iOS](#).

Note: My descriptions of the various Mac versions of PDFpen are based upon version 7.0.1. I suggest you update to that version or a later one if you haven't already done so. This book should work with any subsequent updates to PDFpen, but I suggest that you check the blog for this book occasionally (a link can be found in [Ebook Extras](#)); we often provide information about updates there.

Introduction

My office is something of a Vault of Antiquity. To the left of my desk is an old three-drawer metal file cabinet bursting with paper documents, many of them typed long before the advent of word processing technology. Another desk has drawers full of floppy disks and data cartridges dating back to the dawn of personal computing. (I even have a box of punch cards in the closet.)

As far as the paper files are concerned, they remain as easy to read as the day they were typed; their major drawback is they take up so much storage space for so little data. And if I *did* want them in digital form, I could easily scan and OCR them with PDFpen (in this book I explain how—in fact, one of those typed relics makes a guest appearance).

The documents stored on my floppy disks and data cartridges are another matter. Even if I could MacGyver together some hardware combination to access their contents on my Mac, most of the documents stored on these artifacts of another age are in obsolete formats that render them almost completely indecipherable.

There is one exception: the PDF documents on my antique storage media. If I could get those on my Mac, they likely would be as readable as the day they were created. After all, one of the main selling points of PDF is that the format was *designed* to be readable across platforms and almost impervious to the ravages of time. And that's great.

Unless, that is, you want to edit your PDFs or reuse their contents. PDF was not designed for that.

And that's where PDFpen comes in. The PDFpen family of apps can open and edit nearly any PDF you throw at it with ease, and can even export its contents into modern word processing formats. If a PDF is like a locked museum display case of content labeled "Look but don't touch," PDFpen is your set of picklocks.

The following pages explain how to use them.

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You don’t *need* to know most of the information in this chapter to use PDFpen productively. If you are eager to get going, feel free to jump ahead to the next chapter, [Understand the Tools](#). But if you like to understand *why* as well as *how*, this brief chapter gives you background on how the PDF file format evolved, what it can contain, and what you can reasonably expect to be able do with it.

A Short History of the PDF Format

Interestingly, HTML and PDF both originated from similar dreams at roughly the same time: the late 1980s. In the case of HTML’s creator, Tim Berners-Lee, the dream was to make the scientific papers being developed at the CERN particle physics lab in Switzerland available to all the CERN scientists using the lab’s computer network, regardless of the type of computer attached to the network. In the case of John Warnock, PDF’s creator and one of the founders of Adobe Systems, it was the dream of “being able to send full text and graphics documents (newspapers, magazine articles, technical manuals, etc.) over electronic mail distribution networks,” regardless of the type of computer receiving them.

Adobe had already achieved major success with its invention of PostScript, a computer language designed to describe the contents and layout of document pages in such a way that a printer (most notably, the first Apple LaserWriter printer) could print those documents faithfully at any resolution. PostScript, a device-independent language, became one of the foundations of PDF.

What Does PDF Stand For?

PDF stands for Portable Document Format. Therefore, saying “PDF format” is as redundant as saying “the La Brea Tar Pits” or the “NBC broadcasting company.” However, human nature being delightfully perverse, the description of the file format has become synonymous with files that use the format, so that now the terms “PDF,” “PDF document,” and “PDF file” all refer to the same thing.

In 1991, the same year that HTML 1.0 was unleashed upon the world, Adobe introduced something at the Seybold conference that it called Interchange PostScript, or IPS—the first public mention of what would become PDF. IPS became known as PDF 1.0 at Comdex in late 1992. By the middle of the following year, Adobe released the first tool for editing and viewing PDF documents: Acrobat 1.0 (which Adobe originally called Carousel).

Since that time, the nature and capabilities of PDF have been inextricably linked to the current version of Acrobat. Almost every major release of Acrobat has been tied to a major revision of the PDF specification. A [Wikipedia article](#) summarizes the high points.

Note: PDF version 1.7 became an official ISO standard (ISO 32000-1:2008) in January 2008. Nonetheless, Adobe continues to enhance both the PDF specification and Acrobat.

A Peek at What Is Inside

I said that PostScript became one of the foundations of the portable document format. That’s true, as far as it goes; however a PDF file doesn’t contain actual PostScript code. Instead, it contains page-drawing instructions that are like PostScript instructions, but simplified and designed for efficient processing. PDF instructions manipulate the objects displayed on a page, which roughly fall into three types:

- **Graphic path objects:** These objects contain information about the lines, rectangles, and curves on a page, and how they are to be placed, drawn, and filled.

- **PDF image objects:** You can also think of these objects as *raster* images—a stream of pixels, in specific colors, at a specific resolution, presented in a specific rectangular area (the display on your computer screen is a raster image, even if the items depicted there started out as something else). The PDF image object is unique unto the PDF specification. When you make a PDF file by, say, saving a Web page to PDF in Safari, the images on that Web page are converted into PDF image objects.
- **Text objects:** These objects contain the text, font, and location information (and a number of other textual attributes) needed to represent text on a PDF page. The running text you see on a PDF page may consist of a lot of different text objects assembled together for viewing. These are just a stream of drawing instructions: Text objects don't include the concept of words, paragraphs, and so on; they contain only information about how they are supposed to look, where they are to be placed, and the characters that are to be drawn.

Objects and Imprints

Text, image, and graphic objects modified by or added to a PDF with PDFpen are called imprints, and they contain additional information which PDFpen employs to facilitate editing and positioning. The PDF specification allows PDFs to contain this program-specific extra information, which is, by convention, ignored by other PDF viewing and printing programs.

Holding it all together is a great big tree structure from which hang the individual pages (each containing a bunch of objects) and all the other information that is necessary to print or display the PDF document. It is up to the PDF rendering program (such as Preview, Acrobat Reader, Safari, or PDFpen) to work its way down the tree, assemble the objects and related information that belong to each page, and draw those objects on some device, such as a screen or a printer.

This is a simplified view, to be sure; there are all sorts of other objects, such as form elements and annotations, that a PDF can contain as well. Such objects can (and often do) contain one or more of the three basic

objects described here: a form object for a checkbox, for example, includes graphic path objects that describe its appearance.

On Having Realistic Expectations

As a quick look at the history of PDF and its internal structure reveals, PDF is not an editing format. PDF was designed to be a delivery format intended, ultimately, for the eyes of human readers.

Although the format has over time developed features that make machine parsing, analysis, and even editing more practical, PDF files are primarily intended to maintain their look across a wide range of devices: they are meant to be exact visual representations of printed pages, and almost everything about them is designed to make that representation more exact and efficient. Any information within the PDF specification that enhances editing was added as an afterthought and was not one of the original goals of the format's developers.

Here's a quick guide to some of the edits you can make within the limits of the format:

- **Touch up text:** You can make small text revisions, such as fixing typos. However, don't expect to add whole paragraphs within an existing text block (other than in PDFpen-created text imprints), or to move paragraphs seamlessly from one text block to another: the PDF specification doesn't include a definition for paragraphs. Also, keep in mind that a PDF may use fonts that you don't have on your Mac; this may affect the appearance of edited text. See [Add, Edit, and Remove Text](#) for more details.
- **Adjust images:** You can't edit the details of an existing image (which is stored in a special PDF image format), but you can move it around, crop it, and delete it. You can also adjust its colors, make portions of it transparent (great for scans of signatures), and straighten it. See [Add and Alter Pictures](#) for more.

Line Art Is Special

PDFpen doesn't support editing or repositioning of line art created outside of PDFpen. Such art is drawn on the page using the instructions within a graphic path object and does not lend itself to casual modification. Drawing imprints created within PDFpen contain extra information to support editing (similar to how PDFpen handles text imprints), so you can edit them.

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- **Annotate:** You can add notes, comments, and various graphic objects to mark up a PDF document. You can also highlight text with colors, underscores, strikethroughs, and squiggles. See [Take Notes on a PDF](#) and [Copyedit and Review a PDF](#).
- **Move pages around:** You can modify the order in which pages appear, as well as add or remove them. See [Create a PDF](#) and [Rearrange, Rotate, and Crop Pages](#) for more details.

From the foregoing you might think that PDF editing resembles Dr. Johnson's description of a dog walking on two legs: "It is not done well; but you are surprised to find it done at all." That's not really true: with a tool like PDFpen the dog can walk much more gracefully than you might expect: it might even dance for you.

Understand the Tools

PDFpen provides a rich assortment of tools for modifying PDF documents. Learning the tools you have at your command is one of the first steps of taking control of PDFpen. You can access many of these tools in a variety of ways: from a toolbar, from menus, and from the keyboard. Which method you use may depend on what is most convenient for you, or it may be a matter of personal preference.

The tools at your beck and call fall into these general categories:

- [The Selection Tools](#)
- [The Markup Tools](#)
- [The Drawing Tools](#)
- [The Form Creation Tools \(Pro Feature\)](#)

In addition to these tools, PDFpen provides an Inspector that you use to modify objects in a PDF, and a Library, where you can store graphics and text for reuse.

The following sections describe where you can find the tools, [The Inspector](#), and [The Library](#); they also briefly explain some of the circumstances in which you might want to find them.

Tip: You can find a number of commands at your fingertips with a Control-click, which produces a contextual menu offering various navigation and editing commands applicable to whatever you clicked.

Where to Find Tools

PDFpen has an Editing Bar that appears at the top of each document window. All of the PDFpen tools—the selection, drawing, markup, and form tools—are available from the Editing Bar (**Figure 1**). At the far left of the Editing Bar are the selection and highlight tools, which are always present. To their right is a segmented button that controls which set of tools appears to its right. The active tool set is always highlighted in this tool-selection button. For example, in **Figure 1** the markup tools are currently selected.



Figure 1: The Editing Bar at the top of a PDFpen document window provides selection and highlight tools at the far left, followed by a segmented button that controls which tools appear to its right. Here, the markup tools have been selected. The other choice in the segmented button is the drawing tools. In PDFpenPro, the button includes a third segment for the interactive form creation tools (not shown here). At the far right are the object property tools.

Tip: Hover your pointer over any tool in the Editing Bar to see a help tag appear that tells you what the tool is.

The tools are also available from PDFpen’s Tools menu, grouped as they are on the Editing Bar.


Notice the Keyboard Shortcuts

Even if you prefer to use the Editing Bar, note the Command-key equivalents of some of the tools on the Tools menu; these can come in handy.





For those tools that don’t have Command-key equivalents, you can create your own shortcuts in System Preferences: go to **Apple > System Preferences > Keyboard > Shortcuts > App Shortcuts** and click the plus **+** sign.

The Selection Tools


For brevity's sake, I'm calling the first group of tools in the Editing Bar "selection tools," even though not all of them select objects within a PDF. Here's what each selection tool does:

- **Select Text** : Use this tool to select runs of text within existing text blocks for correction or copying (such text blocks are to be distinguished from text imprints created within PDFpen, as described in [Objects and Imprints](#)). In some cases—such as when you have the Edit tool selected—PDFpen switches to the Select Text tool automatically when you click text within a PDF.

Note: The Select Text tool does not make the selected text editable by itself; you must choose to correct the text once it is selected in order to make changes (see [Add, Edit, and Remove Text](#)).

- **Edit** : Use this tool to select images, text imprints, or other objects you want to move, resize, or delete. Keep in mind that not all objects on a page can be selected. Generally, text objects and graphic path objects created by another program cannot be selected and moved within PDFpen: you can select only those text and graphic imprints that you have added with PDFpen. However, you *can* select, move, resize, and delete most PDF image objects within a PDF, whether or not you added them in PDFpen.
- **Highlight Text** : With this tool you can select text and highlight it with the current highlight color, which is visible in the Highlight control on the window's toolbar. Once the highlight is applied, the text remains selected, so you can copy and correct it as well (see [Take Notes on a PDF](#)). You can drag over non-text portions of a page with this tool to draw free-form highlight marks; your pointer becomes a highlight pointer  when it isn't over text.
- **Select Rectangle** : Use this tool to select a rectangular area on the currently displayed page. You can then copy this area and paste it on a page (as a graphic object), or you can crop the current page to the selected area.

The Markup Tools




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both the note icon and its window where you want. If you close the note window, you can click the note icon to re-open the window. Most PDF viewing programs, such as Preview, allow you to show or hide note icons and their windows, although they may look somewhat different than they do in PDFpen.

- **Comment** : Use this tool to make a comment text box. Comment boxes are visually indistinguishable from text imprints. Unlike text imprints, however, comment boxes don't contain rich text; they're restricted to a single font, size, and style. Comment boxes, also unlike text imprints, can be given borders, and have borders by default (that's why I call them comment *boxes*). Many PDF viewing programs allow you to hide or show comment boxes and move them around; text imprints, on the other hand, can't be hidden.
- **URL Link**  **and Page Link** : You use these tools to create transparent rectangular link objects that, when clicked, go to a Web location or to another page within the PDF (see [Create Links](#)). You can position and resize these objects. By default, they have no borders, though you can add them—and choose their colors and thickness—with [The Object Property Tools](#) at the right end of the Editing Bar.

Tip: It is a kindness to your PDF's readers to provide some sort of visual clue that a link is present, so consider providing your links with borders or some other indication that a link is present, such as colored text (like on Web pages) or a button-like icon.

The Drawing Tools

As I pointed out earlier in [Line Art Is Special](#), modifying standard PDF graphic path objects is currently beyond PDFpen's capabilities. However, you can use PDFpen's drawing tools to add new graphic objects to a PDF. PDFpen's graphic objects contain additional editing information so you can modify them in PDFpen, even though they appear and behave as regular graphic path objects in other PDF

viewers. You can use the Edit  tool to select, move, and resize graphic objects created by the drawing tools (see [The Selection Tools](#)).




PDFpen's drawing tools are similar to those in many other programs, and probably look familiar to you. Click the right side of PDFpen's tool-selection  button (in PDFpenPro, click the middle section of the  button) to reveal them in the Editing Bar (**Figure 2**). You can also choose any drawing tool from the Tools menu.



Figure 2: The PDFpen Editing Bar with the drawing tools visible.

Here are the kinds of graphic objects you can create in PDFpen:

- **Polygon** : Use this to create simple or complex objects made of connected line segments. Each click adds a line segment to the polygon (**Figure 3**); click the endpoint of a line segment to close the polygon.

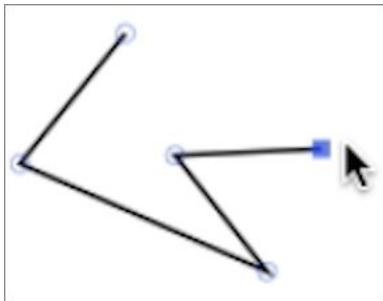






Figure 3: A polygon being drawn, segment by segment.

- **Rectangle** , **Oval** , and **Round-Edged Rectangle** : Click and drag with these tools to insert the respective shaped objects.
- **Line** : Drag with this tool to draw a line object.

Tip: You can adjust the line thickness, line color, line style, and fill color of any object made with the drawing tools (see [The Object Property Tools](#)). You can also specify the endpoint style of line objects; for example, you can place arrowheads at either end.

The Form Creation Tools (Pro Feature)


In PDFpenPro, click the right side of the Editing Bar's tool-selection  button to reveal the form creation tools (**Figure 4**). You use these tools to add interactive form elements to a PDF; see [Make an Interactive PDF Form \(Pro Feature\)](#), which describes how to set the elements' names, values, behaviors, and other characteristics. (You might also want to check out [Fill Out PDF Forms](#).)






Figure 4: Use PDFpenPro's form creation tools (shown in the Editing Bar at center) to make an interactive PDF form.

Select a form creation tool and then click on the page to create a form element at its default size; drag to create an element of custom size. You can also resize elements after you create them.





Form Elements and Compatibility

When viewed in PDF apps other than PDFpen and PDFpenPro, the appearance of the form elements will vary, and some PDF apps may not support all of the form elements that PDFpenPro can add. The PDF form specification leaves the appearance of form elements and support for them up to each PDF app's developer.

Here are the form creation tools PDFpenPro provides:

- **Text Field** : Use this to create a field into which the user can enter text. The default field includes a 1-point border, but you can set the border width, style, and stroke color with the object property tools (see [The Object Property Tools](#)).
- **Check Box** : You can add a checkbox and an associated label text imprint with this tool. The size and placement of both the box and its label are separately adjustable.
- **Radio Button** : Use this to make a radio button with an associated label text imprint. Radio buttons are never solitary, since they present a set of mutually exclusive choices, so if you add one, you

should add at least one more. All the buttons in a radio button group should share the same name but have different values, which you can set in the Form Element Properties tab of [The Inspector](#).

- **Choice** : Use this to create a drop-down menu element (on the Mac) with multiple menu choices. This element can look significantly different in apps other than PDFpen and on other platforms. So it goes.
- **List** : This tool inserts a list box, which contains a list of text items from which the user can choose. Depending on how you set the list's properties, a user can be restricted to a single choice, or can choose multiple items.
- **Signature Field** : Insert an interactive signature field with this tool. Users tap the field on a trackpad or touchscreen and then write their signatures by fingertip. The image of the signature is included with the form when it is submitted.
- **Submit Button** : Use this to create a Submit button, which, when clicked, submits form data either via email or to a Web app.

The Object Property Tools

The object property tools are the rightmost items in the Editing Bar (**Figure 5**).



Figure 5: The object property tools are three pop-up menus from which you can control the visual appearance of objects in a PDF.

From left to right, the object property tools control these properties:

- **Colors:** This menu allows you to specify the stroke color of a selected object (that is, the color of the lines that make up or enclose an object), the color of selected text, the color that fills the interior region of a graphic object, and the opacity of the object's stroke and fill (**Figure 6**). Click the selector at the top of the menu to choose

the color property you want to set; the available color properties depend on the type of object selected.

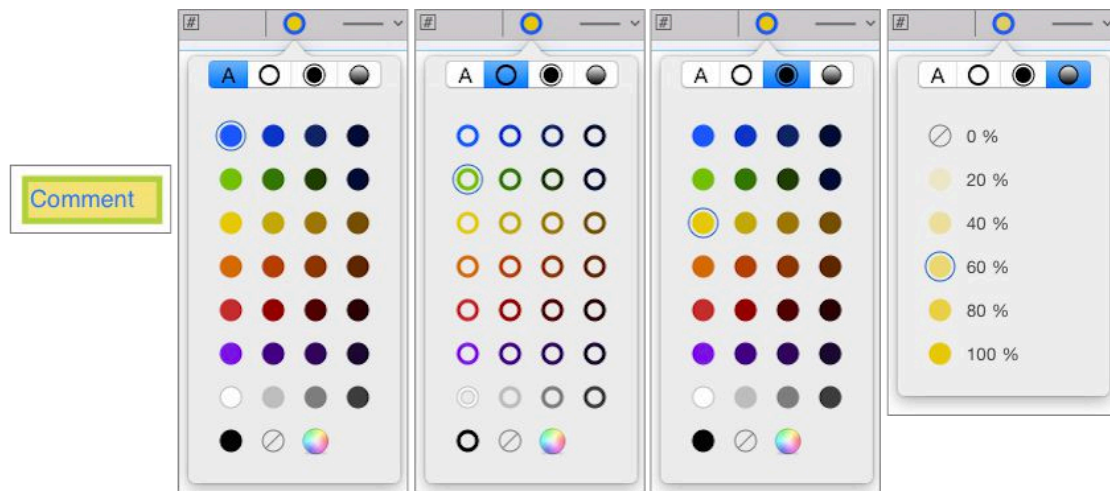


Figure 6: Shown from left to right are the settings for the text color, stroke color, fill color, and opacity of the comment box at far left.

- **Line attributes:** Use this tool to specify how the lines that make up or surround an object appear. For example, you can specify dotted or dashed lines for boxes and ellipses, or the kinds of end-points that appear on lines, such as arrowheads.
- **Stroke width:** Click this tool to choose the width of the lines that make up or surround a selected object.

See [Draw Attention](#) for more about using the object property tools.

PDFpenPro note: You can use the object property tools to control the appearance of form elements. However, different PDF viewing apps almost certainly will render your form elements differently than you specify, or completely ignore your customization choices.





The Inspector

The Inspector’s name understates its power: with it, you can do more than merely inspect things in a document—you can also change things.

To display the Inspector, choose **Window > Inspector** (Command-Option-I) or click the Inspector ⓘ icon in the document window’s

toolbar. You can also display any desired tab in the Inspector by choosing the tab's name from the Window menu.

The PDFpen Inspector contains the following tabs, from left to right:

- **Alignment**  **(Command-Option-1):** When two or more objects are selected, use this tab to align them horizontally or vertically, by their edges or by their centers. When three or more objects are selected, you can also distribute the distance between them evenly, both horizontally and vertically.
- **Form Element Properties**  **(PDFpenPro feature; Command-Option-2):** You can set the name, value, appearance, and behavior of a selected form element here. The active controls that appear in the tab vary depending on the form elements chosen.
- **Document Information**  **(Command-Option-3):** Use this tab to apply metadata to the document and to view additional data. You can specify the document's title (which is distinct from its filename), author, subject, and one or more keywords that apply to its content or purpose. You can see, but not change, the date and time the document was created, the date and time it was last modified, and the file and page size. You can also see both the name of the app and the producer of the PDF document (these are explained in the sidebar just ahead).
- **Document Permissions**  **(PDFpenPro feature; Command-Option-4):** You can specify a document password and enable or disable various document permissions on this tab. See [Protect Your PDFs \(Pro Feature\)](#) for more about document permissions.

Application? Producer? What?!

The distinction between Application and Producer in the Inspector's Document Information tab can be confusing, so here's an example.


Suppose you export a Pages document to PDF. When you view the PDF in PDFpen, the Inspector's Document Information tab shows the Application as "Pages" and the Producer as something like "Mac OS 10.10.1 Quartz PDFcontext" (this is the name of the underlying system software that generates PDFs from the Print dialog).

You can use this information to figure out the source of a PDF, which might be useful especially if the PDF has problems or visual oddities ("Dan, I see that you created the PDF you sent me with Acrobat 6 in Windows—maybe you should upgrade!").

By the way: Apple's Preview has an Inspector as well, and it uses the terms Content Creator and PDF Producer instead of Application and Producer. To-may-to, to-mah-to...

The Library

PDFpen's Library is like the junk drawer that all of us have somewhere in our homes. (What? *You* don't? What kind of person *are* you, anyway?) Like a junk drawer, the Library contains useful items that you may need from time to time.

To open the Library, choose Window > Library (Command-Y), or click Library  in the toolbar at the top of the document window.

The Library comes with some items already in it, but you can add your own, including graphic images, objects you draw with PDFpen's drawing tools, and text imprints. Unlike the typically chaotic junk drawer, however, the Library has separate collections for each type of object it contains (**Figure 7**).

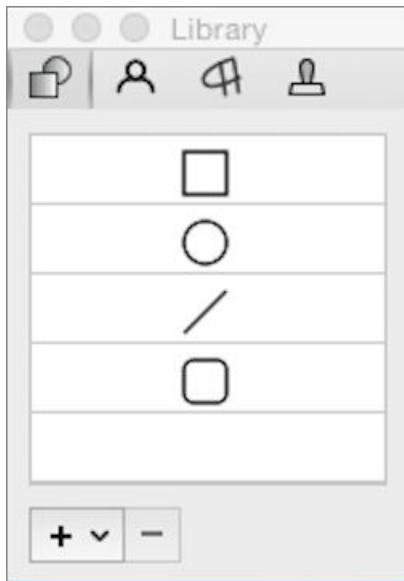






Figure 7: The Library window has separate collections for each kind of item: Built-ins, Custom, Proofreading Marks, and Stamps.

You access each of the collections by clicking its tab at the top of the Library window. Here's what each collection contains:



- **Built-ins** : This collection has the four standard drawing shapes you can create with the drawing tools. You cannot add items to this collection (if you could, they wouldn't be built-in, now would they?). Why use the built-ins? Sometimes, dragging an object from the Library to the PDF is faster than switching tools to draw it.
- **Custom** : This collection is for objects that you might want to place on a page in the future: text imprints, graphic objects made with the drawing tools, comments, and images. Anything you add to the Library goes into this collection.
- **Proofreading Marks** : This collection contains a large variety of proofreading marks. You cannot add items to this collection.
- **Stamps** : This collection contains various types of stamps and stickers used for business purposes. You can choose from three sets of stamps with the pop-up menu that appears below the collection:
 - ▶ **Standard Business:** These include stamps like “Confidential” and “Draft”.

- ▶ **Sign Here:** Use these to indicate where someone should sign or initial the PDF.
- ▶ **Dynamic:** These are similar to the Standard Business stamps, but they include your name, date, and time.


Note: You can set the name used in Dynamic stamps by editing the Name field in PDFpen's Editing preferences.


To use a Library item, drag it from the Library window to the page.

To add items to the Custom collection, do the following:

1. With the Edit  tool, select an item on a page in the PDF.
2. From the  pop-up menu at the lower left of the Library window, choose Add Selected Imprint.

PDFpen automatically puts the selected item in the Custom collection.

Tip: The Library's  pop-up menu contains another item: Add File. You can use this to select any graphic file on your Mac to add it to the Custom collection.

You can also remove any of the items you have added to the Custom collection: select it in the Library and click the minus  button. You can't remove any of the items in the other Library collections, but why would you want to?

Navigate a PDF Document

Some PDFs you encounter consist of just one page, such as an advertising flyer. Navigating those kinds of PDFs is simple, because there's really nowhere to navigate *to*.

But a PDF of, say, a software manual or a yearly financial report is another matter. PDFpen provides several ways to navigate a large document. This brief chapter shows you how to get around quickly so you can get on with your work.

Display Pages

Those of us who spend a lot of time on the Web have become comfortable with the idea of pages that contain endlessly flowing text. In the Web world, we expect everything to exist on a single page, and become annoyed when, for example, we read a news story that is “continued on page 2,” forcing us to click and wait for a page to load. How primitive! How 20th century!

But, unlike HTML, PDF was designed to replicate the physical, paginated world of books, magazines, pamphlets, and reports. Fundamental to the PDF specification (see [Learn about PDF Files](#)) is the concept that PDFs are composed of pages: rectangular areas on which text, images, and graphic objects are placed.

PDFpen provides several ways to arrange and view the pages in a PDF to suit your needs and personal proclivities.

Facing Pages

Although we tend to read one page at a time, it can be very helpful to see pages spread out, side by side (or “two-up”), the way they appear in books, such as in **Figure 8**. This is especially true with today's wide-screen, high-resolution monitors where there's room to see two pages

at a time clearly. It's also useful when you want to get a better idea of how a page design works in the context of other pages.

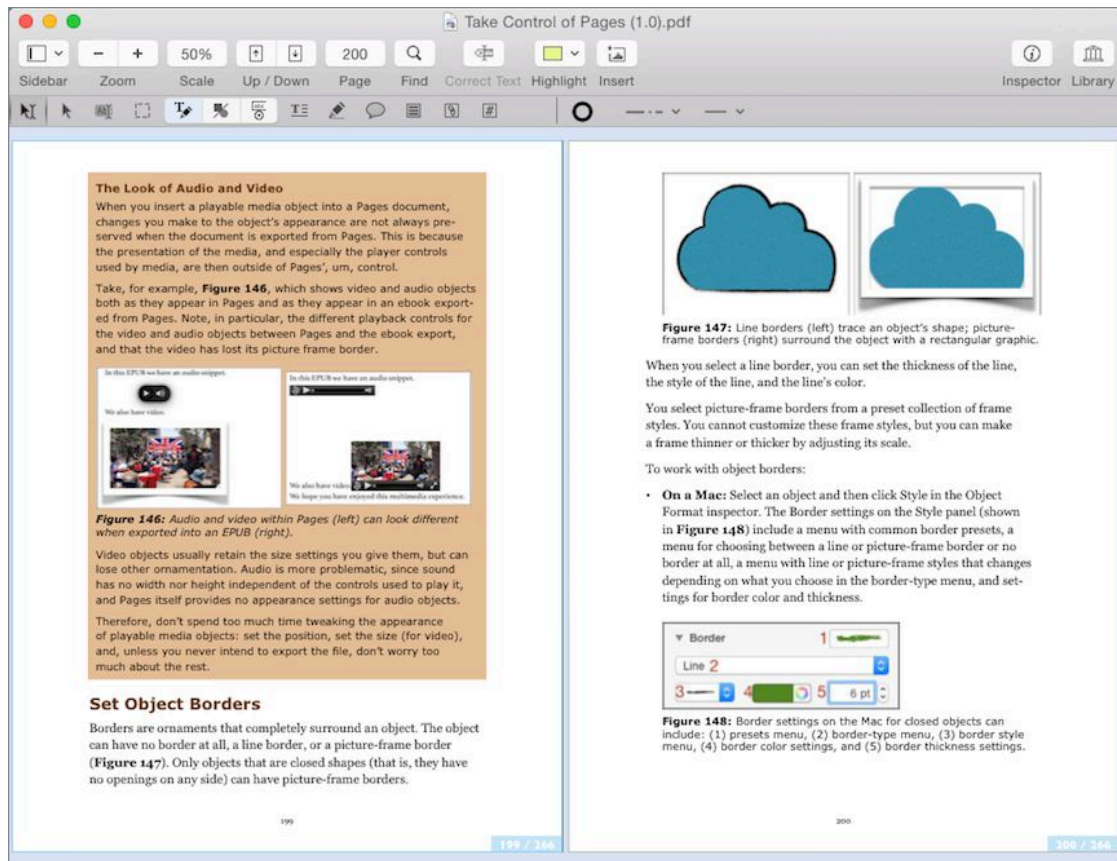



Figure 8: A PDF is displayed in a facing pages view.

There are two ways you can switch from single page view to facing pages view:

- Choose View > Facing Pages.
- In the toolbar, click Sidebar  , and then choose Facing Pages.

Facing Pages Preferences

Two PDFpen General preferences are associated with facing pages:

- ✦ You can set Default View to Single Page or to Facing Pages.
- ✦ You can set Facing Pages to Start with Cover (which shows the PDF's first page on its own as in a printed book) or to Start with 2-Page Spread (which begins the display with a two-page spread, as in **Figure 8**, above).

Tip: If you have a PDF in a language that ordinarily presents pages in right-to-left order, such as Japanese or Arabic, you can choose View > Pages Right-to-Left.

Magnifying Pages

Sometimes, such as when you want to select text set in very small type, it's useful to see a page in a magnified view. Other times, such as when you want a general overview of a page layout, you may want to zoom out so you can view an entire page, or even several pages, at once.

You can use the following commands on the View menu to set the magnification of the page view:

- **Actual Size (Command-Zero):** PDFpen obtains the pixel density of the Mac's display from OS X and uses that information to scale the document to its full size on screen.
- **Zoom In (Command-Plus):** This magnifies the view of the page by a small percentage, which varies depending on the current magnification. For example, at 100% magnification (actual size), this command increases the magnification to 110%. At 110% magnification, however, the same command increases it to 121%. In other words, the higher the current magnification, the larger the percentage of increased magnification the command delivers.
- **Zoom Out (Command-Hyphen):** This reduces the magnification by a percentage relative to the current magnification, much like the way that Zoom In works.
- **Zoom to Fit (Command-Option-Zero):** This adjusts the magnification so an entire page fits within the viewing area of the window. If you have facing pages displayed, the command adjusts the magnification so two pages fit in the viewing area.

Tip: If you have a trackpad, you can change the magnification using the pinch-in and pinch-out gestures.

A Matter of Scale

In PDFpen's General preferences you can choose what 100% scale (actual size) means (**Figure 9**).

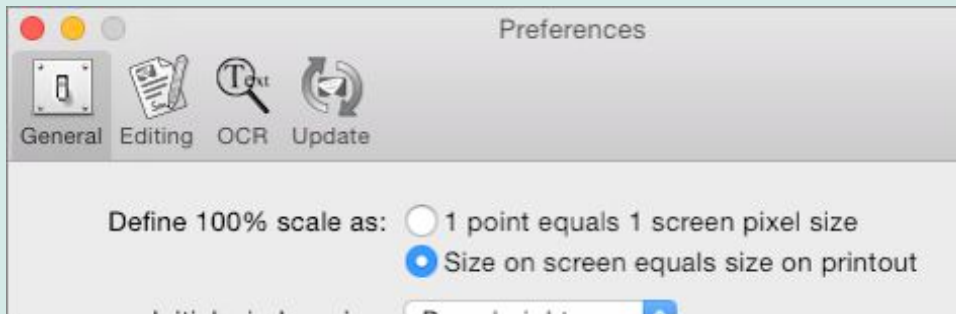


Figure 9: You can choose how PDFpen interprets "100% scale."

The first choice makes PDFpen pretend that the screen has a resolution of 72 DPI: on a high resolution screen, the PDF will look smaller at 100% scale than on a lower resolution screen. The second choice makes PDFpen take the screen resolution into account, so that something that is, say, one inch tall on the screen when magnified to 100% scale, will be one inch tall when printed.

Continuous vs. Non-continuous Page Display

PDFpen can display pages in a continuous stream, or restrict the viewing area to display just the current page (or set of facing pages) by itself. What's the difference? Mostly a matter of personal choice and how you want to focus your attention.

If you are reading a book in PDF form, you may not want to see a continuous page display so you can focus on just the current page. If you are browsing through the same book, though, the continuous view makes it easier to see where you are among the pages that make up the document. **Figure 10** shows a continuous page display.

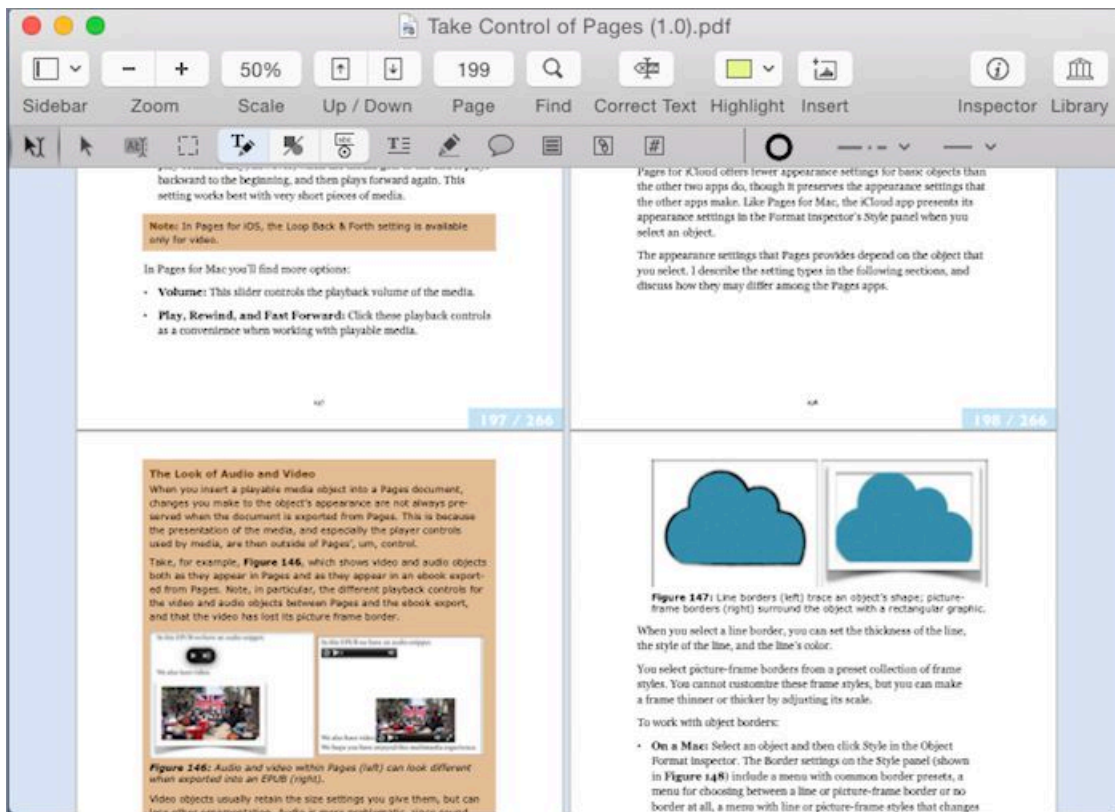


Figure 10: Continuous page display gives you an overview of where you are in the document.



You can enable or disable continuous page display by choosing View > Continuous; you can also choose Continuous from the Sidebar pop-up menu at the left of the document window's toolbar.

Navigate Pages

PDFpen gives you several different ways to move through a PDF document. How they work sometimes depends on whether you have enabled continuous page display (see the previous section).

Here are the ways to move from page to page:

- **Toolbar Up/Down controls** : Click these to scroll up and down either by the height of the document display area or by a complete page, depending on whether you are viewing the document with continuous page display enabled or not.

- **Page box on the toolbar:** To go to a specific page, select the page number displayed in the box and enter a new page number. PDFpen doesn't let you enter page numbers that don't exist in a document.
- **Go menu:** You have a number of navigation commands here:
 - ▶ **Next Page and Previous Page:** These work the same as the toolbar Up/Down controls  , described just above.
 - ▶ **Go to Page:** Like the toolbar's Page box, this presents a dialog where you enter the page number to which you want to go.
 - ▶ **First Page and Last Page:** These go, respectively, to the first page and last page in the document.
 - ▶ **Back and Forward:** You can choose Go > Back (Command-[) to retrace your most recent navigation moves, and Go > Forward (Command-]) to un-retrace them, much like the Back and Forward commands in a Web browser. (The keyboard shortcuts work exactly the same way in Apple's Preview app.) This feature is especially handy when you navigate using page links within a document (page links are described in [The Markup Tools](#)).
- **Gestures or scrollbar:** If continuous page display is enabled, you can use trackpad or mouse gestures to scroll quickly through a document; if you have scrollbars displayed on your Mac (set this in System Preferences > General), you can also use the scrollbar on the right to move through the document.

If continuous page display is disabled and the page is too large to fit in the document viewing area, gestures or the scrollbar only adjust the position of the current page in the document viewing area.

- **Keyboard:** Press the Page Up or Page Down key to move up or down by screen or page, depending on the continuous page display setting and whether the complete page fits within the document display area. On keyboards that lack these keys, such as laptop keyboards and the Apple wireless keyboard, Page Up is Fn-Up arrow and Page Down is Fn-Down arrow. Use the Home or End keys to go to the first or last page.

Tip: To help you find your place, choose View > Page Numbers to display a non-printing page number at the bottom right of each page (visible, for example, in **Figure 10**, a page or so back).

Navigate with the Sidebar

One of PDFpen's most valuable navigation tools is the sidebar, which you can display at the side of the document window, as shown in **Figure 11**.

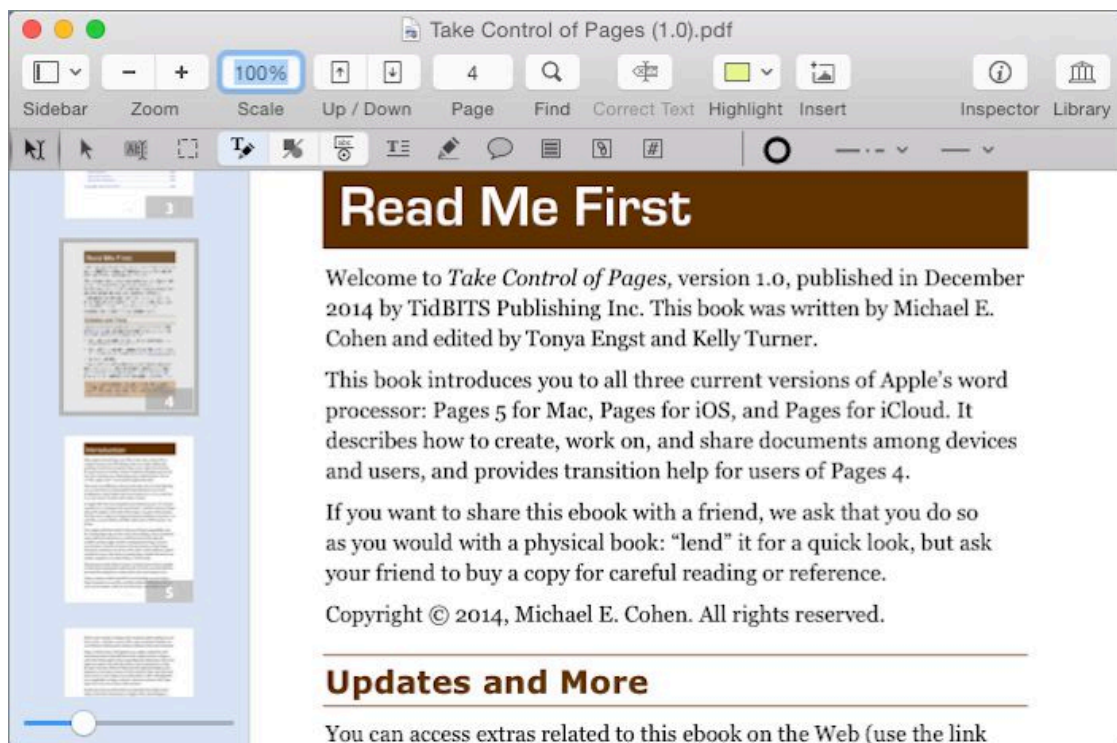



Figure 11: The sidebar, on the left of the window, can show page thumbnails, annotations, search results, or the table of contents. At the bottom of the Thumbnail sidebar shown here is the thumbnail magnification slider.

You can make the sidebar visible by choosing View > Show Sidebar (Command-Shift-D), or you can use the Sidebar pop-up menu on the document window's toolbar and choose a sidebar display option. The width of the sidebar is adjustable: position your pointer on the border between the sidebar and the document, and then, when the resize pointer  icon appears, drag left or right.

The sidebar display options available from the toolbar's Sidebar ▼ pop-up menu include hidden (no sidebar showing), page thumbnails, annotations, and the document's table of contents (if it has one). Note that these commands also appear on the menu bar's View menu.

Navigate with Thumbnails

Thumbnails provide miniature views of the pages in the PDF document. You can control the size of thumbnails to see more detail in them with the thumbnail magnification slider at the bottom of the sidebar. PDFpen can display multiple thumbnails side by side if the sidebar is wide enough and the thumbnails are small enough.

To use the thumbnails for navigation, click a thumbnail in the sidebar: the page that the thumbnail represents is displayed in the document viewing area of the window.

Tip: When a thumbnail is selected in the sidebar, you can use the keyboard's arrow keys to move from page to page.

Navigate with Annotations

You saw how to add notes, comments, and text imprints to a document in [The Markup Tools](#). The sidebar's Annotations display can list all of the notes, comments, text imprints, links, and highlights you've added to the document (**Figure 12**).



Figure 12: The Annotations sidebar with a selected highlight displayed.

You can click any entry in the Annotations sidebar to navigate to the page that contains the corresponding item. PDFpen also selects the item so you can immediately work on it. For example, if you click a

note entry, PDFpen displays the page that contains the note icon, and also opens the associated note window.

You can limit the kinds of annotations displayed in the sidebar by clicking the Show pop-up at the bottom of the Annotations sidebar and choosing a type of annotation to show or hide.

Navigate with a Table of Contents

Not all PDF documents contain a table of contents, but, for those that do (like all Take Control ebooks!), PDFpen's sidebar can display them.

PDFpenPro Note: You can also use the sidebar to create and modify a document's table of contents, as described later in [Make a PDF Table of Contents \(Pro Feature\)](#).

You can see part of the Table of Contents sidebar in **Figure 13**. The table of contents shown in the figure has several main entries that contain sub-entries; these appear indented below their main entry.




Figure 13: A table of contents in the sidebar can display sub-entries.

Click any entry or sub-entry to navigate to the associated page in the document.

If, as in **Figure 13**, a table of contents entry has sub-entries, you can hide or reveal them in the list by clicking the triangle ▼ beside the main entry.

Navigate with Search Results

In PDFpen, you perform text searches with the Find window. Click the Find  button in the toolbar, or choose Edit > Find > Find (Command-F) to display the Find window (**Figure 14**).

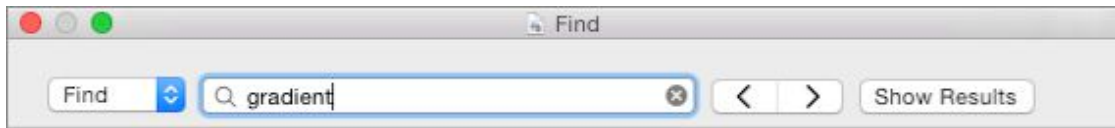


Figure 14: PDFpen has a separate Find window.

As soon as you begin typing in the window's search field, PDFpen begins searching and displays the first match beyond your current position in the document. Click the Show Results button to list each match with some surrounding context, arranged by page. Click any line in the list of results to display the page that contains the search term with the term selected (**Figure 15**).

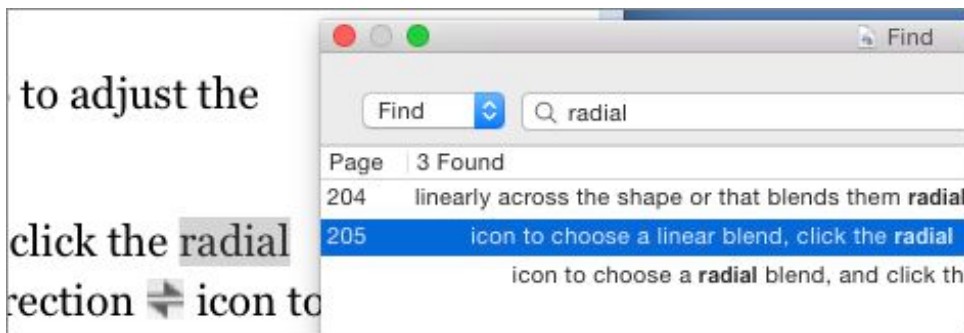




Figure 15: Click a search result to see the search term selected on the document page.

Once PDFpen has produced some search results (whether you choose to display them or not), you can navigate through the document using the next and previous   buttons in the Find window. You can also use commands on the Edit > Find submenu as follows:

- **Find Next (Command-G):** Choose this to jump forward to the next search result.
- **Find Previous (Command-Shift-G):** Jump back to the preceding search result.

- **Jump to Selection (Command-J):** This command displays the currently selected text within the PDF document, whether or not it is a search result, and it can be useful if you have been browsing through the document and want to get back to the page containing your most recent selection.

Tip: You can use these commands whether or not the Find window is currently displayed. So, if you hide the Find window to give yourself more screen space in which to work, you don't have to open it to navigate to other search results.

Search Based on the Selection

There is one more way to initiate a search: select some text in the PDF document, and then choose Edit > Find > Use Selection for Find (Command-E). This command also places the selected text in the Find window's search field and lists the results when the Find window is open.

Create a PDF

Chances are good that you have a bunch of PDFs scattered around your Mac's hard drive right now—and you can use PDFpen with any of them.

But real chefs cook up their own PDFs:

- If you're a complete do-it-yourselfer, you can make a PDF entirely from scratch (see below).
- If you prefer to work with prepared ingredients, you can make a PDF from anything your Mac can print. See [Print to PDF](#).
- If you like imported delicacies, you can [Import from Scans and Graphic Files](#) to make a new PDF, and even perform optical character recognition (OCR) on them.
- If you like to work with leftovers, you can make a new PDF from the bits and pieces of other PDFs you have hanging around. Read [Combine Existing PDFs](#).
- Or, if you like to order take-out, you can go online and convert Web pages into PDFs. See [Make PDFs from HTML \(Pro Feature\)](#).

And, when you're done cooking, you can write up the menu...er... [Make a PDF Table of Contents \(Pro Feature\)](#).

Make PDFs from Scratch

It's easy enough to make a completely empty PDF with no pages. This isn't as daft as it sounds. You want to do this when you need to specify the page dimensions and orientation of a new PDF.

Here are the steps for making a pageless PDF:

1. Choose File > New > Blank Document.

PDFpen creates a completely empty PDF.

2. Choose File > Page Setup (Command-Shift-P) and then, in the Page Setup dialog, specify the page dimensions and orientation that you want your PDF to have.
3. Choose Edit > Insert Blank Page (Command-Option-B).

The new blank page matches the initial Page Setup settings.

If the default page dimensions (set them in System Preferences > Printers & Scanners) are what you want, though, you can create a PDF that contains a single page with those dimensions in a single step: choose File > New > One Page Document (Command-N).

With blank page in hand (virtually), you can now populate your PDF with text imprints, drawings, and images. [The Markup Tools](#) and [The Drawing Tools](#) explain how to add text imprints and drawings, but you can also drag text, drawings, and images from most other programs directly onto a PDFpen page.

Note: PDFpen may convert text dragged from some programs, such as from older versions of Microsoft Word, into a graphic image when you drop it on a PDFpen page.

By the way, there's yet another way to create a PDF from scratch—well, almost from scratch: use a page from an existing PDF as your model:


1. Open a PDF that has a page you want to use as the model for your new PDF.
2. Select that page in the Thumbnail sidebar (if you need help, read [Navigate with Thumbnails](#)), and then choose File > New > From Selection (Command-Shift-N).

PDFpen creates a new, untitled PDF with the selected page as its only page. Now customize it to your heart's content.

Tip: You can also drag one or more selected page thumbnails to the Finder to create a new PDF containing those pages.

One More Thing...

There's a variation on the last-mentioned method of creating a PDF from an existing page: you can make a PDF from *part* of a page:

1. With the Select Rectangle  tool, drag to create a rectangle around the area that you want to use as your model.
2. Choose File > New > From Selection (Command-Shift-N).

Voilà! A new PDF appears with a single appropriately sized page containing the contents of the rectangle you selected.

Print to PDF

It's no secret that you can save a document as a PDF in the standard Print dialog. It's an easy way to create a PDF on which you can then work in PDFpen. Use this technique to turn a document created in another program, such as a report or manuscript, into a PDF.

Here's how to create a PDF from almost any application on your Mac:

1. Choose File > Print.
2. In the lower-left corner of the Print dialog, click PDF, and then choose Save as PDF from the pop-up menu (**Figure 16**).

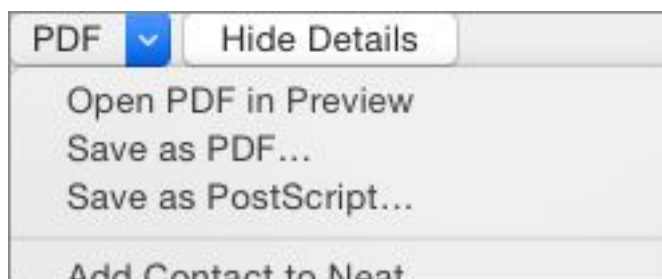


Figure 16: You can create a PDF document with the Print dialog's PDF pop-up menu.

3. In the Save dialog, give the document a name, choose where to save it, optionally specify PDF metadata and security options, and then click Save.

Note: The PDF metadata includes the document name, the author, the document's subject, and keywords associated with the document (if you read about the Document Information tab in [The Inspector](#), these metadata items should be familiar to you).

Once you have the PDF, it's easy enough to open it with PDFpen and make any changes and enhancements you require. But what if you want to save a document as a PDF and work on it *immediately* in PDFpen? Simple: Smile provides two PDF workflows—Open with PDFpen and Open with PDFpenPro—that you can [download and install](#) in the Print dialog's PDF menu. Once that's done, you can choose the appropriate workflow from the PDF menu to save the document as a PDF and open it in PDFpen or PDFpenPro.

Import from Scans and Graphic Files

PDFpen can scan documents and create PDFs from the scans. It can also create PDFs from graphic files. If you have printed copy or graphic files that you need to make into PDFs, use the techniques in this section.

You don't have to forgo PDFpen's text editing capabilities just because the PDFs you make with these techniques start out as graphic images: PDFpen can recognize text in the images and perform optical character recognition (OCR) to make the text editable.

Use a Scanner to Make a PDF

PDFpen supports any scanner that the Mac's Image Capture software recognizes.

When you scan a document with PDFpen, the program creates a new PDF document. You can save the resulting document as a separate PDF, or add its pages to an existing PDF—or do both.

You use PDFpen's scanning capabilities as follows:

1. Choose File > Import from Scanner.

A Scan window appears (**Figure 17**).

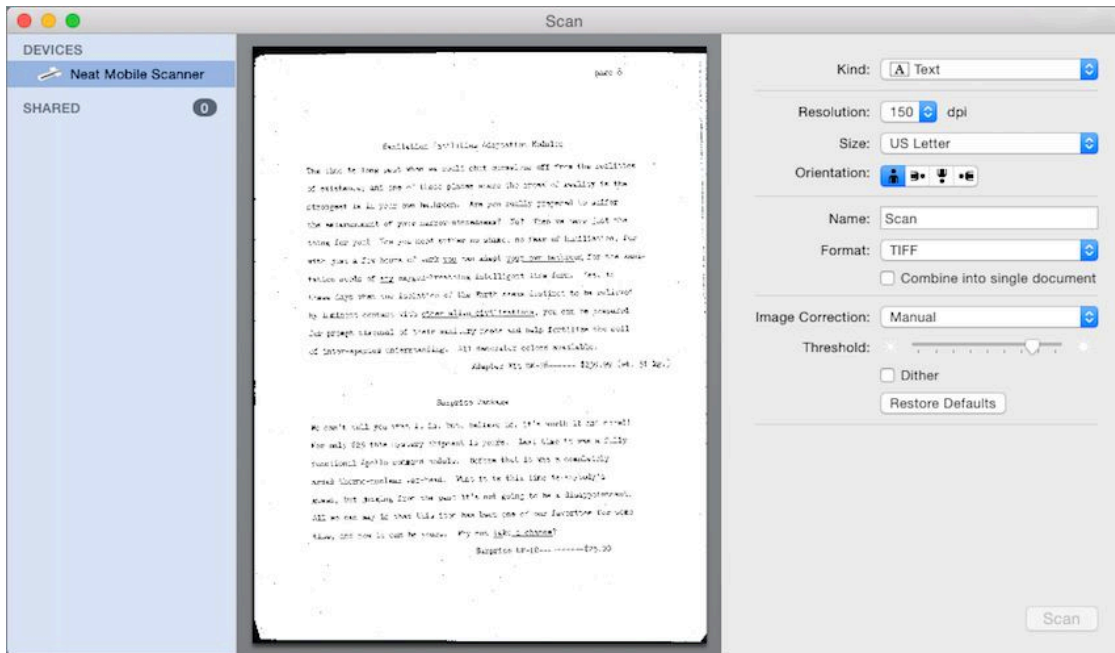


Figure 17: The Scan window has several scanner-specific options.

2. Near the top-right of the Scan window, click the Kind pop-up menu and choose the kind of scan:
 - ▶ **Text:** This choice scans the document in 1-bit black and white, which is suitable for text-only documents.
 - ▶ **Black & White:** Sometimes known as grayscale, this choice, depending on the scanner, may offer several grayscale options with various levels of gray. This choice is suitable for documents that combine text with black-and-white photos or diagrams.
 - ▶ **Color:** This is best for documents that contain color images. There can be several color choices available, depending on your scanner's capabilities.
3. Choose a resolution from the Resolution pop-up menu.

The higher the resolution, the more detail the scan contains, but the larger the file is. The resolution you choose depends on how the PDF is to be used; for viewing online, 150 to 300 dpi is more than adequate, but if the PDF is to be printed the scan resolution should match the printer's resolution.

4. Choose a scan format from the Format pop-up menu.

The scan format determines the kind of image encoding in the PDF, and it affects the file size: for text-only documents, TIFF is a good choice; for photos, JPEG provides good results; otherwise, choose PDF.

5. Set any other scan options you require, and then click Scan.

A new PDFpen document opens containing the scanned page. The Scan window remains open so you can perform additional scans to add to the document.

6. When you have finished scanning, close the Scan window.

More Help with the Scan Options

The PDFpen Help has an excellent summary of the scanning options and their uses in the “Scanning a Document” topic, and it’s well worth consulting. The same Help topic is also available on [Smile’s site](#).

Open Graphic Files as PDFs

You can also create new PDFs directly from graphic files, such as JPEG, TIFF, or GIF files. Turning a graphic file into a PDF file is simple:

1. Choose File > Open to display the Open dialog.
2. Select a graphic file and click Open.

PDFpen creates a new PDF document with a single page that contains the graphic.

Use OCR on Scans and Graphic Files

When PDFpen creates a scanned document, or when it opens a graphic file as a PDF, it can perform OCR on it to make the text editable. It’s useful to make text editable even if you don’t intend to edit it. Editable text can be searched (see [Navigate with Search Results](#)), and it can be highlighted (see [Highlight Text](#)).

To instruct PDFpen to perform OCR on a scanned document, choose Edit > OCR Page.

If Your OCR Page Menu Item Is Disabled

If PDFpen doesn't detect a full-page graphic on the page, it disables the Edit > OCR Page menu item. That said, if a page has an image that contains text, you can hold down Command when you choose the Edit menu to enable the OCR Page menu item.

Bonus tip: Hold down both Command and Option to display an OCR Document command on the Edit menu.

You can set PDFpen to perform OCR automatically upon opening a scanned document, or when you make a selection on a scanned page that appears to contain text. You turn on these settings in the OCR pane of the PDFpen preferences (**Figure 18**).

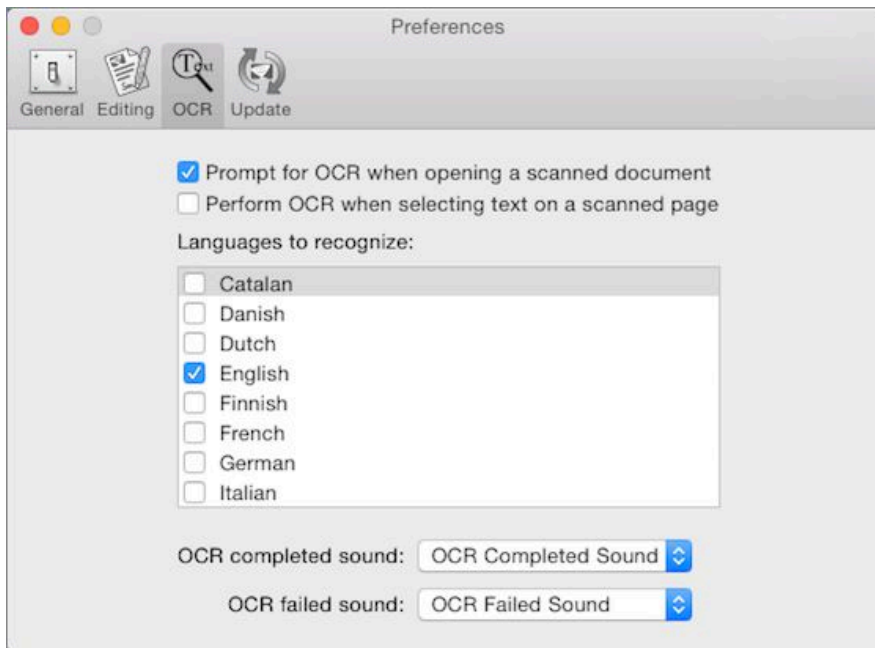


Figure 18: Set how and when PDFpen performs OCR with PDFpen's OCR preferences.

When you create a PDF from a graphic file and you've set PDFpen's preferences to prompt for OCR when opening a scanned document, the program presents a dialog asking if you want OCR performed (**Figure 19**).



Figure 19: When PDFpen detects a full-page image, it may present this dialog, depending upon the OCR preference settings.

About OCR Accuracy and the OCR Layer

In my experience, PDFpen provides very good character recognition, even from documents that appear problematic. Nonetheless, you should check the results. Even 99.9% accuracy means there could be one mistake every 1,000 characters, which, if you think about it, means that mistakes are still likely. When OCR has been completed, the PDF's appearance doesn't change. You can view the OCR results by choosing View > OCR Layer (Command-Shift-O), as in **Figure 20**.

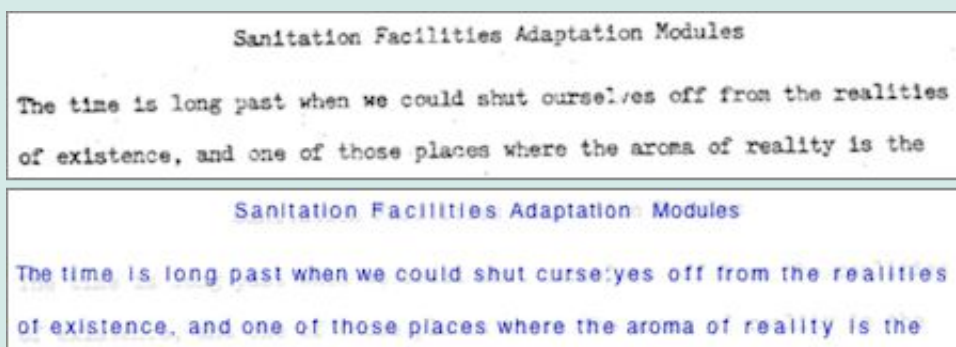


Figure 20: The first image above shows the scanned text as it appears in the PDF; below it is the OCR layer.

You can correct OCR'd text with PDFpen's Correct Text tool; such corrections modify the appearance of the scan by creating a text imprint (see [Add, Edit, and Remove Text](#), later). PDFpenPro, however, provides the additional capability of making corrections directly in the OCR layer without creating a text imprint and changing the scan's appearance (see [Edit the OCR Layer in PDFpenPro](#)).

Combine Existing PDFs

Combining pages from multiple PDFs is a matter of drag and drop between documents. If you have separate PDF files that contain pages you wish to use in another PDF, this technique is what you want.

Here's how to create a new PDF from one or more existing PDFs:

1. Create a new, empty PDF document (see [Make PDFs from Scratch](#)).
2. Choose File > Open or File > Open Recent to open one or more existing PDF documents.
3. Show the Thumbnail sidebar in all open document windows (described in [Navigate with the Sidebar](#)).
4. Drag one or more thumbnails from the sidebar of an open document to the empty document area of the blank document.

You don't have to start with a blank PDF file as shown in the steps above, of course: you can drag pages from any PDF into the Thumbnail sidebar of any other PDF with PDFpen (**Figure 21**).

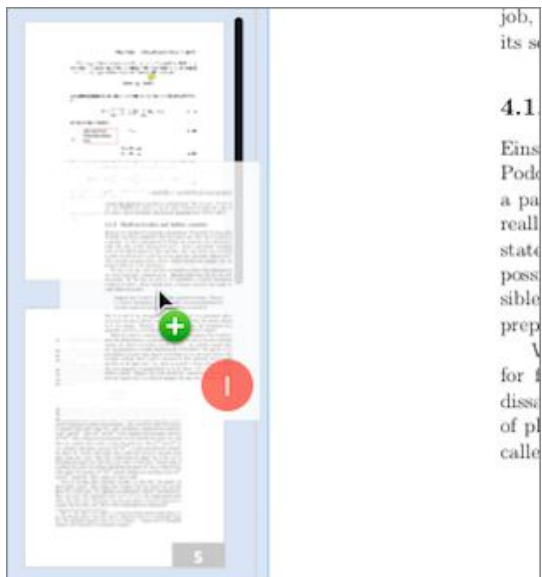


Figure 21: Add pages by dropping their thumbnails in a document's Thumbnail sidebar. The dragged thumbnails have a red badge that indicates how many pages are being added; a black bar in the sidebar shows after which page the added pages will be inserted.

You needn't drag pages one by one: you can Shift-click or Command-click to select multiple page thumbnails from the sidebar and then drag them all at once. Or you can add a PDF's entire contents to a document by dragging that PDF into the Thumbnail sidebar from the Finder. You can use one or more of the supplied AppleScripts to combine PDFs (see [Appendix A: The PDFpen AppleScripts](#)).

Make PDFs from HTML (Pro Feature)

If there is a Web site that you want in PDF form, you can always use the [Print to PDF](#) technique described earlier. However, that requires that you print each page on the site separately, which will quickly become tedious. PDFpenPro, on the other hand, can follow the links on a Web page and add the linked pages to a PDF:

1. Choose File > New > From HTML.

The New From HTML dialog appears (**Figure 22**).

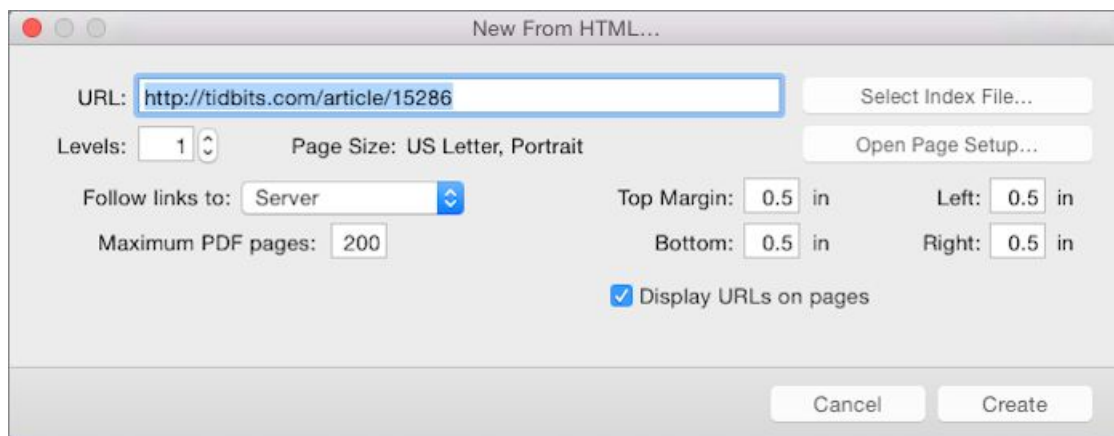


Figure 22: You can create a PDF from one or more Web pages.

2. Do one of the following, depending on whether the Web site is located on the Internet or stored locally:
 - ▶ **On the Internet:** Enter the URL of the Web page that is the starting point for the PDF.
 - ▶ **Stored locally:** Click Select Index File and then, from the standard file dialog that appears, navigate to the starting page.

3. In the Levels field, enter how many levels of links to include.

A setting of 1 produces a PDF from the page that you've specified but doesn't follow any links to produce more pages. A setting of 2 follows each link on the first Web page and produces PDF pages from those linked Web pages. A setting of 3, as you might expect, follows links on the linked Web pages to produce more PDF pages, and so on. In theory, you could include almost every page linked on the Internet in a single PDF by choosing a high enough level number—if your Mac didn't run out of memory or melt first.

4. Choose an item from the Follow Links To pop-up menu:

- ▶ **Subtree:** This choice restricts the followed links to those that lead to pages within the same directory hierarchy as the Web page's URL. For example, if the starting URL is <http://www.example.com/dir1/index.html>, then the linked pages <http://www.example.com/dir1/somepage.html> and <http://www.example.com/dir1/dir2/apage.html> would be included in the PDF, but a linked page at <http://www.example.com/dir3/apage.html> would not, because it's not in the same directory as the starting URL.
- ▶ **Server:** This choice restricts the followed links to those that lead to pages on the same server as the Web page's URL. For example, if <http://www.example.com/dir1/index.html> is the URL for the first page in the PDF, the linked page <http://www.example.com/dir2/apage.html> would be included in the PDF, but a linked page at <http://www.smilessoftware.com/> would not.
- ▶ **Any:** This choice allows PDFpenPro to follow links to any directory or site and include those pages in the PDF.

5. Optionally, specify the maximum number of pages to include in the PDF. This is useful for preventing your Mac from being tied up for hours when you accidentally ask PDFpenPro to turn the entire Google index into a PDF.

6. Optionally, set the margins for the pages that will be created.

7. Optionally, click Open Page Setup, and set the dimensions and orientation of the pages to be created.
8. Click Create, and stand back as PDFpenPro does its magic.

Before you know it (depending on the speed of your Internet connection and the complexity of the pages involved), you'll have a PDF version of a Web site.

Make a PDF Table of Contents (Pro Feature)

Not every PDF needs a table of contents, but if you have a PDF that is more than a few pages long, providing a table of contents is a courtesy to your readers. In PDFpen and PDFpenPro, as with Apple's Preview, you view a PDF's table of contents in the document window's sidebar (see [Navigate with the Sidebar](#)).

In PDFpenPro, you can also *edit* a PDF's table of contents. With the table of contents displayed (choose View > Table of Contents or select it from the Sidebar pop-up menu), use the action menu at the bottom of the sidebar (**Figure 23**) to fine-tune the document's table of contents.




Figure 23: Use PDFpenPro's Table of Contents action menu to edit a document's table of contents.

Note: The same menu items appear on the Edit > Table of Contents submenu in PDFpenPro.

To add a table of contents entry, do the following:


1. Choose View > Table of Contents.

This command has the virtue of both displaying the sidebar if it is hidden and showing the table of contents in one step.

2. Go to a page that has a heading or content that you want to include in the table of contents, and then, with the Edit  tool, click anywhere on that page.
3. On the Table of Contents action menu, choose Add Entry.

PDFpenPro puts the new entry in the table of contents, and names the entry *Page #* where # is the number of the currently displayed page. The entry name is selected so you can easily change it.

You can also add entries hierarchically: Add Aunt adds an entry one level above the current level (unless you are at the top level already); Add Child adds an entry nested within the current one.

Tip: If you select text on the page with the Select Text  tool before you choose Add Entry, the selected text becomes the entry name.

Here's how to rename a table of contents entry:

1. In the sidebar, double-click the entry.
2. Type the new name and then press Return.

As you work on a PDF, you may find yourself rearranging the order of the pages (see [Rearrange Pages](#)). In such cases, you may find it necessary to reorganize the Table of Contents. You can arrange the order in which entries appear, remove entries, and nest entries hierarchically. This last capability is useful for structured documents that have headings and subheadings (much like this book, in fact); see [Navigate with a Table of Contents](#) for an example of nested entries.

Here are the methods by which you organize a table of contents:

- **Change where an entry appears:** Drag the entry up or down the table of contents to the desired position.

As you drag, a translucent image of the entry follows your pointer, and a line appears to show you where the entry will be placed when you release the mouse (**Figure 24**).

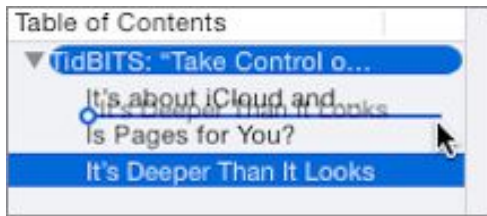


Figure 24: Drag to reposition a table of contents entry.

- **Delete an entry:** Click the entry to select it and then press Delete. You can also click it and then choose Remove Entry from the Table of Contents action menu.
- **Nest or un-nest an entry:** While dragging an entry you can control whether it is nested under another entry—pay attention to the location of the blue line and drag directly onto another item to nest the entry under it. Or you can do one of the following:
 - ▶ To nest an entry beneath the entry above it, click the entry and then choose Demote from the Table of Contents action menu.
 - ▶ To un-nest an entry, click the entry and then choose Promote from the Table of Contents action menu.

Take Notes on a PDF

People (especially students) love to write in books, scribble in the margins, put sticky notes on pages to flag them, use highlighter pens to call attention to important passages, draw circles and arrows to connect margin notes to text, and generally make a glorious mess of things as they attempt to comprehend the contents of their books.


As you already saw in [The Markup Tools](#), PDFpen has an assortment of tools you can use to perform similar actions on the contents of a PDF.

In this chapter, you'll see how to take notes for a research paper by using these tools to mark up PDFs.

Highlight Text


It is a rare student who doesn't use a highlighter pen to mark up text. Highlights draw attention without obscuring the text. In fact, many students color-code their highlights: a student might use yellow for important facts, blue for quotable passages, and so on. PDFpen has four standard colors for highlighting, as well as a fifth, customizable color. You can also highlight text with three kinds of lines.

Highlight in Color

As you learned in [The Selection Tools](#), you use the Highlight Text  tool to select text and simultaneously apply the current highlight color. The current highlight color is both displayed in, and selectable from, the Highlight pop-up menu in the document window's toolbar.

Here's one way to highlight text:

1. Choose Tools > Highlight Text Tool.
2. In the document window toolbar, from the Highlight pop-up menu, choose a highlight color.
3. Select some text in the PDF.

The selected text takes on the chosen highlight color. Every additional selection you make with the Highlight Text  tool applies the chosen highlight color.



However, you don't need to use the Highlight Text  tool to highlight text. Instead, you can use a keyboard shortcut. This is how I prefer to highlight text, because I don't have to switch to the Highlight Text  tool. To apply a highlight color to selected text, type Command-Shift-Option-(a number from 1 to 5). You can see the highlighting keyboard shortcuts by choosing the Format > Highlight submenu, a piece of which is shown in **Figure 25**.




Figure 25: The Format > Highlight submenu shows the keyboard shortcuts for applying a highlight to the currently selected text.


Remove a Highlight

Obviously, being able to remove highlights is important. Aside from aesthetic considerations, when a page has too many highlights it's hard to know which highlights are *really* important. Besides, even the best of us make mistakes and highlight a passage in error.

Here's how to remove a highlight:

1. With the Select Text  tool, select any portion of the highlighted text you want to remove. You don't have to select the entire highlighted passage; any portion will do.
2. From the Highlight pop-up menu in the toolbar, choose Remove.

The entire highlight is removed.

Tip: I prefer to remove highlights with a keyboard shortcut: I select a bit of the highlighted text with the Select Text  tool and then type Command-Shift-Option-Zero. (The Remove command with that shortcut appears on the Format > Highlight submenu.)

Set a Custom Highlight Color

If the four standard highlight colors don't appeal to you, you can specify a custom highlight color. This color is set in the PDFpen Editing preferences and, once set, is available in all documents you subsequently open.

Note: If you change the custom highlight color, any text highlights that use the former custom color retain that color.

Here's how to set the custom highlight color:

1. Choose PDFpen > Preferences > Editing.
2. Near the bottom of the Editing pane, click the Custom Highlight Color swatch.
3. In the Colors panel that appears, select a color.

PDFpen applies a 40% opacity to the chosen color, regardless of the Opacity slider setting in the Colors panel.

Tip: Changes to the Custom Highlight Color take immediate effect, so you can try various settings without closing the Preferences window.

Underline Passages

If the five different highlight colors aren't enough to suit your needs, you can also mark text with various kinds of lines, although these are usually used for copy-edit purposes (read [Copyedit and Review a PDF](#)).

Like highlight colors, the line highlights are available from the toolbar's Highlight pop-up menu. The highlight lines appear in indigo, as shown in **Figure 26**.

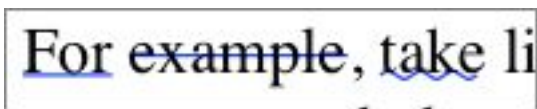


Figure 26: You can use three kinds of lines to highlight text.

Here are the three kinds of line highlights available to you:

- **Underline:** This is a simple text underline. If the PDF contains underlined text (using underlines to indicate italics is a standard manuscript convention), you probably want to avoid using it. Otherwise, an underline is a subtle way to highlight a passage that's not as obvious as a colored highlight. You can underline selected text by typing Command-Shift-Option-6.
- **Strikethrough:** This draws a line through, rather than under, the text. Strikethroughs are often used to mark passages for deletion, and are, therefore, not a very good choice for highlighting text. You can type Command-Shift-Option-7 to strike through selected text.
- **Squiggle:** This draws a wavy line under the selected text, and is useful for highlighting purposes, although the squiggle underline is often used to indicate passages that should be set in bold type. Command-Shift-Option-8 is the keyboard shortcut for applying a squiggle underline to selected text.

Add Commentary

When you think about it, highlights provide a secret coded commentary to a PDF: *you* may know what the different highlight colors you've used mean, but everyone else has to guess. You can, however, add textual commentary that anyone can understand.

PDFpen has two different tools for adding textual commentary to a PDF: the Note tool and the Comment tool.

Add Pop-up Notes

Notes are useful for when you have a large amount of commentary to add: the note window can be closed to remove clutter, and opened by clicking the note icon. When you reopen a note window, it retains the shape and position it had when you last closed it.

A note comes in two parts: a small, balloon-shaped icon that you can position on the page, and a note window (**Figure 27**).

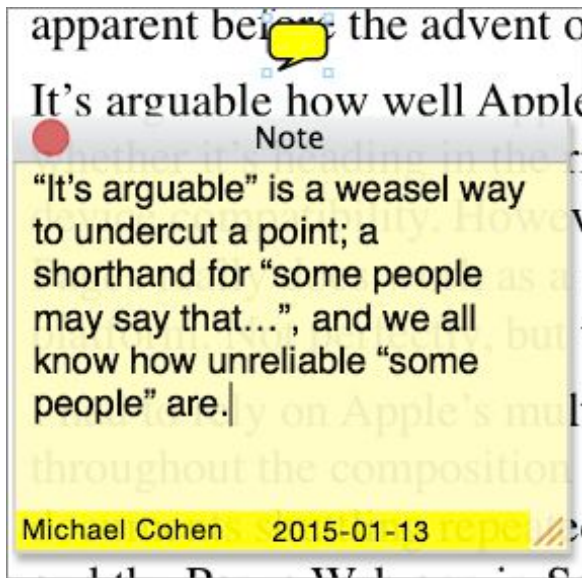





Figure 27: A note consists of an icon and its associated window.

Notes are also useful when more than one person is commenting on the PDF. As you can see in **Figure 27**, above, the note window contains the name of the person who added it, and the date that the note was added. You can choose whether or not to show a name, and specify the name to use, in PDFpen's Editing preferences.

Tip: You can change the color of the note icon by selecting the note and changing the fill color with [The Object Property Tools](#).

To add a note to a page, do the following:

1. In the Editing Bar, click the markup tools  segment of the tool-selection button, and then click the Note  tool.
2. Click on the page where you wish the icon to go.
You can drag the icon wherever you like with the Edit  tool.
3. In the note window, type your note (or paste it from the Clipboard), and adjust the window's size and location as desired.
4. Optionally, close the note window; if you need to reopen it, click the note icon.

Tip: Consider placing the note icons near the left or right margins of text objects instead of over the text itself. This makes them more visible, and avoids obstructing the text. Also, try to position the note windows so they don't obstruct the information to which they refer.

Add Comment Boxes




When you need to add short commentary that always remains visible on the page, add a comment box (**Figure 28**).



Figure 28: A comment box always stays on the page.

Comment boxes use the default font (set in PDFpen's Editing preferences), and, by default, are black with a thin border. However, you can set the color and border thickness with the Editing Bar's object property tools (see [The Object Property Tools](#)), as demonstrated by the blue comment box shown in **Figure 28**, just previously.

To add a comment to a PDF page, do the following:

1. In the Editing Bar, click the markup tools  segment of the tool-selection button, and then click the Comment  tool.
2. Click on the page to add a comment box at the default size, or click and drag to create a comment box with a custom size and shape.
3. Select the text within the box (the default text is "Text"), and type your comment.
4. Optionally, choose the Edit  tool, and reposition or resize the comment.

Tip: Remember that you can quickly review all the comments, notes, and text imprints you've added to the PDF, and go to each one, by using the Annotations sidebar (see [Navigate with Annotations](#)).

Print Notes and Comments

When you print a PDF, you have control over whether the notes and comments print. **Figure 29** shows the relevant portion of PDFpen's Print dialog; you may have to click Show Details in the dialog to see it.

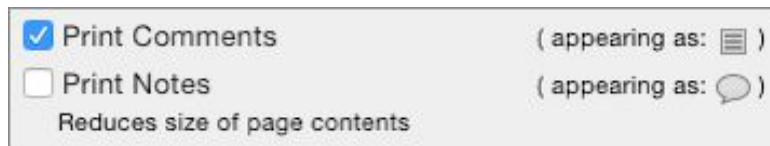



Figure 29: You can control whether notes or comments print using these options on the Print dialog.

Here's what the options do:

- **Print Comments:** Select this to have the comments print in the exact location where you placed them on the page. By default, the option is unchecked.
- **Print Notes:** Select this to have the note window contents print at the bottom of the page as numbered footnotes. PDFpen reduces the page size so that the notes fit, and it adds a note number to each note icon on the page. This option is unchecked by default.

Note: When you print, any other markup you've added to a PDF—squiggles, highlights, underlines, text imprints, and so on—does print, no matter what.

Draw Attention

Sometimes you need to call attention to an item. For example, you can draw an arrow from a comment box to point at a particular part of a graphic, or call out part of an image or line of text with one of the drawing shapes (see [The Drawing Tools](#)) or the Highlight  tool.

You can easily create elaborate eye-catching graphics with PDFpen's drawing and object property tools. For example, **Figure 30** shows a portion of a musical score that I've highlighted by superimposing a rounded rectangle, which has a custom fill color (yellow at 25% opacity) and a custom stroke (green, with a 2-point width).

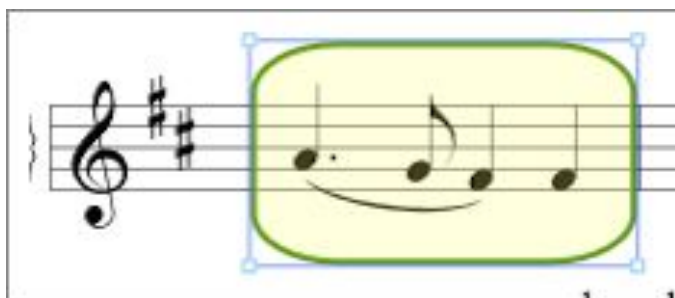


Figure 30: Draw attention to important information with the drawing and object property tools. The drawn object shown here is selected, showing its bounding box with control points at the corners.

And since I've been nattering on about the object property tools, **Figure 31** shows them in the Editing Bar:

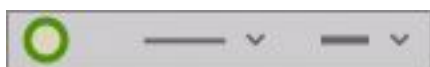




Figure 31: The object property tools control how an object's fill and stroke appear; from left to right they control fill and stroke colors, line attributes, and stroke width.

Each tool is a pop-up menu that changes appearance to show its current setting, as described earlier in [The Object Property Tools](#).

Note: Each drawing tool retains the object property settings you made the last time you used that tool.

With the Edit  tool you can select and drag drawn objects around, and resize and reshape them by dragging the edges of their bounding boxes or their control points.

Should you wish to use a drawn object again, you can copy and paste it, and add it to your Library (see [The Library](#)).

Another way to draw attention is with the Highlight  tool. Though the tool is normally used to highlight text, as described earlier in [The Selection Tools](#), when you position the tool over a non-text portion of the page, you can draw freeform highlights in the current highlight color (**Figure 32**). Note, however, that freeform highlights are locked in place when you draw them; to unlock them so you can select and delete them, choose Arrange > Unlock All.

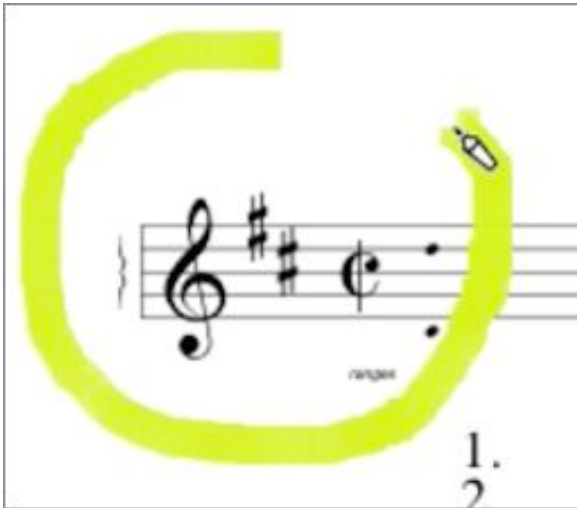


Figure 32: You can draw freeform highlights.

Copyedit and Review a PDF

When you take notes on a PDF, the notes are usually intended for you and you alone. Copyedit notes and review notes, by contrast, are intended to be read by someone else: usually a writer, collaborator, or editor.

That's not to say that the techniques used to copyedit and review a PDF are different from those you use when you take notes. In fact, many of the techniques are the same: what differs are the audience for the notes and the purpose of the notes.

So, take note: before you read the following brief section, I urge you to read [Take Notes on a PDF](#).

Learn about Copyediting

In today's modern society today (as a poorly written student paper I once received said), writers and editors seldom exchange printed copy marked up with handwritten notes and queries. Instead, they often exchange PDFs.

The advantages of speed and cost are obvious: shipping a 500-page set of *galley proofs* (an unbound preliminary printed version) can take days and cost many dollars compared to the few minutes and few pennies that emailing a PDF of the same material might involve.

There are disadvantages to the digital method, of course: it's more pleasant to sit in a comfy lawn chair on a mild summer day with a red pencil and a stack of galleys and mark things up than it is to hunker down at a desk in a stuffy office, wrestling with mouse and keyboard. But those digitally imposed discomforts have begun to dwindle as technology advances: with a lightweight laptop or a tablet, a copy of PDFpen, and maybe a Long Island Iced Tea, the act of digital copyediting can be almost as enjoyable as the traditional manual method.

What Is Copyediting?

Copyediting is the act of marking up a text to make suggestions for improving its style, format, and accuracy. Although it's often separate from a proofreading pass over the text, where typographical errors are corrected, it is just as often combined with proofreading (although, in those cases, a second proofreading pass usually occurs following the initial copyedit/proofing pass).

In this section, I treat the proofreading and copyedit stages of manuscript preparation as combined.

Use the Proofing Marks

Most copyeditors use a standard set of proofing marks, and follow certain conventions in their use. The goals are these:

- Indicate where there are problems in the document.
- Indicate the type of each problem.
- Indicate what to do to fix each problem.
- Make those indications as visible as possible.
- Take up as little of the page's limited space as possible when doing all of these things.

Each textual problem usually has two marks associated with it: a small mark that is placed within the text and an associated mark that is placed next to the line in the margin.

The purpose of the margin marks is to alert you to the problem, its general location, and its type. The purpose of the mark in the text is to show exactly where the problem is and to help indicate the solution.

Figure 33 shows a copyedited page with proofreading marks; notice how much easier it is to spot the margin marks than those in the text.

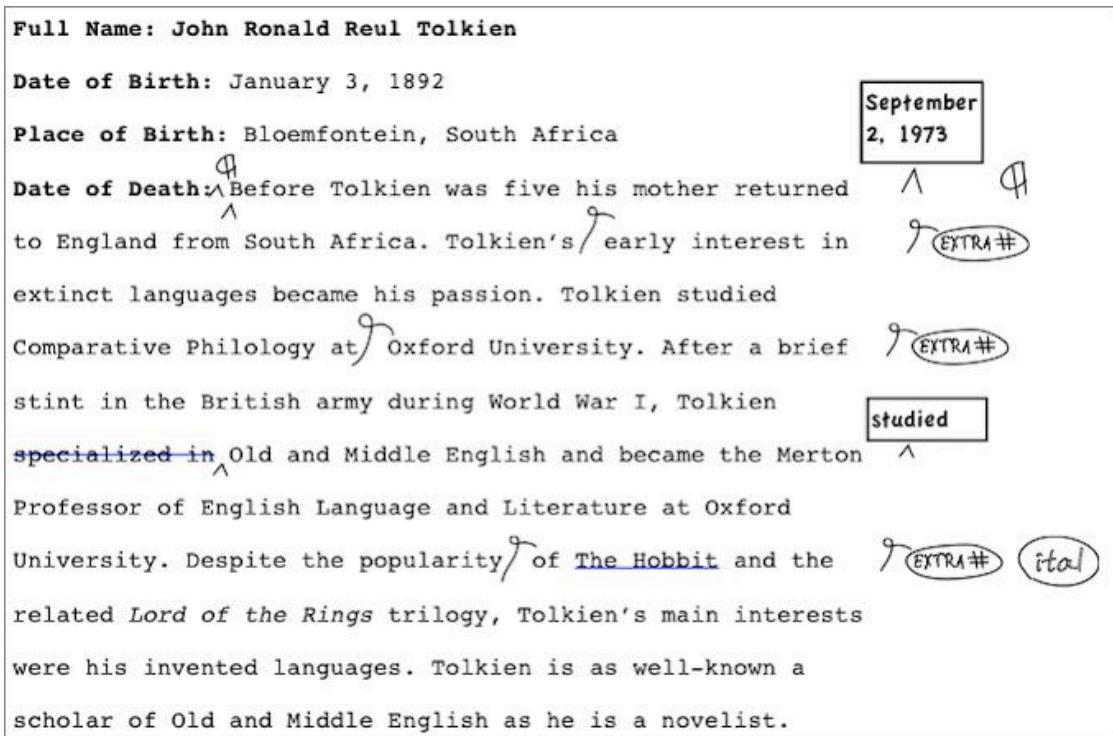


Figure 33: Proofreading marks indicate insertions, deletions, and format changes.

Tip: You can see an extensive list of proofreading marks with examples of their use in context on this page at [EEI Communications](#).

PDFpen's Library has a rich assortment of proofreading marks. You can use these marks when you edit a text.

To access PDFpen's proofreading marks, do the following:




1. Choose Window > Library or click Library in the document window toolbar.
2. In the Library window, click the Proofreading Marks  tab (**Figure 34**).



Figure 34: The Library has an extensive collection of proofreading marks; the names of some are available when you hover the pointer over them.

When you want to add a mark to a page, drag it from the Library to the page with the Edit  tool. When it's on the page, you can adjust its size if necessary by dragging the mark's handles with the Edit  tool.

Most of the proofreading marks in the Library have three forms, as you can see in **Figure 34**, above. From left to right the forms are:

- **Editing marks:** You place these in the text itself when you copyedit a draft document. Drafts are commonly double-spaced (as in **Figure 33**, above) and have more room for markup. Therefore, editing marks tend to be slightly larger than proofreading marks (described next).
- **Proofreading marks:** You place these in the text itself during a final proofreading pass. These marks tend to require less space than editing marks, and space is at a premium for material that is typeset in (nearly) final form.
- **Margin marks:** You place these in the margin to call attention to the editing or proofreading marks that you've placed in text. Not all editing or proofreading marks have margin mark equivalents.

Note: Generally, you should use either the editing marks or the proofreading marks in a document and not mix the two—although the proofreading police won't arrest you if you do.

Learn the Copyediting Best Practices

While I'm not about to teach you all of the fine points of copyediting (folks, there are whole books about this stuff!), here's a short list of best practices that cover some basics:

- Use the editing/proofreading marks within the text to indicate requested changes and corrections, and place the associated margin marks in the margin.
- When adding text, place a comment box containing the text above an insertion mark in the margin, and use an insertion mark within the text to mark the new text's location (**Figure 33**, above, shows several examples).
- Use a deletion mark in the margin to indicate deletions, and use the Strikethrough line highlight in the text to indicate deletions of more than one character; for a single character deletion, use a deletion mark in the text instead of a strikethrough line.
- Use the Underline highlight to indicate italics within the text, and a margin mark to indicate it in the margin.
- Use the Squiggle line highlight to indicate bold within the text, and a margin mark to indicate it in the margin.
- Use comment boxes in the margin to indicate brief suggestions, but make them a different color than any comment boxes used for inserted text.
- Place note icons in the margin for queries to the writer or the editor; write the query in the note window, and make sure to close the window when you finish writing.

Learn about Review Practices

PDFs are commonly used when circulating a document for review. Reviews can have a number of purposes:

- To solicit opinions and suggestions from colleagues (for example, a draft document on a proposed business method)
- To evaluate whether a document should be published (for example, peer review of papers submitted to academic journals)
- To verify a document's accuracy (for example, recipes in a cookbook or procedures in software documentation)

There are no special tools designed specifically for document reviews. Rather, the tools and techniques described in [Take Notes on a PDF](#)—highlights, notes, comments, and drawings—can be, and often are, all used in reviews. What differs, as I've said, is the audience for and the purpose of the notes.

Choose How to Circulate a Document

How you circulate a document for review depends on the number of people involved, the need for confidentiality, and the schedule. There are two common circulation methods:

- **Star review:** Copies of the document are sent from the editor to all reviewers at once (like the rays emanating from a star). Each reviewer supplies her own notes and returns the copy to the editor. This method is quick, and ensures that each reviewer's notes are confidential, since only the reviewer and editor see them. However, a star review requires more work on the editor's part to integrate the notes and suggestions, and can result in many redundant notes.
- **Round-robin review:** The document is sent to each reviewer in sequence, accruing notes as it circulates. This allows later reviewers to see the notes of previous reviewers and can eliminate redundant notes. However, a round-robin review takes more time than the star method, since only one reviewer at a time works on the document.

It might also lead to instances of “false consensus” if later reviewers are influenced or intimidated by notes from earlier reviews.

Follow Best Review Practices

Finally, here are some best practices to follow when participating in a review:

- **Be polite:** Even if the review is confidential, there is no guarantee that the author might not see your notes, even if your name isn't associated with them. Rants and derogatory terms are never appropriate.
- **Question or suggest, don't dictate:** This goes along with being polite—unless you are the editor, you don't have final say (and most good editors tend to question or suggest rather than wield the Awesome Hammer of Authority).
- **Be brief:** Even if a note window with a scroll bar gives you ample room to expand upon your thoughts, be succinct. The editor and the writer both have to deal with comments from many reviewers, and, as a manuscript nears completion, time is usually a precious commodity.
- **Stay on topic:** Don't get sidetracked by copyediting or proofreading issues; that's usually not what a review is for. Focus on the issues on which the editor or author has asked you to comment.

Which leads to this last best practice....

- **(For the review organizer) Give clear instructions:** Let the reviewers know what they should be concentrating on as they review the document, and let them know what they can ignore. If you have specific requirements for the form of the comments (for example, use notes rather than comment boxes, recommended highlight colors), state them explicitly. Make sure that all reviewers know the date by which the review must be completed.

Fill Out PDF Forms

You live in a world of forms. Forms for filing taxes. Forms for ordering goods. Forms for applying for jobs. Forms for supplying medical information. Forms for ordering more forms.

Often, forms come to you as PDFs, whether downloaded from the Web or arriving as email attachments. And, if you're really Old School, you can print those forms out and then fill them in by hand.


But you don't have to be Old School: with PDFpen, filling out a PDF form is a piece of cake, no printing required. You can even add a digital scan of your signature directly to the PDF.

So whether you have an interactive PDF form that lets you fill it out onscreen, or a PDF containing a digital image of a classic printed form, PDFpen has the tools that you need to make quick work of it.

Fill Out an Interactive Form

Since version 1.2 of the PDF standard back in the last century, PDFs have been able to include interactive form elements. Filling out such a form is so easy to do with PDFpen that it's hardly worth mentioning (but, of course, I will—I'm here for *you*).

Most interactive PDF forms look indistinguishable from their non-interactive counterparts. This raises the question: how can you tell if a PDF form is interactive?

Here's how: With the Select Text  tool, click a form element, such as a text entry area or a checkbox. When you click an interactive text area, PDFpen outlines it with a blue box and places your cursor in the box so you can type your information directly into the form (**Figure 35**). If you click a checkbox on an interactive form, PDFpen places a check mark in the box for you; click it again to remove the check mark.

Print or type Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name Harrison Bergeron
	2 Business name/disregarded entity name, if different Vonnegut Enterprises
	3 Check appropriate box for federal tax classification: <input checked="" type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification Note. For a single-member LLC that is disregarded, the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶
	5 Address (number, street, and apt. or suite no.) 1313 Mockingbird Lane
	6 City, state, and ZIP code

Figure 35: You can fill out an interactive form with PDFpen.

As I said, easy.

You may be allowed to return a form by email as a normal attachment. Other interactive forms might need to be printed when you finish filling them out, and then physically sent to the recipient by mail, fax, or some other method.

Tip: Many interactive forms include instructions for how to fill them out and submit them. You can save yourself some time and trouble if you first look for, and read, any such instructions before you attempt to fill it out.

You may encounter interactive forms that take advantage of an Internet connection, and that can submit the form information directly over the Internet (you can design such forms with PDFpenPro; see [Make an Interactive PDF Form \(Pro Feature\)](#)). Forms that send their information over the Internet normally have a Submit button, or a button with a similar label, that you click when you've completed the form.

The form may also have a Clear or Reset button that you can click to clear all of your entries if you need to start over. If it doesn't, you can choose Edit > Reset Form.

Note: Not all PDF apps support sending form information over the Internet. For example, PDFpen does; Apple's Preview app doesn't.

Fill Out a Non-interactive Form

Filling out non-interactive PDF forms is more work than interactive forms—but not much more. With few exceptions, non-interactive forms only have two kinds of form element with which you need to deal: checkboxes and text entries.


Fill Out a Text Entry

The key to filling out a text entry on a non-interactive PDF is to put a text imprint over the text entry area (**Figure 36**).



Figure 36: Place a text imprint over a text entry area in a non-interactive PDF form.

It only takes a couple of steps to create a text imprint and fill it out:


1. With the Text  tool, drag out a text imprint that fits over a text entry area on the PDF.

The default text in the imprint is selected automatically when you create the imprint.

Tip: Click to create an imprint if the text entry area is a single line. See [Set Wrapping in a Text Imprint](#).


2. Type your entry.

Your text appears in PDFpen’s default font.

Tip: If PDFpen switches to another tool after you create an imprint, you can double-click the Text  tool to keep it selected so you can quickly create additional text imprints on the form.

Unless you have changed it, the default font in PDFpen is 12-point Helvetica. If this font is impractical (for example, the text area on the form is too small to accommodate a 12-point font), you can change the imprint's font and font size.

To change a text imprint's font and font size, do the following:

1. If the Fonts panel is not already visible, choose Format > Font > Show Fonts (Command-T).
2. With the Edit  tool, select the text imprint.
3. In the Fonts panel, click a font in the Family column, and then click a size in the Size column.

The text imprint takes on the font, style, and size you have chosen.

Tip: You can use the Fonts panel's search field to find a font quickly, and you can type a font size directly into the Size field at the top of the Size column.

The above steps for changing the font are fine if you have only a few text areas to fill out, but they can quickly become cumbersome if the form has a lot of text entries. In that case, you can change PDFpen's default font, as follows:

1. Choose PDFpen > Preferences > Editing.
2. Near the top right of the Editing preference pane, click Select to display the Fonts panel (**Figure 37**).



Figure 37: Set PDFpen’s default font in the Editing preferences.

3. In the Fonts panel, select a new default Family and Size.



If you wish, you can select a new default Typeface style as well.

4. (Optional) Close the Fonts panel and the Preferences window.

Preference changes take effect immediately, so you don’t have to close the Preferences window. You may want to leave the window open so you can reset the default font when you finish filling out the form.

Tip: If you’d rather not change the default font in PDFpen, you can also create a text imprint, customize its font, and then Option-drag it to place an identically formatted copy elsewhere on the form. Or consider adding a properly formatted text imprint to your Library (see [The Library](#)).

Fill Out a Checkbox

There are several ways to fill out a checkbox in a non-interactive form. For example, you could put a small text imprint over the checkbox and type an X or √ (Option-V in many fonts), use the Scribble  tool to hand-draw a check mark, or use the Polygon  tool to make a check


mark. Remember that once you've placed a check mark, you can Option-drag it to a new location to place a copy there.

Personally, I like to use the Library, because it comes with a ready-made check mark in the Proofreading Marks collection (**Figure 38**).



Figure 38: Steal a check mark from the Library's Proofreading Marks collection to check off boxes in a form.

Follow these steps to use the Library to fill out checkboxes:

1. Choose Window > Library or click Library in the document window's toolbar, and then, in the Library window, click the Proofreading Marks  tab.
2. Scroll down to find the check mark. It's about two-thirds of the way down in the collection.
3. For each checkbox that you want to check, drag the check mark from the Library window to the checkbox on the form.

Add a Scanned Signature

Ordinarily, when a non-interactive PDF form requires a signature, you can fill out the form with PDFpen, print it, and sign the printed copy. Sometimes, though, the party that sent you the form may allow you to send a PDF of a signed form back via email. If so, you can add a signature to a PDF form within PDFpen and avoid the printing step.

Warning! A signature image, like any other image in a PDF, can easily be copied and reused. Make sure you send PDFs containing images of your signature only to trusted parties. Of course, a scoundrel receiving your signature on paper could scan it too, so it's not as though avoiding a digital format is a guarantee of safety.

Figure 39 shows an example of a signature imprint placed in a PDF.

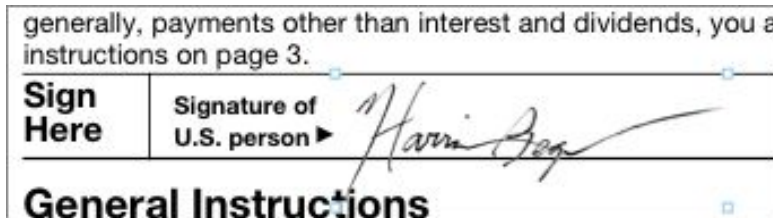


Figure 39: Sign a PDF form with a signature image.

The general steps are these:

1. Obtain an image of your signature. This can be from a scan, a digital photo, or from some other source like a drawing program.
2. Place the image on the form in PDFpen (see [Add and Alter Pictures](#)).
3. Crop and resize the image to fit (see [Resize and Crop an Image](#)).
4. Make the image transparent so only the pen-strokes are visible (read [Make a Transparent Image](#)). This makes your signature sit on top of a horizontal line, making it look like you wrote over the line.
5. Optionally, save the transparent signature in [The Library](#) so you can reuse it in other forms.

Tip: The PDFpen Help also has extensive instructions for all these steps; see "Adding Signatures" in PDFpen's Help, or see the [Web version](#).

Tip: If you need to print your form entries on a pre-printed form, use the Print Imprints Only option in the Print dialog; see [Print Your PDFs](#).

Edit a PDF

The conventional wisdom is that PDF documents are great to share because, unlike word processing files, PDFs are in final form and can't be modified.


Yeah, right. If you've read any part of this book, you know that PDFs are far from unmodifiable. Nonetheless, it is true that PDFs are not *easily* modifiable—that is, not unless you have a tool like PDFpen. Armed with PDFpen, you can make all sorts of changes, such as:


- Fix typos in a magazine article.
- Update an old flyer, even if you don't have the original.
- Sharpen and stylize pictures on the page.
- Redact sensitive or confidential material.
- Crop pages or rotate them.
- Create links to other pages in the PDF or to Web pages.

In this chapter, you'll learn how to do all of these things and more.

Warning! When you edit a PDF, never edit the original. Make a copy and edit that. Trust me, you'll thank me for saying this.


Add, Edit, and Remove Text

You've already seen how to add a text imprint to a PDF in [Fill Out a Text Entry](#): select the Text  tool and click or drag on a page in the PDF. Each time you create an imprint, it contains the sample text, "Text," which is selected so you can quickly replace it by typing.


Tip: To duplicate an imprint, Option-drag it with the Edit  tool.

Set Wrapping in a Text Imprint


Whether text wraps in an imprint depends initially on whether you created the imprint by clicking or by dragging:

- **Clicking:** When you click with the Text  tool to make an imprint, the text box expands horizontally as you type. The text doesn't wrap, so you may find yourself typing a long line of text that extends beyond the edge of the page. Similarly, if you paste a lengthy chunk of text into the imprint, the text ends up on a single line.

You can change this behavior by enabling text wrapping before the text imprint becomes too wide. When text wrapping is enabled, typed text wraps when it reaches the right border of the box. To turn on text wrapping, do the following:

1. Place the cursor within the imprint, or select the imprint with the Edit  tool.
 2. Choose Edit > Wrap Text.
- **Dragging:** When you drag to create an imprint, the text that you subsequently type wraps automatically to the width of the imprint, and the imprint expands vertically once the text reaches the bottom. This is because the Wrap Text command is enabled for imprints that you create by dragging. If you choose Edit > Wrap Text on such an imprint, Wrap Text is disabled, and the text imprint behaves like one that was created by clicking.

Whether the text wraps or not, you can adjust the size of a text imprint:

1. Choose the Edit  tool and click the imprint.
2. Drag a handle at a corner of the imprint to resize and reshape it.

When Non-wrapping Imprints Wrap

When you resize a non-wrapping imprint, the text does wrap, but as soon as you attempt to add text to the imprint, it unwraps again, and can leave you with a short, wide, and possibly unwieldy imprint. Always remember to turn on wrapping as soon as you resize a non-wrapping imprint to avoid an unpleasant surprise.

Tip: Click to create an imprint when you know its text needs to be on a single line. Drag to create an imprint if you know the text has to fit within a specific horizontal space.





Change the Appearance of Text

A newly created text imprint uses PDFpen's current default font (described in [Fill Out a Text Entry](#)). But the text imprint doesn't have to remain in that font. In fact, you can mix fonts and text colors within an imprint, and you can set the font, text color, and background color for the imprint as a whole.

Note: By "font" I mean the font family, typeface, and size, as chosen in the Fonts panel.

By default, imprints are transparent, but you can give them a background color. You can make an imprint's background color completely opaque, or you can adjust the color's opacity so that objects behind the imprint can be seen.

Here's how you change the background color of an imprint:

1. With the Edit  tool, click to select the imprint.
2. In the Editing Bar, click the Colors property  tool, click the Background Color  tool at the top of the pop-up menu, and then click the Other Colors  button at the bottom of the menu.
3. In the Colors panel that appears, choose a color and, optionally, adjust the color's opacity with the Opacity slider.

Note: You cannot give a range of selected text a background color; the background color always affects the entire imprint.

You can set the formatting for a range of selected text in an imprint or for the imprint as a whole.

Here are the text formatting settings you can make:

- **Text styles and relative sizes:** Choose Format > Font and an appropriate submenu item. The submenu items include Bold, Italic, Underline, Smaller, Larger, Kern, Ligature, and Baseline. Note that you can set kerning, ligature, and baseline only for text selections, not for a selected imprint.
- **Text alignment:** Choose Format > Text, and then choose either Align Left, Center, Justify, or Align Right.
- **A specific font (family, typeface, and size):** Choose Format > Font > Show Fonts, and then specify a font with the Fonts panel.
- **Text color:** Choose Format > Show Colors, and then choose a color in the Colors panel.

Tip: Also see the sidebar, [A Wise and Benevolent Ruler](#) (a few pages ahead), for another way to perform text layout tasks. Some of these tasks, such as setting line spacing and paragraph indents, are available only from the ruler.

Here are explanations of the less common formatting terms:

- **Kern:** The commands on this submenu control the amount of space between individual characters. Here are your choices:
 - ▶ **Tighten and Loosen:** These two commands, respectively, bring the characters closer together or send them farther apart. Place the cursor between two characters to adjust the kerning between them, or select a range of text to adjust the kerning for the entire selection.
 - ▶ **Use Default:** Select this to use the kerning pairs built into the font. The available kerning pairs vary from font to font.
 - ▶ **Use None:** Choose this to ignore the default kerning pairs and space the characters equally.

Ordinarily, Use Default is the best choice unless you have specific typography needs.

- **Ligature:** Some fonts have special characters that are designed to replace specific character combinations. For example, “ff” and “fl” are frequently replaced with ligatures that combine the two characters to make them fit together more attractively. Moreover, some decorative fonts include less common ligatures, such as ligatures for “ct” and “st.” Which character combinations PDFpen replaces by ligatures depends on the ligatures available in the selected text’s fonts.

Here are the Ligature submenu choices:

- ▶ **Use Default:** This command substitutes the common ligatures for matching character combinations in the selected text.
- ▶ **Use All:** This command substitutes any available ligature, common or not, for matching character combinations in a selection.
- ▶ **Use None:** This command does not do any ligature substitution, and removes ligatures placed by the other two commands.

Use Default is ordinarily the best choice.

Note: Even if ligatures are substituted, you can still easily edit the text: for example, you can place your text cursor between the “f” and the “l” in the “fl” ligature just as if the two characters have not been replaced by a ligature.

- **Baseline:** The commands on this submenu affect the amount of vertical spacing between selected characters and the baseline:
 - ▶ **Superscript and Subscript:** These commands raise or lower the selected characters about half the character height each time you apply them. You might use these when typing formulas.
 - ▶ **Raise and Lower:** These commands raise or lower the selected characters a small amount (about 1 point) from the rest of the characters on the line each time you apply them. Use these commands to make fine adjustments, such as when you correct text on a page.
 - ▶ **Use Default:** This puts the characters back where they belong.

A Wise and Benevolent Ruler

For heavy duty text formatting, PDFpen supplies a ruler (**Figure 40**). Choose Format > Text > Show Ruler (Command-Control-R) to see it.



Figure 40: The ruler can set indents, tabs, alignment, and more.


The ruler spans the top of the document window, and the settings it displays are those for the currently selected text. If you have ever used Apple's TextEdit, you have seen this ruler.

The ruler provides most of the text layout controls you would find in a word processing application, and is the only tool in PDFpen with which you can easily do things like create numbered or bulleted lists or set specific amounts of line spacing.

You can copy and paste ruler settings from one text imprint to another or between text selections in an imprint with the Format > Text > Copy Ruler (Command-Control-C) and Format > Text > Paste Ruler (Command-Control-V) commands.

Correct or Remove Text on a Page

It's easy enough to edit text that you put on the page, but what about text that the PDF already contains? Here's how to correct text:

1. With the Select Text  tool, select the text you want to change.
2. On the document window toolbar, click Correct Text, or choose Format > Correct Text.

Depending on the underlying structure of the text object in the PDF, the text you've selected and a varying amount of surrounding text appear within a text imprint (**Figure 41**).

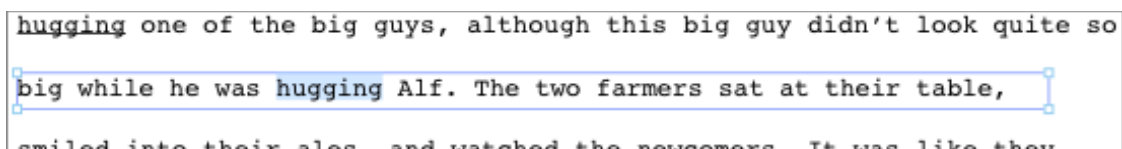


Figure 41: PDFpen puts your selection and surrounding text into an imprint when you use the Correct Text command.

3. Type your changes, or use a formatting or editing command, such as Format > Font > Bold, or Edit > Cut.

Your changes take effect. What's more, you can now move the imprint around, resize it, and do all the other stuff that you can do with the text imprints that *you* make. Zounds!

Here's how text correction works: PDFpen analyzes the various PDF text objects that contain your text selection, removes the text from those objects, and puts the text into a similarly sized imprint, matching the original objects' layout and formatting as best as it can. "As best as it can" is key here—your Mac, for example, might not have the same fonts installed that were used to create the document. Or maybe the text was created from OCR (see [Use OCR on Scans and Graphic Files](#)). In those cases, PDFpen has to "fake it" when it makes the imprint.

There are two kinds of "faking it" (these are gross oversimplifications—the processes belong in the realm of You Really Don't Want to Know):

- **The font is not on your Mac:** PDFpen examines whatever layout information it can scrounge up about the font and looks for the closest fit it can find on your Mac. The imprint will look similar, but not identical, to the original text. You may have to manipulate the imprint slightly to smooth out the differences.
- **The text object is the result of OCR analysis:** PDFpen looks for a font that lays out with roughly the same dimensions as the scanned text, but doesn't try to match the original font's look in the imprint that it creates (**Figure 42**). You may have to work hard to make the imprint come close to matching the original's appearance.



Figure 42: This text imprint was derived from an OCR analysis of a low-resolution JPEG image that was scanned from a decades-old typed letter. Note the default font, Helvetica 12, was used in the imprint, and that the imprint does not quite align with the underlying text image, which was scanned at a slight angle.

Fortunately, to make the corrected text imprint look as much like the original as possible, you have access to PDFpen's full range of text formatting capabilities: fonts, colors, sizes, baseline adjustments, kerning adjustments, line spacing, and so on. Learn them, and use them (see [Change the Appearance of Text](#)).

Tip: Don't try to correct huge amounts of text at once, especially in documents that have OCR text. The best use of the Correct Text feature is for minor touch-up work and careful, incremental changes.

Edit the OCR Layer in PDFpenPro

As described in [About OCR Accuracy and the OCR Layer](#), you can view the hidden text created when you perform OCR. In PDFpenPro, you can also correct text directly on the OCR layer instead of with the Correct Text feature (which creates a text imprint, as described just previously).

To correct text in the OCR layer, choose View > OCR Layer, and then click a word that you wish to correct, or drag to select several words to correct. A Correct OCR Text panel appears (**Figure 43**).




Figure 43: Use this panel to correct text in the OCR layer.

Enter your correction and click Apply. OCR layer corrections don't appear in the PDF: the underlying text image remains. However, text searches of the PDF will search the OCR layer, including corrections.

There's another kind of text correction you can make that doesn't require as much work: you can remove text completely. That is, in PDFpen terminology, you can *redact* it.

If there are confidential passages in your document, here's how you can remove each one with PDFpen's redaction capabilities:

1. With the Select Text  tool, select the text you want to remove.
2. Do one of the following:
 - ▶ Choose Format > Redact Text – Block.
 - ▶ Choose Format > Redact Text – Erase.

Here is how the two commands differ:

- **Redact Text – Block:** This command removes the text from the underlying text object, and places a black rectangle where the text was (**Figure 44**). In the case of scanned text, it also deletes the part of the image from which the scan was derived.

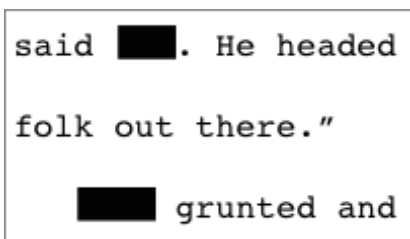


Figure 44: The names in this manuscript have been redacted to protect the innocent.

The black redaction rectangles are separate objects that you can move, fill with a different color, or resize—just on the off-chance you want to make your redactions a cheerful rainbow.

- **Redact Text – Erase:** This command removes the text from the underlying text object, and, in the case of scanned text, it deletes the part of the image from which the scan was derived.

Tip: You can also select a rectangular area of the page with the Select Rectangle tool and then choose Format > Redact Text – Block or Format > Redact Text – Erase to redact everything within the selection.

No Redaction for Imprints

If you select text in a text imprint, the Redact Text menu items are disabled. Similarly, if a rectangular selection includes an imprint, redacting the selection leaves the imprint untouched. You can redact only text that is in a PDF text object embedded in a page.

Search and Replace or Redact Text

If you've been reading this book from front-to-back, you'll have read that you can navigate in a PDF with PDFpen's Find feature (see [Navigate with Search Results](#) if you are of the non-linear reading persuasion). Find, though, is only one-third of that feature: it's really Find, Find and Replace, and Find and Redact.

You can search and replace text like this:

1. Choose Edit > Find > Find and Replace (Command-Option-F).

The Replace window opens if it is not already visible, and the cursor is positioned in the Find field.

2. Enter some text in the Find field.

As you type, matching results appear in the window (**Figure 45**).

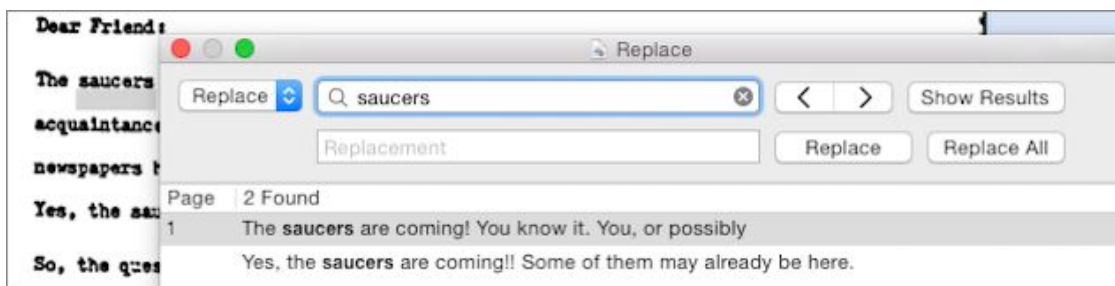


Figure 45: Use the window to perform Find and Replace operations.

3. Enter some text in the Replacement field.
4. Do one of the following:
 - ▶ Click a result in the Replace window and then click Replace—no, not the first Replace menu button to the left of the Find field (shown in the figure above), but the second one, between the Replacement field and the Replace All button.

- ▶ Click Replace All.

When you choose Replace, the following actions happen so quickly that you may not notice all the steps. First, the document displays the result that you clicked and selects the matched text. Then, that text is replaced with the contents of the Replacement field, after which the search result that you clicked vanishes from the window. Finally, the window selects the next search entry, if any. The end result is that everything is set up so that you can click Replace again to replace the new currently selected search entry. Lather, rinse, repeat.

On the other hand, when you choose Replace All, PDFpen replaces every occurrence of the text that matches the Find field with the Replacement field's contents. Depending on the size and complexity of the PDF document, this can take a few seconds. When the process finishes, no search results remain in the window, and the document shows the final replacement selected.

Here are some important points to keep in mind when you perform a search-and-replace:

- The search is both case-insensitive and word-boundary insensitive. If, for example, you search for the name **Alf** and replace it with **Sigurd**, not only will all occurrences of the name be replaced, but words containing the search term receive the replacement as well: **halfway**, for example, becomes **hSigurdway**.
- If the found text is not already in a text imprint (that is, if it is in a PDF text object embedded in the page), the act of replacing it creates a text imprint, just as though you had selected the text and chosen Format > Correct Text (read [Correct or Remove Text on a Page](#)). It even works with OCR text in a scanned image (as is about to take place in **Figure 45**, a page or so back).

The steps to perform a search-and-redact operation are similar to those for a search-and-replace:

1. Choose Edit > Find > Find and Redact (Command-Shift-F).

The Redact window shows its Find field and includes a menu with redaction options (**Figure 46**).

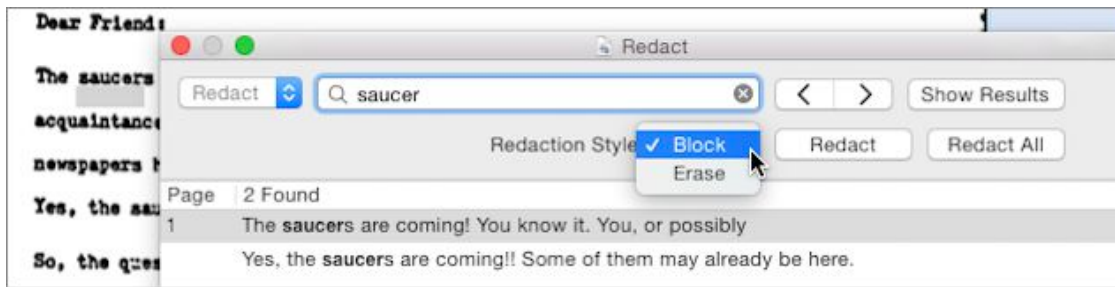


Figure 46: The Redaction Style menu gives you the option of blocking out or erasing search results.

2. From the Redaction Style pop-up menu, choose a redaction style.

You have the same two choices as for manual redactions: Erase or Block (these are described in [Correct or Remove Text on a Page](#), a few pages earlier).

3. Do one of the following:

- ▶ Click Redact (the button to the left of Redact All in the figure above) to redact matching results one by one.
- ▶ Click Redact All to redact every occurrence of the search term in the text.

Keep these points in mind when you search and redact:

- Redaction searches are also case and word-boundary insensitive, matching the search string no matter where it occurs in the PDF.
- As with manual redaction operations, the redact operation *only* redacts text that is in a PDF text object embedded in the page; it does *not* redact any text that occurs within text imprints. Instead, you can perform a find-and-replace on those occurrences and remove the text from imprints that way (you will have to create the black redaction box by hand if you want to indicate a redaction).
- Find and Redact doesn't search a PDF's metadata. (For instructions on modifying a PDF's metadata, read the bullet item on "Document Info" in [The Inspector](#).)

Add and Alter Pictures

PDFpen can import a number of image formats, including all the usual suspects: JPEG, TIFF, GIF, PNG, and Photoshop. When images are imported, PDFpen converts them silently to PDF image objects.

You can import image files simply by dragging them from a Finder window or your Desktop directly onto the page currently displayed in the PDFpen document window.

You can also drag an image file to the Thumbnail sidebar, in which case PDFpen creates a new page and centers the document on that page.

Or, if you prefer, you can follow these steps, which use the standard Open dialog and help you if you need to search for the file by name:

1. Click Insert  on the document window toolbar.

The standard Open dialog slides down.

2. In the dialog, optionally use the search field to locate the file, and then select the file and click Open.

The image appears centered on the page currently displayed in the document window. In a new, blank document, a page is created and the image placed on it.

Once the image is in PDFpen, it can be moved from one page to another by cutting or copying it from its current page and pasting it onto a different page.


Pay Attention to the Selection

When you paste an image, make sure that the document area of the PDFpen window is active rather than a thumbnail in the sidebar. If a thumbnail is selected and active (that is, it is highlighted in color), pasting creates a new page comprising just the Clipboard contents instead of putting those contents on the page shown in the document area of the window.


Resize and Crop an Image

It's rare that an image you insert into a PDF is exactly the right size and shape. However, you can resize and crop them painlessly.

To resize an image, do the following:

1. With the Edit  tool, click the image.
2. Drag any corner of the image to resize it; hold down Shift as you drag to maintain the image's proportions.

Cropping an image is not much more difficult:

1. With the Edit  tool, click the image and then choose Edit > Crop Image.

A cropping control panel appears at the bottom of the document window and the image is highlighted with its current dimensions indicated at the top left and bottom left (**Figure 47**). A cropping rectangle is superimposed on the image.

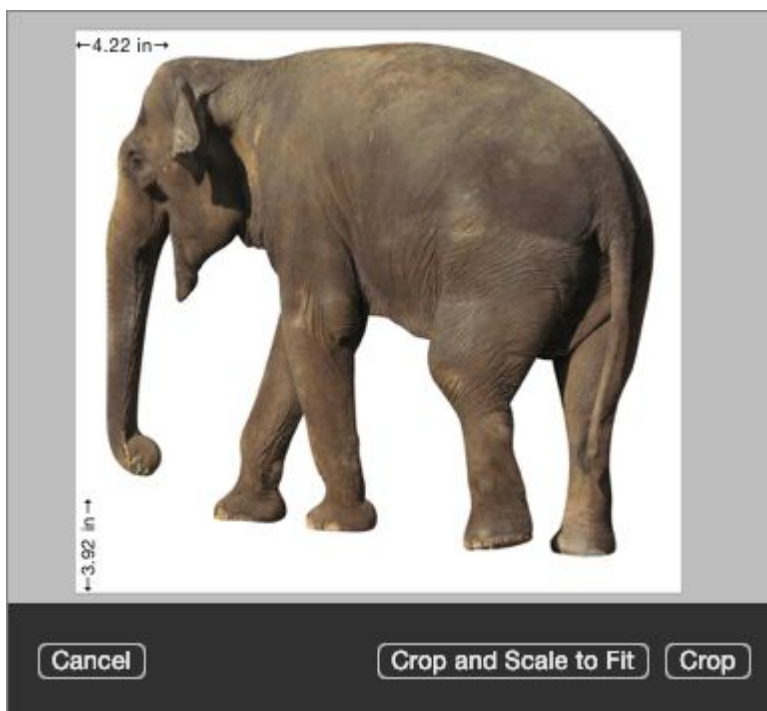


Figure 47: This image is on the verge of being cropped.

2. Drag within the image boundaries to move the cropping rectangle; drag from any corner or edge to resize it.

As you move the cropping rectangle, the area outside of the cropping rectangle appears with reduced contrast to highlight the area to be cropped, and the size indicators change to reflect the current dimensions.

3. Do one of the following:


- ▶ Click Crop to crop the image to the highlighted area.
- ▶ Click Crop and Scale to Fit to crop the image but have the cropped image scale to match either the original horizontal or vertical dimension.

If the horizontal dimension of the cropped image is the largest dimension, the image scales to fit the original horizontal dimension; if the vertical dimension is largest, the cropped image scales to fit the original vertical dimension.

Straighten and Adjust an Image

When an inserted image is slightly skewed or is poorly exposed, you can compensate—within limits, of course: PDFpen can work minor wonders, but not miracles.

Follow these steps:

1. With the Edit  tool, click the image and then choose Edit > Deskew and Adjust Image.

The Deskew and Adjust controls appear at the bottom of the document window (**Figure 48**).

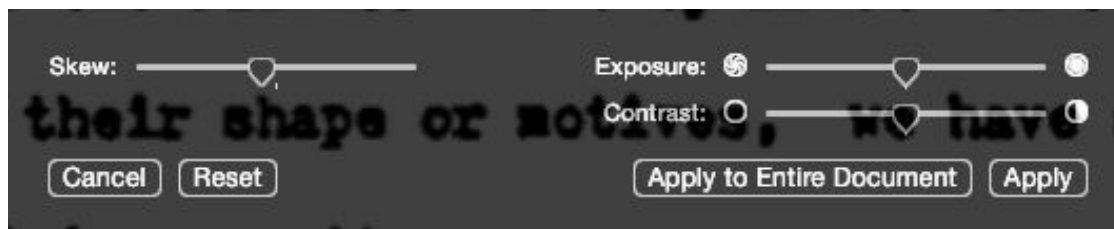



Figure 48: The Deskew and Adjust controls can affect the selected image or all of the images in the document.

2. Drag the Skew slider left or right to adjust the tilt of the image so that it appears straight. The Skew slider is limited to about 20 degrees of adjustment.
3. Drag the Exposure slider left or right to decrease or increase the exposure (brightness) of the image; drag the Contrast slider left or right to decrease or increase the image's contrast.
4. Click Apply.

Tip: You can click Apply to Entire Document if all the images in your document suffer from the same shortcomings, which might happen if they all come from the same source, such as a misadjusted scanner.

You can make more complex image adjustments as well with PDFpen's Image Edit panel:

1. With the Edit  tool, click the image and choose Edit > Adjust Image.

The Image Edit panel appears with its Adjust tab selected (see **Figure 49**).

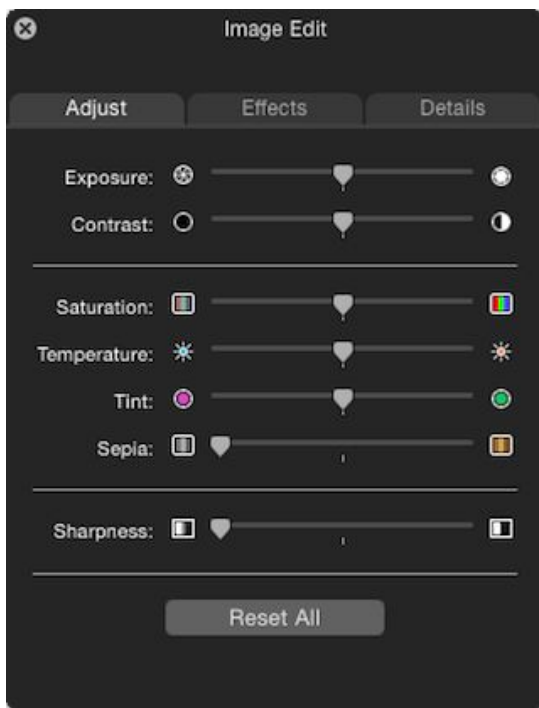


Figure 49: The Image Edit panel provides controls similar to those found in iPhoto and many other image-editing applications.


2. Drag the various sliders to adjust the image's appearance; if things get out of hand, click Reset All and try again.
3. Close the Image Edit panel or click another tab in the panel to make your changes take effect.

You can apply some preset effects with the Effects tab of the Image Edit panel as well, such as blurring the image, applying an “antique” effect, and inverting all of the colors to make a color negative of the image. The Effects tab displays thumbnails showing the various effects so you can preview before you try them. Unlike the controls in the Adjust tab, they don't take effect when you switch tabs: to apply an effect, select it and then close the Image Edit window.

The Image Edit panel's Details tab displays statistics about the image. It has no controls that you can adjust.

Resample an Image

When you know that your PDF is going to be reproduced on a black-and-white printer, or if the size of your PDF file is too large because of all the color images in it, you can resample the images to change their color depth and resolution.

To resample an image, click the image with the Edit  tool and choose Edit > Resample Image. The Resample controls appear at the bottom of the document window (**Figure 50**).

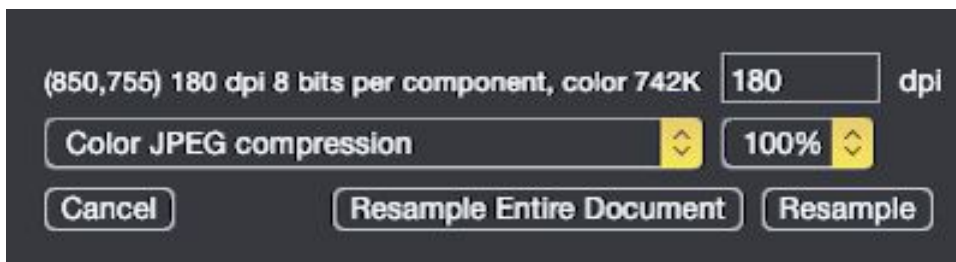


Figure 50: Reduce the resolution and color depth of an image with the Resample controls.

Here are the resampling actions you can take:

- **Type a different DPI value:** Lower values make the image appear blurrier but reduce how much storage the image requires. (Higher values have no visual effect but increase the storage requirements.)
- **Change the compression type:** Here's what the choices on the pop-up menu mean:
 - ▶ **Color JPEG Compression:** This is the standard format for color PDF image objects in PDFpen.
 - ▶ **Grayscale:** Grayscale will make your image look like a black-and-white photo.
 - ▶ **1-Bit Threshold:** Every pixel in the image that is more than 50% gray is made white and all the others black, creating a silhouette effect.
 - ▶ **1-Bit Dither:** Black-and-white dot patterns simulate levels of gray; the resulting image has less detail and resembles a low-resolution fax.

Note: Grayscale uses less storage space than color, and 1-bit images use the least storage.

- **Choose a quality percentage:** This pop-up menu is available only for Color JPEG and Grayscale compression. Generally, the higher the quality percentage, the more storage space the image requires. Reducing the percentage can make a color or grayscale image look dithered or banded, but saves storage space.


Click Resample to have your settings take effect; click Resample Entire Document to apply the settings to every image in the document.

Tip: Unfortunately, the Resample controls don't give you a preview of how they effect the image, but you can choose Edit > Undo Edit Image if the results are not to your liking.

Make a Transparent Image

PDFpen can select a color or color range in an image and “knock it out” so that any objects behind the image on the page can be seen through the knocked-out holes. This is exactly what you need when you make a signature to use on forms (see [Add a Scanned Signature](#)), and it is useful for decorative purposes, such as for creating a border on a page.

You can knock out a color range in an image to make it transparent in three quick steps:

1. With the Edit  tool, click the image and choose Edit > Make Transparent Image.
2. In the dialog that slides down, click the eyedropper on the color you want to knock out (**Figure 51**), and then slide the Tolerance slider until the image shows the desired transparency (**Figure 52**).

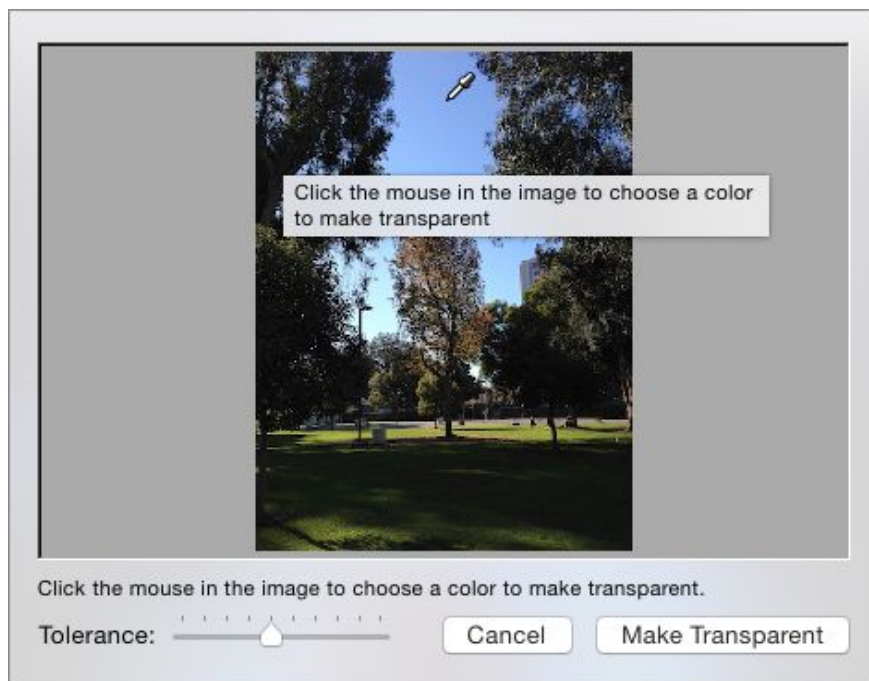


Figure 51: This image is about to have the sky knocked out.

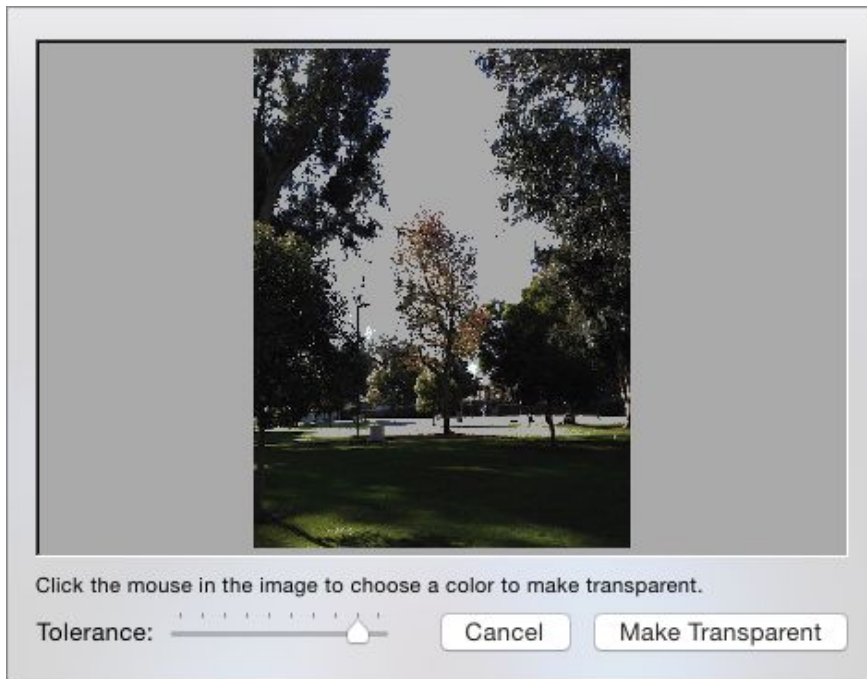


Figure 52: Excuse me while I lose the sky...

3. Click Make Transparent.

Colors that fall within the range you specified disappear, and anything behind the image can be seen through the no-longer-visible parts of the picture.

Tip: When you select an image, shortcut buttons for deskewing, cropping, adjusting, resampling, and making transparent images appear in the Edit Bar—if the document window is wide enough to display them.

Rearrange, Rotate, and Crop Pages

When you create a PDF out of bits and pieces of other PDFs (see [Combine Existing PDFs](#)), you may want to adjust the pages that you've brought together. For example, a page may consist of a full-page graphic and need to be rotated from landscape to portrait orientation, or a range of pages may need to be reordered, or some legal-size pages may need to be cut down to letter-size.

PDFpen can help you with all of those tasks.

Rearrange Pages

The Thumbnail sidebar and your preferred pointing device are the tools you need to rearrange pages in a PDF. Follow these steps to move a page from one place to another in a PDF:

1. Choose View > Thumbnails to show the Thumbnail sidebar if it isn't already visible.
2. Drag the thumbnail of the page you want to move to its new location in the sidebar.

As you drag the thumbnail, a black line appears to the right of each thumbnail you pass over, indicating that, were you to drop the dragged thumbnail at that moment, the page would be placed at that point.

Note: To move a page to the very beginning of the PDF, drag to the left of the very first thumbnail.

Tip: You can widen the Thumbnail sidebar to see more thumbnails at once, which is helpful when you need to do a lot of page rearranging.

But suppose you need to move a small group of pages to a new location in a very, very long PDF. Dragging could quickly become tedious in that situation. The following steps explain how to do big moves over long distances in a PDF:

1. In the Thumbnail sidebar, Shift-click or Command-click to select the pages you want to move.
2. Choose Edit > Cut.
3. Scroll to the thumbnail of the page after which you want place the pages you've cut, click it, and then choose Edit > Paste.

The pages appear following the page you clicked.

Note: If you need to move a selection containing multiple pages a short distance, you can drag them just as you do a single page.

Rotate a Page

When a page doesn't match the orientation of the others in a PDF document, hilarity can ensue when the document is printed. Some programs, like PDFpen, can automatically rotate such pages, but not everyone (yet) uses PDFpen. A recipient of your PDF might have a program that crops the disorientated page to fit when it prints.

To reorient a disorientated page, follow these steps:

1. Navigate to the page that is oriented differently from the others. An easy way to find such pages is by viewing them in the Thumbnail sidebar (**Figure 53**).



Figure 53: One of these pages is not like the others.

2. Click the page and then do one of the following:
 - ▶ To rotate the page 90 degrees clockwise, choose View > Rotate Right (Command-R).
 - ▶ To rotate the page 90 degrees counterclockwise, choose View > Rotate Left (Command-Shift-R).


Which direction depends on your needs (and maybe the direction in which your head tilts best), but, in either case, the page is reoriented.

Tip: If you plan to edit any text on the page, do so before you rotate it. Although you can select and correct text on a rotated page, it can be awkward.

Crop a Page

As common as 8½-by-11 pages are in the United States, not everyone uses pages with those dimensions, and, when it comes to PDFs that are to be printed in a book or pamphlet, the page dimensions can differ significantly.

When you have a PDF that *must* be cut down to size, PDFpen can help:

1. Navigate to the page you wish to crop.
2. In the Editing Bar, click the Select Rectangle  tool.
3. On the page, drag to select the proper dimensions.

As you drag, the current dimensions of the selection rectangle appear along its sides (**Figure 54**).

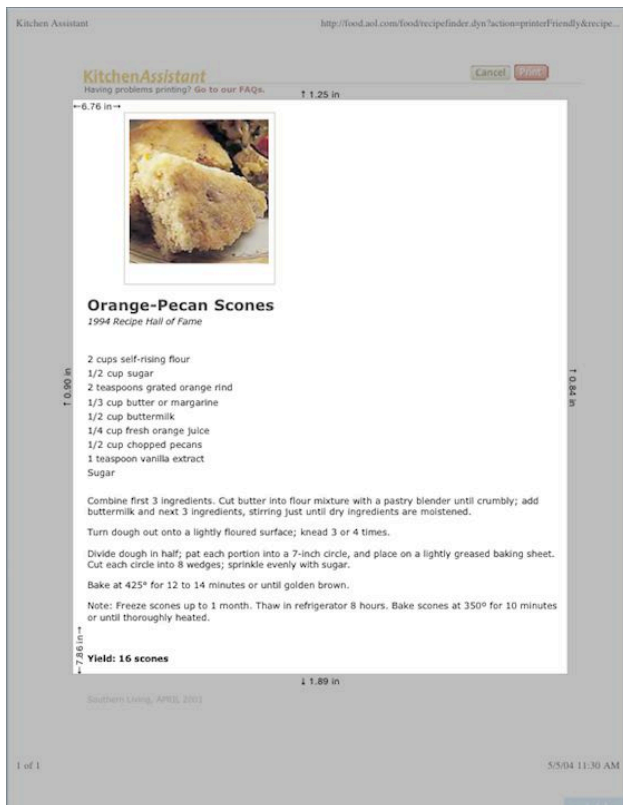


Figure 54: This page is getting a much-needed trim.

Tip: You can change the units used when displaying dimensions—say, from typographer’s points to inches—in PDFpen’s Editing preferences.

4. Choose Edit > Crop Page to Selection or click Crop Page to Selection on the Editing Bar.

The page is cropped to the dimensions you chose.

Tip: Hold down the Option key to change the menu command to Crop Document to Selection. This crops every page to the same dimensions and is handy when you want to crop an entire document.

Insert Page Numbers

After you have changed and rearranged the pages in your PDF as described elsewhere in this chapter, you may want to put page numbers on its pages. PDFpen has a command for that: Edit > Insert Page Numbers. This command produces the dialog shown in **Figure 55**.

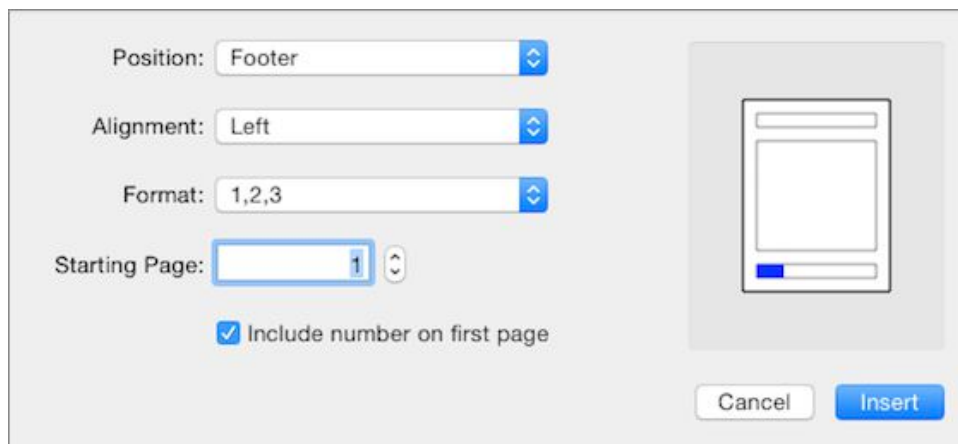


Figure 55: Use this dialog to configure how PDFpen numbers pages.

Most of the options in the dialog need no explanation, but here are the ones that might puzzle you:

- **Inside, Outside:** These options appear on the Alignment pop-up menu and are useful when the PDF will be printed double-sized and bound. When you choose Outside, page numbers appear aligned

with the right margin on *recto* pages (pages on the right in bound books) and with the left margin on *verso* pages (the left-hand pages in bound books). Inside places the number on the left for recto pages and on the right for verso pages.

Tip: Choose View > Facing Pages when using the Inside or Outside settings to see what they do; you can always choose Edit > Undo immediately after issuing the Insert Page Numbers command if its results are not what you want.

- **Bates Numbering:** This option, found on the Format pop-up menu, is a numbering system often used for legal and business purposes. With this kind of numbering, each page of the document is given a unique page identifier, for example “Exhibit 5A00034”. You supply a prefix for the page number and the number of digits to be used for the page number in the two fields that appear.

The Insert Page Numbers command creates an imprint containing a page number on each page of the PDF. The imprint is placed and formatted as you have specified.

Multiple Sections and Page Numbering Tip


Sometimes a long document might have sections, each with its own page numbering. Although PDFpen doesn't provide that functionality, you can work around that relatively easily. Use the techniques described in [Combine Existing PDFs](#) to make each section into a separate PDF document and then use the Insert Page Numbers command on each document. Then, simply combine those documents into a single document again.


Create Links

Sometimes you want to direct your readers to a different page in a PDF, or to a Web page that has useful information. In fact, if you are reading this book in PDF form (and many of you are), you have already seen, and probably used, some of the links that appear within it.




Unlike HTML links, which are attached to text or objects on a Web page, PDF links consist of transparent rectangular objects that you place on top of some text, an image, or, in fact, any area of the page that you want to link to another location.

As I described in [The Markup Tools](#) (←oh, look: a link!), there are two tools for creating links: a Page Link  tool and a URL Link  tool.

You can move and reshape link objects with the Edit  tool. You can also change their appearance: by default, PDFpen makes them completely transparent with no border stroke, but you can change that with the object property tools in the Editing Bar (see [Draw Attention](#)). You may, in fact, want to give link objects a stroke or a semi-transparent fill color because, otherwise, they are impossible to see once you have created them!

Tip: To test a link object after you create it, click it with the Select Text  tool.

To link to another page in a PDF, do the following:

1. Choose Tools > Page Link, or, in the Editing Bar, click the markup tools  segment of the tool-selection button and then click the Page Link  tool.
2. With the Page Link  tool, drag a rectangle over the text, image, or page region that you want to link to another page in the document.
3. In the Set Link dialog that appears, enter a page number in the Page Number field, and then click OK.




When you set a page link and then add pages to the document so that the page to which you linked moves, the page link still works. For example, if you set a link on page 1 to go to page 4, and then you add a page between pages 1 and 4 so that page 4 becomes page 5, the link on page 1 still works as intended, taking you to page 5.

Warning! If you manually move a page after you place page links on it, its page links are deleted.

Note: If you accidentally specify a page in the Set Link dialog that does not exist in the document, PDFpen assigns the link to the page number of the last page in the document.

A URL link, when clicked, opens a Web browser (usually the default browser on the device displaying the PDF), and loads the Web page pointed to by the link.

You add a URL link that goes to a Web address like this:


1. Choose Tools > URL Link, or, in the Editing Bar, click the markup tools  segment of the tool-selection button and then click the URL Link  tool.
2. With the URL Link  tool, drag a rectangle over the text, image, or page region that you want to link to a Web address.
3. In the Set Link dialog that appears, enter a Web address in the URL field, and then click OK.

Use Complete URLs

Partial URLs do not work. For example, if you enter the address www.smilesoftware.com into the Set Link dialog, the URL link does nothing when you click it. However, <http://www.smilesoftware.com> does open your browser and load the page at that address.

How to Edit Links

Page links and URL links use the same Set Link dialog. You can change a link object from one kind of link to another by clicking either Page or URL in the segmented button near the top of the dialog.

You can also change the link destination of any link object: double-click the link object with the Edit  tool and enter a new location in the Set Link dialog.

Make an Interactive PDF Form (Pro Feature)

“You can talk all you want [...] But you gotta know the territory!” chants a salesman in the first scene of *The Music Man*. But how do you get to know the territory?

You ask questions, that’s how.

One way to ask questions is with a form. PDFpenPro has tools for making interactive PDF forms. With these tools, you can ask questions to get the information you need. And, with the email and Web submission capabilities that you can build into a form, you don’t have to go out to the territory to get that information—*it comes to you*.

So, you can talk, you can talk, you can bicker, you can talk, but with an interactive form, you can get to know the territory.

Build a Form

A form can be as simple as a single checkbox, or as complicated as an IRS Schedule C. But, as you saw in [Fill Out PDF Forms](#), all forms consist of only a few simple elements—such as text fields and checkboxes. You can use these elements repeatedly and in combination.

I’ve made a form that demonstrates each form element available in PDFpenPro (**Figure 56**). In the following pages, I use my example form, “Wizard_Tim.com User Survey,” to explain each form element. I started with a new blank one-page PDF (see [Create a PDF](#)), but you can add form elements to any PDF.

Tip: If all you need are checkboxes and text fields in your form, you can create a form almost automatically; skip ahead to [Let PDFpenPro Build Your Form](#).

Wizard Tim.com User Survey

User Name:

Quest:

Favorite Color: Red Green Blue


Knights:

- Brave Sir Robin
- Sir Galahad
- Sir Fête of Pleasure

Supplies:

-
-
-
-

Figure 56: The Wizard Tim needs to know a few things, and he uses this form, which contains each form element available in PDFpenPro, to learn them. Heck, it's less work than casting a spell.


To access form elements, click the Form tools segment, located on the right end of the Editing Bar's tool-selection  button. Each individual form element has a group of properties you can set in the Inspector to name the element and describe how it operates. As we proceed, I'll explain the properties associated with each form element. Before we begin this guided tour, though, you may want to refer back to [The Form Creation Tools \(Pro Feature\)](#) to refresh your memory.

One Form per PDF

Unlike Web pages, which can have multiple forms on a single page, you can have only one interactive form in a PDF made by PDFpenPro. Another way to think about it is that the PDF *is* the form.

Make a Text Field

The Name field in Wizard Tim's form represents that staple of the interactive form, the text field. Use a text field when you want free-form information from your respondents that you can't anticipate.

To make a text field, drag it out on the page with the Text Field  tool.

Once you have the field in place, you set its properties in the Form Element Properties tab of the Inspector (**Figure 57**).

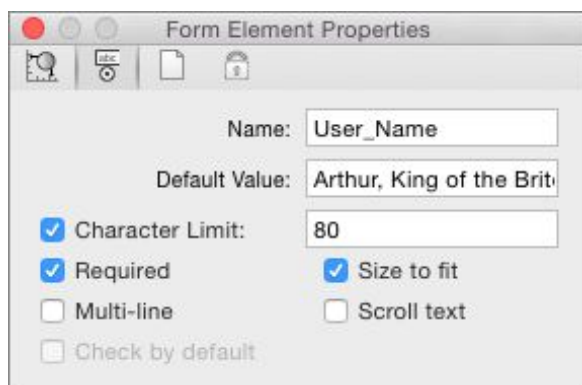




Figure 57: The Inspector shows the properties of a text form field.

To see a field's properties, click it with the Edit  tool (if you use the Select Text  tool, PDFpenPro assumes you want to enter information into the field).

Here is some advice for customizing the properties of a text field:

- **Name:** Every text field should have a distinct name. PDFpenPro gives each new field a unique name, but you should change it to reflect the type of information the field is for. As you can see by the size of the Name field in the Inspector, names are expected to be short.

Note: Good element names are important. When you receive form data from an interactive form, the name of the element labels the data from that element. A short, descriptive name can help you interpret the data you get back more easily.

- **Default Value:** This property can be empty. If you put text in it, that text appears in the form element as its default value, although the respondent can change it; if you leave the Default Value blank, the element is empty until the respondent fills it in.


Tip: To check the default value of a form element as you are building the form, choose Edit > Reset Form.

- **Character Limit:** You can enable this property and then specify the maximum number of characters the respondent can put in the field. For example, you might limit a field for a telephone area code in the United States to three characters. When this property is disabled, respondents can type only as many characters as will fit in the field visibly unless Scroll Text or Size to Fit is enabled (see below).
- **Required:** Select this checkbox if the field must be filled in before the form is submitted. Most programs that allow respondents to fill out PDF forms display an error dialog if a required field is empty when the respondent submits it.
- **Multi-line:** When this property is enabled, text typed in the field can wrap when the text reaches the edge of the field.
- **Size to Fit or Scroll Text:** If you select one of these boxes and the other is already selected, the other is automatically deselected:
 - ▶ Select Size to Fit if you want text the user enters scaled in size so that it fills the field. The text that the respondent types becomes smaller once the field's boundaries are reached.
 - ▶ Select Scroll Text to allow text to scroll beyond the borders of the field.

Note: Both Size to Fit and Scroll Text can be deselected. In that case, the field can contain only as much text as can fit within its borders at the field's default text size.

Offer a Single Choice

A choice element allows the respondent to choose one item from a set of items. In PDFpenPro a choice element resembles a drop-down menu, such as the Quest item shown in the survey (**Figure 56**, a few pages back), although other PDF programs may display a choice element quite differently. A choice element can optionally allow the respondent to type in an item that isn't among those provided.

To place a choice element on the page, drag with the Choice  tool.

Note: You can drag a rectangle as tall and as wide as you like when placing a choice element, but the visual components of the element have a fixed height, so any extra space above or below it on the page is wasted space on the form.

Use a choice element when you have several mutually exclusive choices to offer and a limited amount of room in which to present them.

Figure 58 shows the properties associated with the choice element.

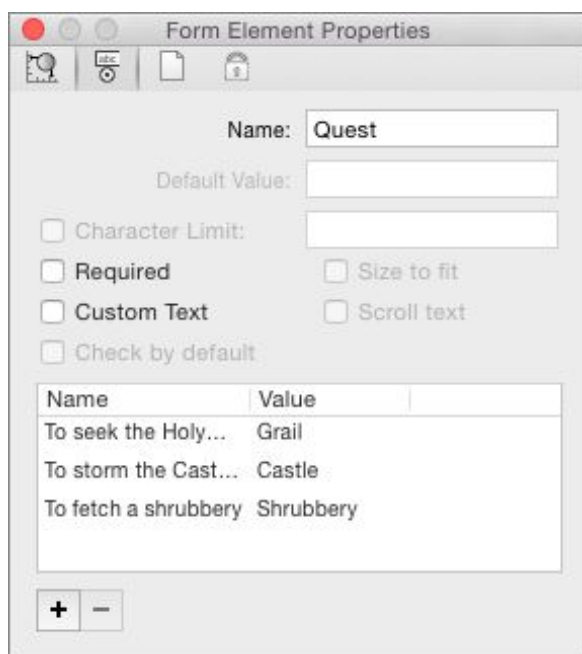


Figure 58: You can add and remove choice element properties.

You can modify these choice element properties:

- **Name:** Each choice element requires a unique name. As with the text-field element, enter a short descriptive name so you can identify the data when it is returned.
- **Required:** Enable this property if the respondent must make a choice before submitting the form.
- **Custom Text:** Select this to allow the respondent to type in a choice that doesn't appear among those that you have provided. A choice element that allows custom text shows a text cursor when the respondent clicks the body of the element; the respondent must click the arrow controls at the right of the element to display the choices you have offered.
- **Name-Value box:** Recall that a choice element offers the user a list of choices. Name-Value pairs supply those choices. Click the add **+** button to add an empty Name-Value pair, and then click the selected pair in the list box to add a name and a value. The name is what the user sees and can choose in the choice element; the value is the data returned when the form is submitted. For example, in the choice element whose properties are shown in **Figure 58**, earlier, if the respondent chooses *To Storm the Castle Anthrax*, the form will return the value of *Castle*.

If you don't supply a value, the name is returned. In such cases, you may want to use short names.




To remove a Name-Value pair, select it and then click the remove **-** button.

Make Checkboxes

The data from checkboxes is returned *only* when the respondent checks a box on the form; you never receive data from unchecked boxes.

You use checkboxes to provide a respondent with what amounts to a true-false question. For example, in Wizard Tim's survey (**Figure 56**, back a few pages), the Knights checkboxes allow the user to answer

the implied question “Is this knight accompanying you?” for each listed knight (Brave Sir Robin must have turned his tail and bravely fled when the form was filled out).

Click with the Check Box  tool to create both a default-size checkbox and a label (a text imprint) for it. Or, you can instead drag with the Check Box  tool to create a checkbox that has a custom size. To edit the label text, use the Select Text  tool.

You can customize the following checkbox properties (**Figure 59**):

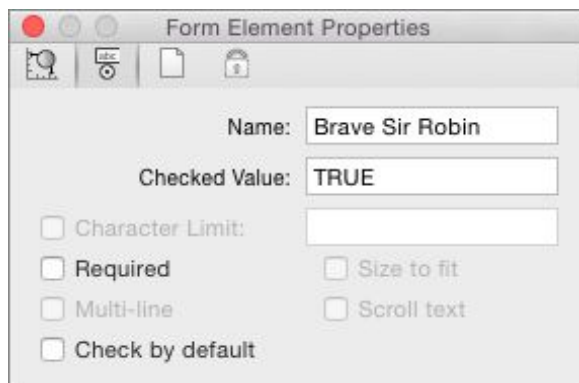




Figure 59: Checkboxes return a value only when checked.

- **Name:** Each checkbox should have a unique name; if two or more checkboxes have the same name, they behave like radio buttons (see the section about radio buttons, just after this list), which violates normal user-interface conventions and can confuse the respondent. The best practice is to use the same name as the one in the checkbox label, or a shortened version of it.
- **Checked Value:** By default, the value returned from a checked checkbox is **TRUE**, but you can use a different value if you have a special need.
- **Required:** Enable this property if the respondent must check the checkbox before submitting the form. Unless you are using the checkbox like a radio button, you should leave this property disabled.
- **Check by Default:** Enable this property to have the checkbox checked when the form is first opened or when it is reset.

Offer Radio Button Choices

In Wizard Tim's survey (**Figure 56**, shown near the start of this chapter), the Favorite Colors are presented as radio buttons. Radio buttons offer a small set of mutually exclusive choices. When the user clicks a radio button in a group, the other buttons in the group are deselected. It's good user-interface practice to restrict the number of radio buttons in a group to five items or fewer.

Click with the Radio Button  tool to create both a default-size radio button and a text imprint label. You can drag with the tool to create a radio button that has a custom size.

When you add a radio-button group, you should add an additional text imprint with the Text  tool to label the entire group, as Wizard Tim does in his survey. You can use that label, or a shortened form of it, as the Name property for each of the radio buttons in the group. For example, the name of the three Favorite Color buttons in Wizard Tim's survey is **Color** (**Figure 60**).

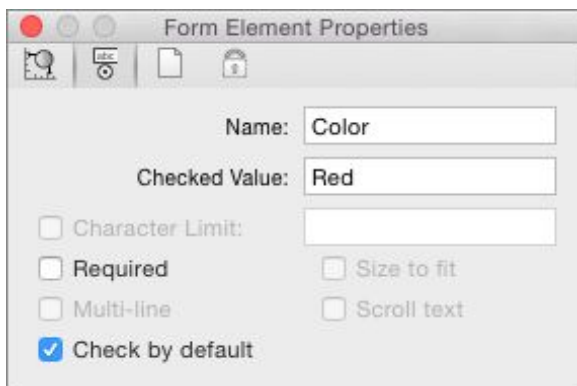


Figure 60: All radio buttons in a group share the same Name property but have different Checked Value properties.

You need to set at least the first two of these radio-button properties:

- **Name:** Each radio button in a button group should share the *same* name so that clicking one deselects the others that share that name.
- **Checked Value:** The best practice is to use a short version of the text that labels the individual button. If the form is submitted with this radio button selected, the name assigned to the button group


will return the value in this field. Although all buttons in a group should have the same Name property, they should each have a different Checked Value property.

- **Required:** Enable this property if the respondent must select one of the buttons in the radio-button group before submitting the form. If you enable this property for one button in the group, you should enable it for all buttons in the group, since they are treated as a unit.
- **Check by Default:** Enable this property to have the button appear selected when the form is first opened or reset. You should set this property for only one button in the group, because, by convention, no more than one radio button in a group can be selected at a time.

Make a List

You use a list element to display a list of items from which the respondent can choose. Wizard Tim uses a list element to list the supplies that the respondent possesses in the survey form shown near the beginning of this chapter (**Figure 56**).

A list can allow the respondent to select only one item, or it can allow the respondent to select multiple items by Shift-clicking a range of adjacent items, or by Command-clicking non-contiguous items (Windows users can Control-click to choose non-contiguous items). Wizard Tim's list allows multiple items to be selected.

Use the List  tool to drag a rectangle out on the page. If the number of items is longer than can be displayed within the list's area, the respondent can scroll through the list.

You can set the following properties for a list element (**Figure 61**):

Name	Value
Coconut	Coconut
Sword	Sword
Swallow	Swallow
European swallow	EuroSwallow

Figure 61: List element properties resemble choice element properties, but you can select more than one choice.

- **Name:** Each list element requires a unique name.
- **Required:** Enable this property if the respondent must select at least one item before submitting the form.
- **Select Multiple:** Enable this to allow the respondent to choose more than one item in the list.
- **Name-Value box:** I explain this box in more detail a few pages earlier where I describe the choice element. As with a choice element, you use Name-Value pairs to supply the list element with content. The add **+** button and the remove **-** button work the same way as they do in a choice element's properties. And, like choice elements, if you don't supply a value in a Name-Value pair, the name is returned.

Make an Interactive Signature

An interactive signature allows respondents to sign an interactive form by hand. When respondents click the field, a dialog appears in which they can scribble their signatures using a trackpad, stylus, or similar

pointing device (they can even use a mouse or a trackball if they are sufficiently dexterous)—or they can drag a signature graphic (see [Add a Scanned Signature](#)) directly into the interactive signature dialog, as in **Figure 62**.

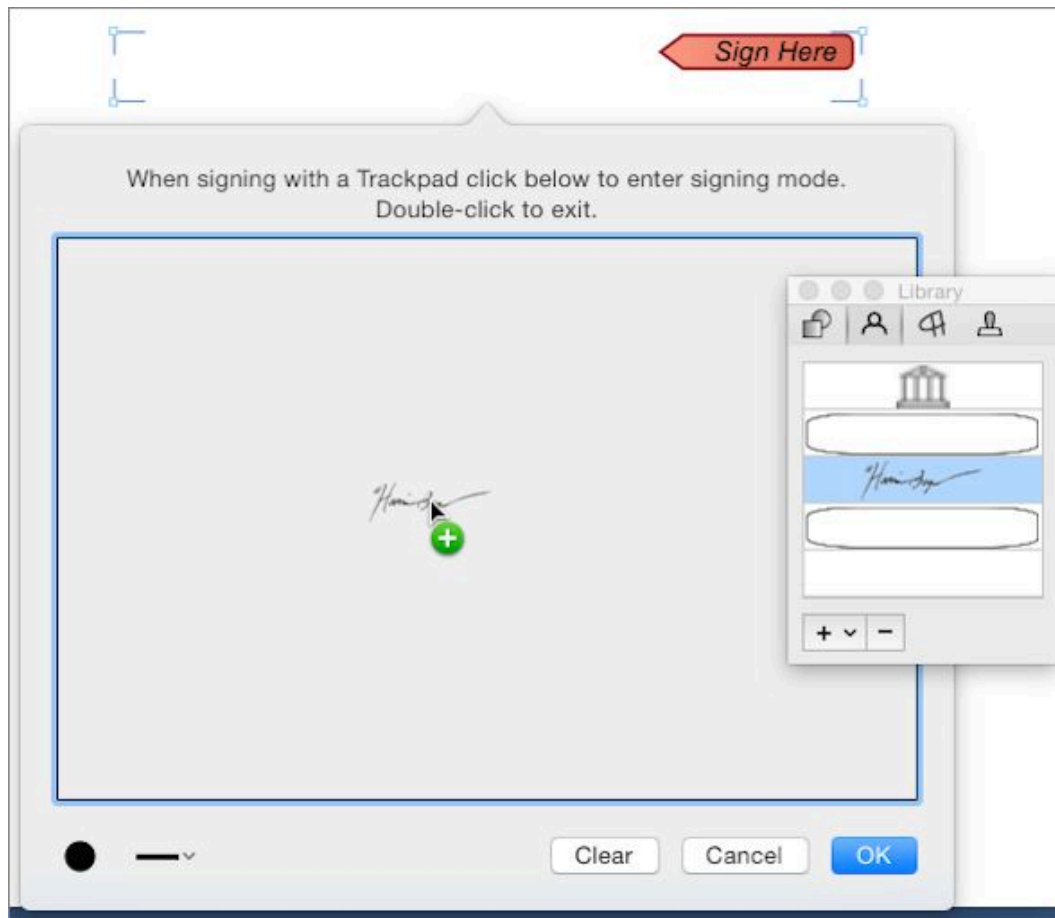




Figure 62: Sign an interactive signature field with your finger, or drag a graphic into the field’s dialog.


To create an interactive signature field, drag out a rectangular area on the form with the Signature Field  tool. The field has markers at each corner to indicate the field’s dimensions, and it includes a graphic “Sign Here” stamp. When the respondent signs the field, the stamp goes away and the signature appears within the field’s boundaries. The submitted form includes the signature graphic.

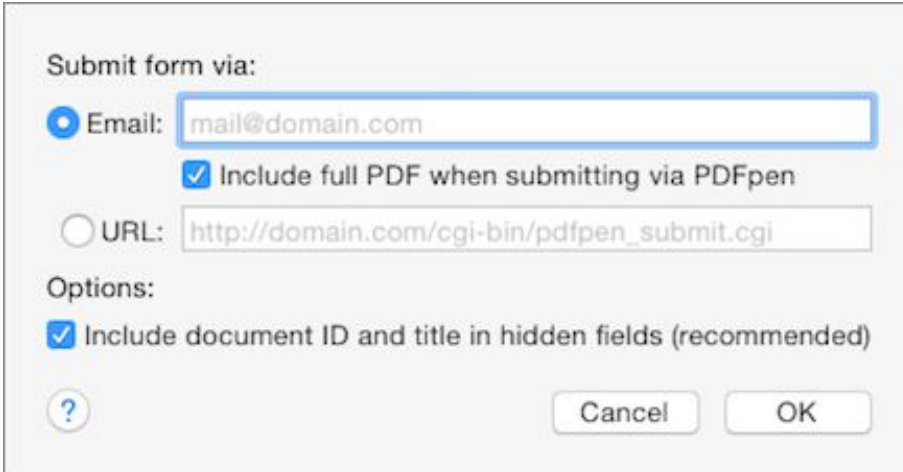
The Inspector provides no properties that you can set for interactive signature fields. However, you can set the color of the signature and the thickness of the signature stroke with the two controls  at the bottom-left of the signature field dialog.

Make a Submit Button

Respondents use a submit button to send the information on the form, and, optionally, the form itself back to the form's originator; e.g., *you*. The Wizard Tim's survey shown near the beginning of this chapter (**Figure 56**) has such a button at the bottom, but you can put it anywhere you like.

Tip: In fact, you can have multiple submit buttons in the same PDF, and each can be designed to send the form content to a unique destination, which could be useful for allowing the user to choose which of several people should receive the form content.

With the Submit Button  tool, click the page to create a default-size submit button or drag to create a button with a custom size. PDFpenPro displays a dialog with submission options (**Figure 63**). Use the options to specify the destination for the form's data.



Submit form via:

Email:

Include full PDF when submitting via PDFpen

URL:

Options:

Include document ID and title in hidden fields (recommended)


Figure 63: Send the form's data to either an email address or a Web address. The Web address should point to a script that can process the form's data, as the built-in example implies.

The form can be set up to submit data by email to a specific address or via the Web to a specific URL:

- In the case of email, you can choose whether the PDF is included; the XFDF form is always attached (XFDF is a forms data XML format, the full name of which is XML Forms Data Format). The message is sent with the respondent's default email program.

- When a form submits data to a URL, it is sent as XFDF data.

Note: You can find out more about XFDF from [Adobe](#), which curates the format.

If you later want to edit the submission options, double-click the submit button with the Edit  tool, or access the submission options in the button's form element properties in the Inspector (**Figure 64**).

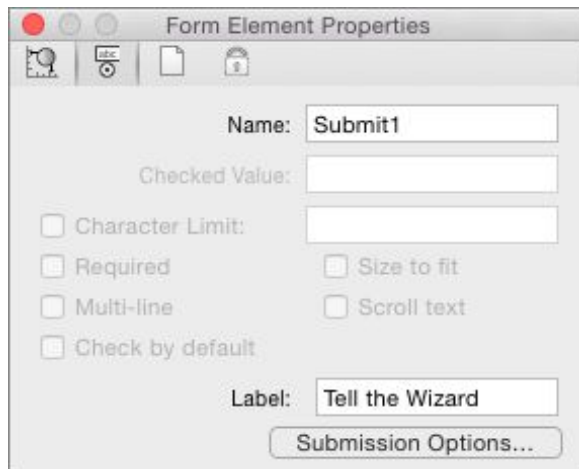


Figure 64: The submit-button element's properties include a name, a label, and the submission options.

Aside from the submission options, the other properties you can set are minimal:

- **Name:** Like any other form element, the submit button needs a name. It should be a unique name within the document.
- **Label:** Enter the text you want seen on the button.

About Forms Processing

You can find scripts for processing form data, and get additional information, at [Smile's Web site](#). In addition, I suggest you consult the advanced topic in PDFpenPro's Help, "Backend Processing of PDF Forms."

Also, you can use the Export Form Data script that comes with PDFpen to see the values that are returned from a form (see [The Scripts](#)).

Let PDFpenPro Build Your Form

Very often, all you need on a form are text fields and checkboxes; this is especially true of forms that are designed to be printed and filled out by hand but that could also be filled out on screen. PDFpenPro's Create Form Fields command is perfect for such forms.

For example, consider the word processing document shown in **Figure 65**, a job application that contains only lines and checkboxes. It can be saved as a PDF (see [Print to PDF](#)) and brought into PDFpenPro, where the static form elements can be brought to life.

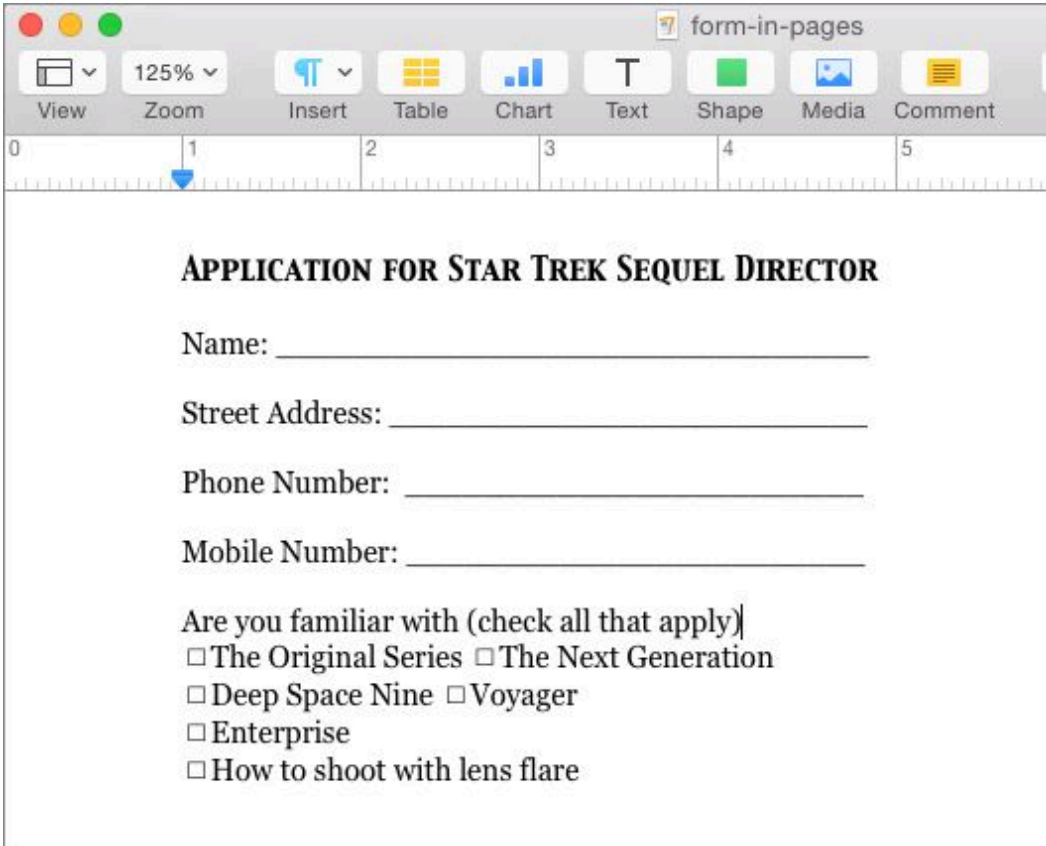
The image shows a screenshot of a word processing application window titled "form-in-pages". The window has a standard macOS-style title bar with red, yellow, and green buttons. Below the title bar is a toolbar with icons for View, Zoom (set to 125%), Insert, Table, Chart, Text, Shape, Media, and Comment. A ruler is visible at the top of the page, showing page numbers 0 through 5. The main content area contains a form titled "APPLICATION FOR STAR TREK SEQUEL DIRECTOR". The form includes several text input fields: "Name:", "Street Address:", "Phone Number:", and "Mobile Number:". Below these fields is a section titled "Are you familiar with (check all that apply)" followed by five checkboxes: "The Original Series", "The Next Generation", "Deep Space Nine", "Voyager", and "Enterprise". The last checkbox is "How to shoot with lens flare".

Figure 65: Start with a form created in a word processor (in this case, Apple's Pages) and saved as a PDF.

To turn the static form elements on the current page into interactive elements, choose Edit > Create Form Fields for Page.

Tip: To turn static form elements into interactive ones throughout a multipage document, hold down Option and choose Edit > Create Form Fields for Document.

Figure 66 shows the result of running the Create Form Fields for Page command on the PDF created from the document in **Figure 65**.

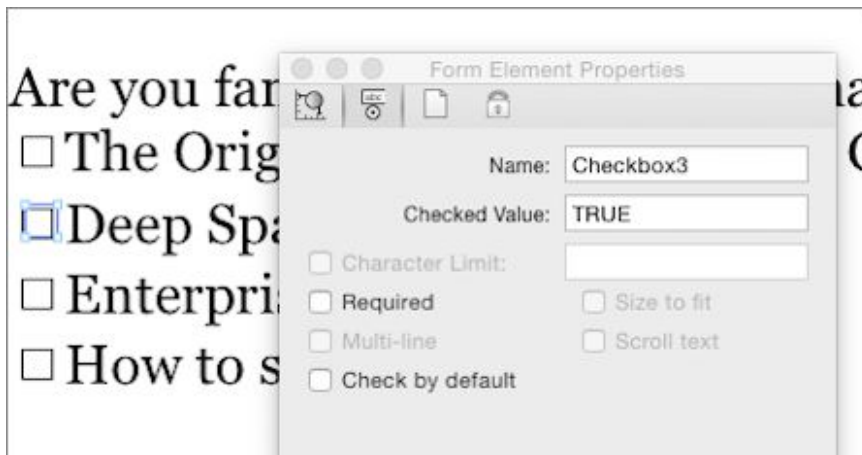


Figure 66: This is a portion of the “automagically” created form, along with the Inspector showing the details for one of the form elements.

PDFpenPro examines the PDF for line and box elements and uses those to generate interactive form elements that overlay the static ones found in the PDF. PDFpenPro proceeds from left to right and top to bottom so that in most cases the tab order for the created elements matches what most users will expect, but if it doesn’t produce the tab order you want, you can change it (see [Set the Tab Order](#)).

In addition, PDFpenPro turns on highlighting of form fields when it creates a form automatically so that the newly created elements are immediately obvious. You can turn form highlighting on and off by choosing View > Highlight Form Fields; this command works with forms that you create by hand and with automatically generated forms.

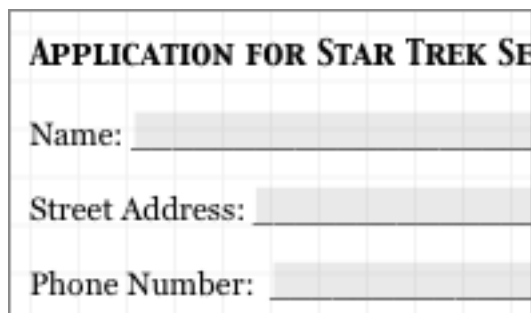
Tip: You can mix things up, too: begin by using a word processor to give you a running start when creating a form, generate the initial form elements automatically with PDFpenPro, and then add any additional form elements you need with the PDFpenPro form tools.

Polish the Layout

It's not hard to slap a bunch of form elements on a page, but you'll get more responses and better ones if you design the form so that it is easy to read and use. At the very least, you should align the elements neatly and label them so that the respondent can see which elements go together, and so that they can figure out what information is actually being requested. The controls on the Inspector's Alignment tab can help you align form elements (see [The Inspector](#)).

Use a Grid

To further help you precisely line up form elements, labels, and any other explanatory text, you can turn on a grid overlay and specify that new items, and dragged items, should snap to that grid (**Figure 67**).



The image shows a screenshot of a form titled "APPLICATION FOR STAR TREK SE". The form has three input fields: "Name:", "Street Address:", and "Phone Number:". A light gray grid is overlaid on the form, with the text and input fields aligned to the grid lines. The grid consists of vertical and horizontal lines that create a grid pattern across the form area.

Figure 67: The grid is visible behind this application form.

To turn on the grid and have items snap to it, do the following:

1. Choose Arrange > Show Grid.
2. Choose Arrange > Snap to Grid.

Set the Tab Order

You should also consider that people with keyboards often prefer to navigate without having to resort to a pointing device. PDFpenPro creates a *tabbing order* for form elements automatically. The person filling out the form can press the Tab key to “tab” from one form element to the next without reaching for a pointing device.

The tab order by default follows the way you read English: left to right, top to bottom.

You can see the tab order, change it, and, if necessary, reset it so it follows the left-to-right, top-to-bottom convention again, with the following commands on the Arrange menu:

- **Show Tab Order:** Small number boxes are superimposed on each element (**Figure 68**) so you can see the order in which you can tab through them.

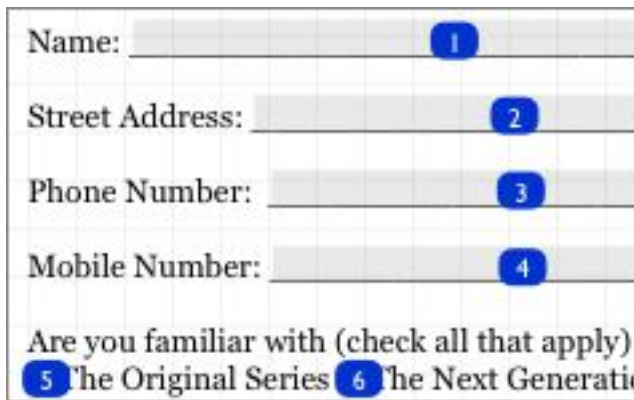


Figure 68: Display the tab order to see where tabbing takes you.

- **Move Forward:** Increase the selected element's position in the tabbing order by one.
- **Move Backward:** Decrease the selected element's position in the tabbing order by one.
- **Move to Front:** Make the selected element the final one in the tabbing order.
- **Move to Back:** Make the selected element the first one in the tabbing order.
- **Reset Tab Order:** Set the tab order to follow English reading convention.

Publish Your PDFs

A PDF that's on your hard drive only is a lonely thing: it wants to go out into the world and meet people. It was *born* to go out into the world. If you love your PDFs, let them go.

You can make your PDFs public (because that's what “publish” means in the broadest sense) in many ways, including:

- Emailing them
- Posting them on the Web
- Printing them on your printer
- Sending them to a professional print service
- Sending them to your publisher as camera-ready copy

With the exception of printing them on your printer, all of these start with saving or exporting your PDF in one way or another.

So let's start there, too.

Save or Export Your PDFs

When you create or modify a PDF with PDFpen, sooner or later you are going to save it. You may not notice that you are saving it: saving is, by default, automatic in PDFpen. That is, you can create a new PDF in PDFpen, edit it, quit PDFpen, and when you open PDFpen again, the untitled-but-edited document reappears even though you never explicitly saved it (unless you've enabled Ask to Keep Changes When Closing Documents in System Preferences > General).

Nonetheless, just because PDFpen saves documents automatically doesn't mean that the traditional command, File > Save, has gone missing. It's still around, and it is key to some saving options.

Here's a brief summary of how saving works in relation to auto-save:

- **Closing a new untitled document:** When you attempt to close a new PDF you've made with PDFpen, you are asked to name the document, choose a location for it, and set some saving options (which I describe in just a little bit).
- **Saving a new document:** When you choose File > Save (Command-S), you get to name the document, specify where it gets saved, and set the options I describe below.
- **Saving a previously saved document:** When you choose File > Save (Command-S), PDFpen saves the document as a separate version to which you can later revert. No dialog or options are presented. To go back to a previous version of the document, use File > Revert To and choose the version you want.
- **Using Save As with a previously saved document:** To save a copy of the document with a new name and in a location of your choice, use the File > Save As command (Command-Shift-Option-S): to access the command, hold down the Option key as you open the File menu. You also get to set your saving options, described just ahead. When you complete this command, PDFpen saves and closes the current document and creates a copy, with its new name, for you to keep working on.
- **Using Duplicate with any document:** Choose File > Duplicate (Command-Shift-S) to create and open an untitled document with the same content as the one on which you were working; the original document remains open. Closing the duplicate elicits the same Save dialog that you see when you close a new untitled document.

No matter how you reach a Save dialog, the options it presents are these:

- **Encryption:** You can secure your PDF at one of several levels of encryption so it can't be casually opened. See [Save Securely](#) for more about this capability, as well as its limits.
- **Quartz Filters:** You can apply a Quartz filter as you save (if you don't know what a Quartz filter is, read [Save with Quartz Filters](#)).

In addition to saving, you can export your PDF to different formats, using the File > Export command in PDFpen and PDFpenPro:

- **Images:** You can export every page in the PDF to a multi-page TIFF document in one of several resolutions (see [Export as TIFF](#)).
- **Microsoft Word:** This export option converts your PDF into a standard old-style Word document (.doc file) or a more modern Word document format (.docx). See [Export to Microsoft Formats](#).
- **Plain Text and Rich Text:** These options export only the textual contents of a PDF. Plain Text strips off all formatting; Rich Text retains characteristics like size, typeface, and typestyle.

Users of PDFpenPro can export documents in these additional formats:

- **Microsoft Excel and Microsoft PowerPoint:** These two export options require an Internet connection and a fully licensed copy of PDFpenPro. See [Export to Microsoft Formats](#) for details.
- **PDF/A:** This PDF format is optimized for archival storage, and requires that PDF documents embed all the components, such as fonts, necessary to faithfully reproduce them. The Wikipedia article on [PDF/A](#) describes it more completely; PDFpenPro currently exports into the PDF/A-1b version of the archive format. Note that PDF/A export requires an Internet connection and a licensed version of PDFpenPro.

Finally, you can save your PDFs from PDFpen by printing them; see [Save with the Print Dialog](#).

Save to Evernote

PDFpen has yet another alternative Save command, one that you might not be familiar with: File > Save to Evernote. Evernote is a cloud-based service that stores notes, photos, and documents, including PDFs. If you use this service, the Save to Evernote feature is very convenient; login to the service at this URL to enable the capability and to find out more: <https://www.evernote.com/Registration.action?code=pdfpen>.

Export as TIFF

TIFF, the aged and venerable Tagged Image File Format, has been a standard for over a hundred years—on the planet Mercury, that is; on Earth it's been around for about a quarter of a century. As you probably already know, TIFF is widely used as a standardized way of storing image files that almost any image application worthy of the name can open.

What you may not know is that TIFF can store multi-page documents, in which each “page” is a TIFF image. If you need to convert your document to an image, or set of images, this option is what you need.

There are a few drawbacks to exporting a PDF as a TIFF, however:

- **TIFFs are not text:** When you save a PDF as a TIFF, you can no longer select its text to copy or edit it. That's because the text becomes just a picture of text. As with any image, you would need to perform OCR if you want to convert the picture of text into editable text again. Needless to say, PDF features like notes and tables of contents don't survive the TIFF conversion either.
- **TIFFs are bulky:** Text, even text stored in a PDF along with its font information, is almost always much more compact than full-page images. For example, a 27-page plain-text typescript I happen to have on hand makes a 74 KB PDF file, but a 170 MB uncompressed TIFF file. Even a compressed TIFF file of that manuscript requires 7 MB: nearly 100 times the size of the PDF version.
- **TIFF has size limits:** The TIFF standard supports a maximum file size of 4 GB. While that might seem like a lot, remember what you just read above—TIFF files are bulky. It is quite possible to reach this limit when saving a book-length PDF as a TIFF file.
- **Multi-page TIFFs are unusual:** Not all software that can display a TIFF knows what to do with multiple images within a single TIFF file. That may cause confusion and consternation for recipients.

PDFpen offers three TIFF options under the Export To pop-up menu in the Export dialog when you choose File > Export:

- **TIFF (Print, 300 dpi):** Use this when you need to send a document to a print service, and the print service wants to deal only with plain unadorned image files and doesn't want to hassle with fonts and all the other stuff that can make printing other people's files so much excruciating fun. A resolution of 300 dpi isn't all that high, of course—modern home laser printers snicker at it, and it's an even lower resolution than that of the iPhone Retina display—but it's high enough that all but the most eagle-eyed will find it nice and sharp.
- **TIFF (Fax, 200 dpi):** Use this when fax quality is good enough. If you need to send a document via fax, this is the perfect format to store it in: most fax modem software and online fax services can handle TIFF files.
- **TIFF (Web, 72 dpi):** This choice produces the most compact TIFF files, and is quite good enough for viewing online. Just don't expect to magnify a page beyond its normal size without seeing lots of fuzzy pixels.

Export to Microsoft Formats

Yes, as [Edit a PDF](#) makes abundantly clear, PDFpen is fully capable of editing PDFs. However, you'll never confuse PDFpen for a word processor, nor are PDFs, as you learned way back in [Learn about PDF Files](#), designed with editing in mind. Nonetheless, sometimes a PDF needs more extensive editing than is feasible in PDFpen. Or maybe you need to extract the contents of a PDF to use in a word processing document, spreadsheet, or presentation.

When you choose File > Export, the Export To menu in the dialog offers two Word file format choices. If you use PDFpenPro, you also see three other Microsoft format choices: two for Microsoft Excel, and one for PowerPoint.

Here's what the choices mean:

- **Word 2007 Document (DOCX) and Word Document (DOC):** Choose the first of these if you plan to edit the document with a recent version of Microsoft Word; choose the second to edit it with an older version of Microsoft Word, or to send the file to others but don't know what versions of Word they have. Note that you can edit documents in either Word format with Apple's Pages, though Smile recommends the Word 2007 format for best results.
- **Excel 2007 Spreadsheet (XLSX) and Excel Sheet (XLS):** Similar to the Word formats, the first of these is for more recent versions of Excel and the second for older versions. Excel export is intended for documents that consist primarily of spreadsheet-like data; that is, rows and columns of text and numbers. Smile recommends using the Excel 2007 Spreadsheet (XLSX) format if you intend to open the exported document with Apple's Numbers app.
- **PowerPoint 2007 Presentation (PPTX):** This format works best for PDFs that consist of landscape-oriented pages each containing a few items in large type, and with a background image or color. The exported files can also be opened in Apple's Keynote app.

Note: Smile provides more details about PDFpen's and PDFpenPro's Microsoft format exports on its [Word Export page](#), along with examples and tips for using the export options.

The Microsoft export options require an Internet connection: PDFpen securely transmits your PDF to the Nuance OmniPage Cloud Document Conversion Service for conversion. Depending on the size of the PDF to be converted, this can take only a few seconds or several minutes. PDFpen presents a dialog showing how long it estimates the conversion will take. Although you can work on other PDFs in PDFpen while conversion is occurring, you cannot work on the document being converted until the process concludes.

Note that the conversion service, while quite good, is not perfect: between the complex internal structure that PDFs can have, and the

ways in which the Microsoft apps lay out their documents, you probably won't end up with an exported document that looks exactly like the original PDF. Nonetheless, the results are usually remarkably good.

Is Submitting PDFs to an Outside Service Safe?

In this case, the answer is "pretty safe"—the conversion service uses a secure connection for transmitting and receiving files, deletes its copy of the PDF as soon as the conversion is complete, and retains the converted copy for only 12 hours. The service is also used by many legal firms, and you know how picky lawyers can be.

Save Securely

The PDF standard supports file encryption that you unlock using a password as the decryption key. This user password, in theory, prevents anyone without the password from opening the PDF. In practice, of course, PDF encryption can be cracked by those with the right tools and the determination. Nonetheless it's still worthwhile to apply a user password to a PDF that you don't want just anyone to be able to open.

In PDFpen's Save dialog, you can choose a level of encryption ranging from None to Strongest. This last, obviously, is the hardest to crack, but is also the least compatible with older PDF-viewing software.

If you choose an encryption level higher than None, you then give the file a user password (twice, for verification purposes). From that point on, each time you try to open the file, you must provide the password—but more to the point, anyone else who tries to open the PDF file must enter it, too. (The topic of how best to share a password for gaining access to sensitive documents is beyond the scope of this book.)

Warning! Choose a good password. A 2- or 3-character password is easy to crack; a 16-character password with upper- and lowercase letters, symbols, and numbers is much more difficult. Not that the NSA might not be able to crack it, given time, but it should be good enough for all but the most security-minded users. Just don't forget it, or you are out of luck! (For much more about passwords, check out Joe Kissell's [Take Control of Your Passwords](#).)

Protect Your PDFs (Pro Feature)

The PDF standard offers permission controls that can, for example, restrict users from printing or editing a PDF. The standard version of PDFpen respects the permission controls on PDFs that it opens, but it provides no capability to apply them to new PDFs. However, PDFpenPro has an Inspector pane (**Figure 69**) that does allow you to apply permission controls to a PDF; these permissions can be overridden only by supplying an owner password (as distinct from the encryption-related user password described just previously).

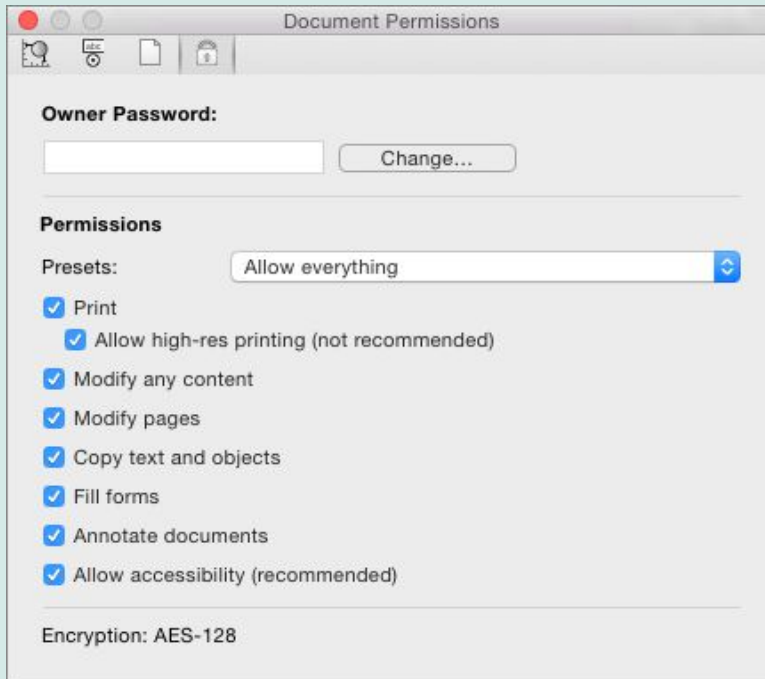


Figure 69: You can set any combination of these permissions.

For example, if you set a PDF’s permissions to prohibit printing, others can still open your PDF, but when they try to print it, they’ll first have to enter the owner password—without it, they can only view it onscreen.

Alas, just about every lock has a locksmith, and you can readily find programs for sale that can strip permission restrictions from a PDF blithely. However, just because someone can smash in a locked door is no reason to prop the door open: if you need to set up ground rules for how a given PDF is to be used, the Document Permissions feature in PDFpenPro gives you that capability.

Save with Quartz Filters

Quartz is the name Apple uses for one of the key graphics services of OS X. Quartz has several separate components for different purposes—onscreen compositing of animation, for example—but the Quartz 2D component is tailor-made for dealing with PDFs. In fact, Quartz itself was originally based upon PDF.

Because of the close relationship between PDF and Quartz, developers can create filters that modify the look or structure of a PDF document in various ways. I won't detail all of the available Quartz filters as there's no telling which ones you have on your Mac (anyone can make a Quartz filter with the ColorSync utility that comes with OS X).

However, here are a few standard ones that you might find useful:

- **Black & White:** This filter removes all color information, leaving you with a grayscale document in one simple step. You might use it if your document will be printed on a grayscale device. See [Resample an Image](#) for more about grayscale.
- **Reduce File Size:** This reduces the quality of all images in the file to medium-quality JPEG. If you need a smaller file more than you need highest quality images, use this filter.
- **Create Generic PDFX-3 Document:** *PDF/X* is a subset of the PDF specification, designed to facilitate the use of PDFs in pre-print environments. Among other things, the format specifies that the document must embed all of the fonts that are used within the document. (If you want to know more about PDF/X and its reason for being, you can start with the [summary by Laurens Leurs](#).)

I encourage you to explore the Quartz filters—on copies of files, of course: never, ever experiment with originals!

Warning! Although Quartz and PDF are closely related, saving a file with a Quartz filter can result in some data loss. In particular, if you have a table of contents in your PDF, a Quartz filter discards it. Also, you can't save a file with a Quartz filter and secure the file with a password at the same time.

Save with the Print Dialog

There's one somewhat unusual way to save your PDF that doesn't involve a Save command on the File menu: you can choose File > Print, and then click the PDF button at the lower left of the Print dialog. This button pops-up a menu of PDF-related choices (**Figure 70**).

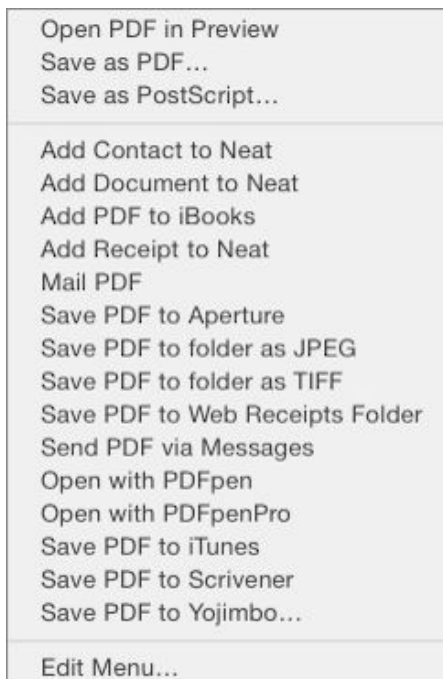


Figure 70: The Print dialog provides many choices under the PDF button.

The menu shown in **Figure 70**, above, almost certainly doesn't look like yours beyond the first three standard items. The other items are *workflows*, automated tasks you can create with Automator, a standard part of OS X.

Tip: You don't need to use the Mail PDF workflow in the Print dialog's PDF menu to email a PDF from PDFpen. Instead, you can choose File > Mail Document to attach your PDF to an email message in your default email program.

Warning! Saving a PDF with a workflow strips annotations and tables of contents from the PDF.

Workflows can end up in this menu in several ways. One way is when you run an application that installs its own workflows; another way is for you to run an installer that adds them.

The Open with PDFpen workflow, for example, can be installed with the free Install PDFpen Workflow app that you can [download from Smile](#). Once you've installed the workflow, it's available from the Print dialog's PDF menu in other programs on your Mac. Building a Numbers spreadsheet that you want to turn into a PDF and modify with PDFpen? Print the spreadsheet and choose Open in PDFpen from the PDF menu: in seconds your spreadsheet is in PDFpen, available for editing.

Where Are Workflows Stored?

The workflows that appear on the PDF menu are stored in one of two locations. One location is in your Home folder's Library: `~/Library/PDF Services/`. That's where the Install PDFpen Workflow app puts its workflows. The other is `/Library/PDF Services/`.

As always when it comes to a Library folder—either your Home folder's Library or the main Library for your Mac—don't mess directly with the files in it unless you know what you're doing. Really, I mean it. I'm watching you.

As the final item on the menu, Edit Menu, might lead you to think, you can create your own workflows and add them to this menu. Automator has a special template for creating PDF workflows that appear in the Print dialog: Print Plugin. This workflow receives PDF files from the print system and performs the Automator actions on it that you specify. Automator has more than a dozen actions designed to act upon PDFs.

When you choose the Edit Menu command on the PDF menu, you see the dialog shown in **Figure 71**. Use this dialog to add any Automator workflows that you create to the PDF menu. You can also use it to remove any workflows you don't want.

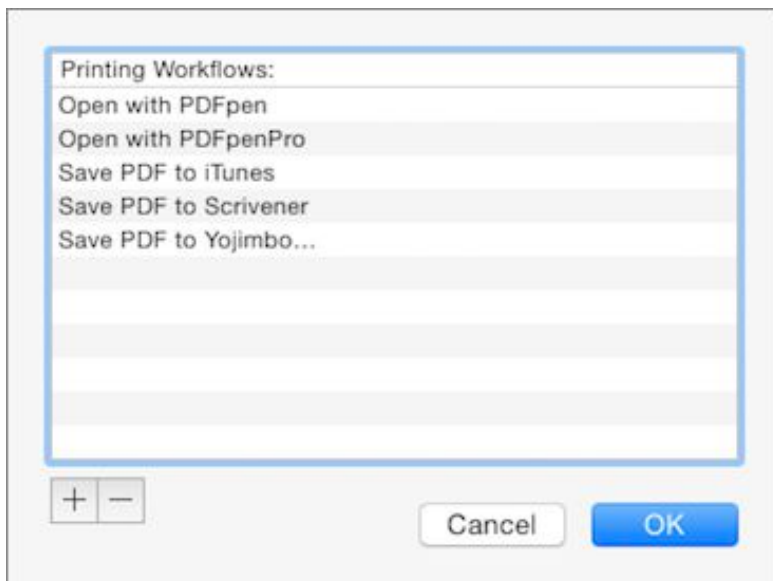


Figure 71: Add or remove workflows from the PDF menu in the Print dialog here. Choose Edit Menu from the PDF menu to bring it up.

Print Your PDFs

Earlier in this book, in [Print Notes and Comments](#), I described the note- and comment-related print options PDFpen offers. **Figure 72** shows all the PDFpen options in the Print dialog (you may have to click a Show Details button in the dialog to reveal them).

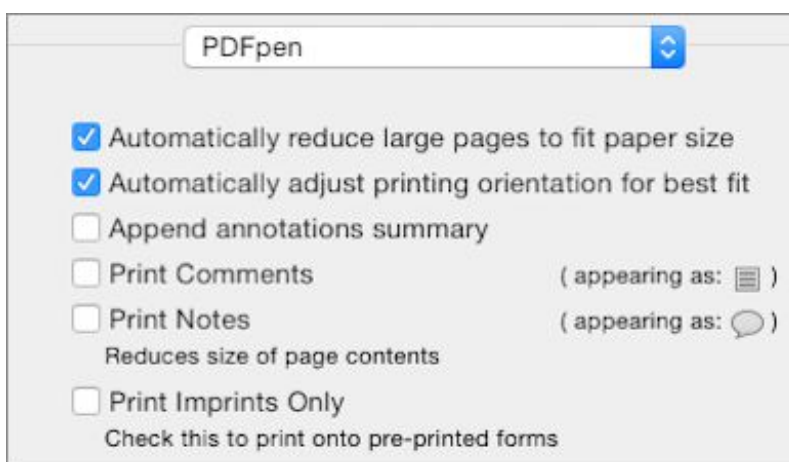


Figure 72: In PDFpen, choose File > Print to access these options.

Most of these options require no explanation, or I've already described them elsewhere (for example, [Automatically Adjust Printing Orientation for Best Fit](#) comes up in [Rotate a Page](#)). But [Print Imprints Only](#) deserves a little discussion.

In [Fill Out a Non-interactive Form](#) I described how to place text and images (such as check marks and signatures) on a form in a PDF. The text and images you create to do that are *imprints* (recall that any text objects, graphic objects, or images you add to a PDF with PDFpen are imprints). If, for some reason, you need to print that information on a pre-printed form (for example, the form may include a watermark or other security features), you can load that pre-printed form in your printer and use the Print Imprints Only feature to have PDFpen print *only* the imprints contained in the PDF file. A specialized feature, I'll grant you, but for those who need it, a very useful one.

Tip: You might also find the Append Annotations Summary option useful. When it's checked, PDFpen adds one or more pages to the printed output with a list of all the annotations and imprints you have added to the PDF, including each imprint PDFpen creates when you correct text in the PDF.

Use PDFpen in iOS

If you've read the rest of this book, you should have a pretty good idea of what PDFpen can do on a Mac. You'll be pleased to know that PDFpen for iPad & iPhone provides most of the same PDF-manipulating capabilities as its Mac sibling. However, the first time you open PDFpen for iPad & iPhone, you're likely to say, "Hmm... this looks...*different!*"

Of course it does. Any app rebuilt for a mobile device you control with your fingertips—instead of with a traditional pointing device and keyboard combination—can't help but undergo a sea change into something rich and strange. Nonetheless, the rich and strange app you see really is PDFpen. After a few minutes with it you'll recognize your old friend in its new guise.

Much of what I've said about PDFpen's tools and capabilities elsewhere also applies to PDFpen in iOS, and throughout this chapter I refer you to the relevant sections of this book for those details. This chapter addresses the two most common concerns that people have upon first diving into the strange richness of PDFpen for iPad & iPhone: where to find tools and commands (discussed just below) and the myriad ways to [Get PDFs in and out of PDFpen in iOS](#).

Find Tools and Commands

Because screen real estate is limited on iPads, and even more so on iPhones and iPod touches, you won't see an ever-present toolbar or Editing Bar in PDFpen for iPad & iPhone. Instead, these both come and go depending on whether you need them or not.

Take the toolbar: although PDFpen for iPad & iPhone displays its toolbar (**Figure 73**) when you open a PDF, just tap the screen and it goes away. It remains hidden as you page through the PDF so you can see as much of the document as possible.

To bring the toolbar back, tap the screen again.

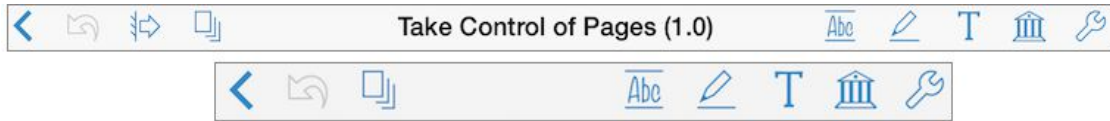


Figure 73: The toolbar in PDFpen for iPad & iPhone hides when you don't need it (top, the iPad toolbar; bottom, the more compact iPhone version).

Similarly, the Editing Bar, and, for that matter, all the other controls and options in PDFpen for iPad & iPhone, show up when you need them and go away when you don't.

In addition, the multi-touch interface in PDFpen for iPad & iPhone provides some gestures that affect the way you interact with documents and objects:

- **Zooming:** Instead of a View menu, you use the standard pinch and reverse pinch gestures to zoom in and out. Also, a quick double-tap on a zoomed-in page zooms out to show the whole page.
- **Selecting:** Instead of clicking an object to select it, you tap it. To select text, you touch and hold a word briefly until it is selected, and then drag the selection controls to extend or reduce the selection.
- **Scrolling:** Rather than use scroll bars or page-up and page-down keys to go from page to page, you swipe left to go to the next page in a document and right to go to the previous page.

With those general tips out of the way, read on to find out where PDFpen for iPad & iPhone has stashed its tools and commands.








Navigation Tools

You can find the navigation tools on the left side of the toolbar (see **Figure 74**).



Figure 74: The navigation tools live on the left side of the toolbar in PDFpen.

Here's a brief description of what these tools provide:

- **Back** : Tap this button to save the current document and return to the Document Manager screen. Read the next section, [Get PDFs in and out of PDFpen in iOS](#), for more about accessing documents.
- **Undo** : Use this button to undo the most recently performed change. You can tap multiple times to undo a series of recent changes. Why is this classed as a navigation button? It makes sense if you think of it as providing a way to travel back through time.
- **Show Sidebar**  and **Hide Sidebar** : These buttons appear only on the iPad. Tap Show Sidebar  to reveal [The Sidebar](#), with its thumbnails that you can tap to move quickly through a document. Tap Hide Sidebar  to dismiss it. Though you don't have these buttons on the iPhone, you do have a sidebar—swipe right from just beyond the left edge of the screen to show it and drag the sidebar to the left to hide it (these gestures also work on the iPad).
- **Thumbnails** : Tap this to see thumbnails, with page numbers, of the pages that comprise your entire document. The Thumbnail view is powerful; I describe it next.

Thumbnail View

At its simplest, the Thumbnail view (**Figure 75**) is an easy way to get to any page in your PDF quickly: just tap the thumbnail of the page you wish to view.

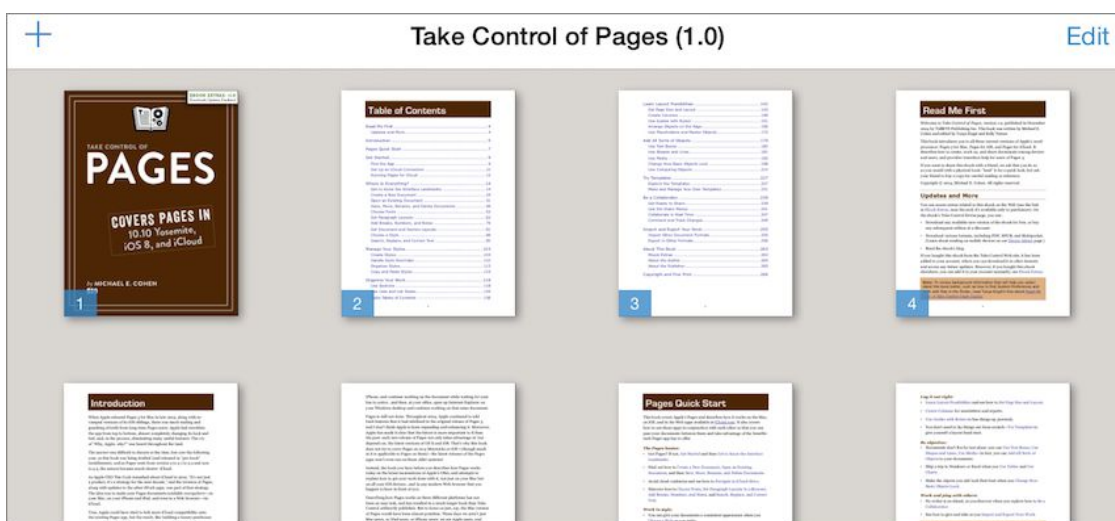


Figure 75: Tap a thumbnail in Thumbnail view to go to that page.

However, its power is revealed when you tap Edit to see its various editing options appear in the toolbar (**Figure 76**).

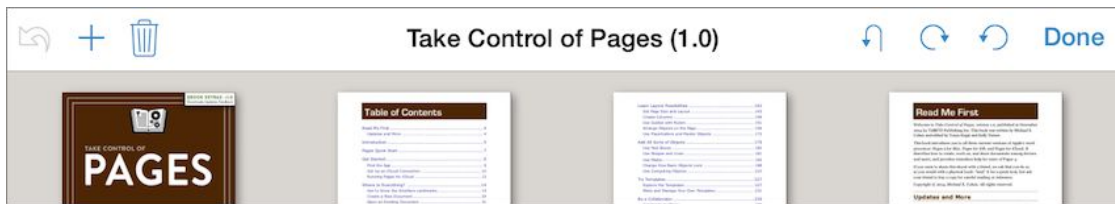








Figure 76: The Thumbnail view editing options give you control over the pages in your PDF.

With the editing options visible, you can select one or more thumbnails by tapping them, and then drag selected pages to move them in the document. You can also do the following with selected thumbnails:

- **Delete pages:** Tap the Delete  icon to remove the thumbnails you have selected and the pages they represent; you have to confirm the deletion.
- **Rotate pages:** By tapping the appropriate icon you can flip selected pages 180 degrees () , 90 degrees clockwise () , or 90 degrees counterclockwise () .

You can add a page to your document—either blank, lined, with a graph-paper grid, or from a photo in your device’s Photos collection—by tapping the Add  button and then tapping an option in the popover that appears. New pages are added to the end of the PDF. You also have the option of duplicating the selected pages in the Thumbnail view, or creating a new document from them.

Note: The Add  button also appears in the main Thumbnail view, allowing you to add new pages to your PDF without first tapping Edit.

Tap Done to dismiss the thumbnail-editing toolbar and return to the main Thumbnail view. Then, to return to viewing and working on individual pages in your document, tap the thumbnail for the page you want to view or work on next.






The Sidebar

The sidebar in PDFpen for iPad & iPhone provides four different ways of navigating your PDF (**Figure 77**). Tap an icon at the sidebar's top to change what it displays. Tap an item in the sidebar to navigate to that item in the PDF.



Figure 77: Tap an icon at the top of the sidebar to change what it displays.

Here are the four sidebar views:

- **Thumbnails:** Tap the Thumbnails  icon to see numbered page thumbnails.
- **Search:** Tap the Search  icon to see a search field at the top of the sidebar. Type in the search field to see a list of hits.
- **Table of Contents:** A tap of the Table of Contents  icon displays the top-level headings of the PDF's table of contents (if it has one). Tap the information  icon to the right of a heading to see its subheadings.
- **Annotations:** Tap the Annotations  icon to list the annotations you have made in the PDF. An icon to the left of each entry tells you what kind of annotation it is (**Figure 78**).

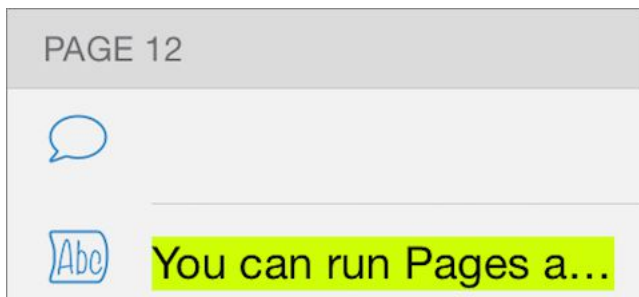



Figure 78: The icon beside each annotation listed in the sidebar indicates the type of annotation; listed here is one (empty) note and one highlighted passage.

Editing Tools and Other Commands

The editing tools—and many of the other commands you know from PDFpen on the Mac—can be found by tapping the buttons on the right side of the toolbar (**Figure 79**). The toolsets, in left-to-right order, are the Highlight tools, the Drawing tools, and the Text tools. These are followed by the Library (see [The iOS Library Popover](#)), and the Tools icon; this last produces a popover containing an assortment of commands (see [The iOS Tools Popovers](#)).








Figure 79: The right side of the toolbar is where many tools and commands live.

Tap any of the first three icons to bring up the Editing Bar, which shows the tools in the currently selected toolset along with tool-specific options (see [The iOS Tool Options](#)). To close the Editing Bar, tap the Close  icon that appears at its right.

Note: To conserve screen space, the Editing Bar on the iPhone shows only the current tool icon; tap it to access a popover showing the other tools in the currently selected toolset.

The iOS Highlight Tools

The Highlight  tools comprise a set of tools similar to the ones described in [Highlight Text](#): a Highlight Text  tool, an Underline  tool, a Strikethrough  tool, and a Squiggle  tool.

Tap the Highlight tools icon to see the Editing Bar with the most recently used Highlight tool selected (**Figure 80**).



Figure 80: The Highlight tools appear on the Editing Bar with the most recently used tool selected (here, the Highlight Text tool is selected).

The iOS Drawing Tools





The Drawing tools (**Figure 81**) are made up of tools that correspond to those described in [The Drawing Tools](#) along with the Scribble  tool described in [The Markup Tools](#).



Figure 81: The Drawing tools offer similar capabilities to those offered by their Mac counterparts.

Like the Highlight tools, when you tap the Drawing tools icon, the Editing Bar shows the most recently used Drawing tool selected.

The iOS Text Tools

The Text tools (**Figure 82**) correspond to three of the tools described in [The Markup Tools](#): a Text  tool for creating imprints, a Comment  tool for creating comment boxes, and a Note  tool for placing note icons, with their associated pop-up note windows, on the page.

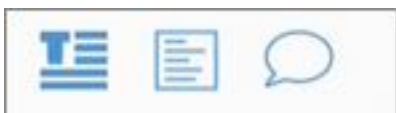


Figure 82: Use the Text tools to add text imprints, comments, and notes to your PDF.

The iOS Tool Options

Each tool you select provides one or more tool options that appear as icons in the center of the Editing Bar (**Figure 83**). They are used for setting colors, fonts, line styles, and so on.

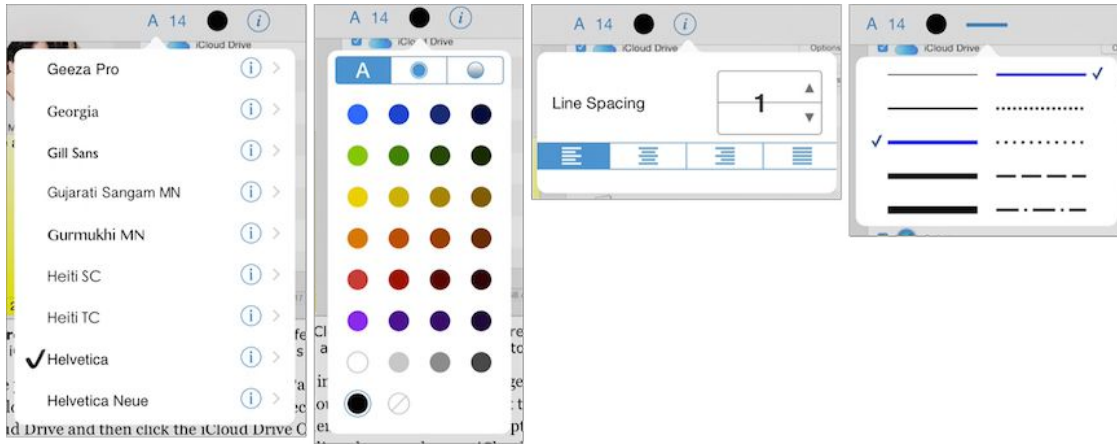



Figure 83: The tool options vary by tool. The first three sets of options shown above are provided by the Text tool and, starting from the left, allow you to choose a font, text color, and line spacing and text alignment. The rightmost popover shown above, provided by the Comment tool, sets border width and border line style.

An additional tool option can be found on the Editing Bar when you use any Highlight tool or the Scribble tool: the Palm  tool. When you tap this tool, overlays temporarily protect most of the screen against touches (**Figure 84**) that can occur when you draw with your finger or a stylus and your palm accidentally brushes the screen.

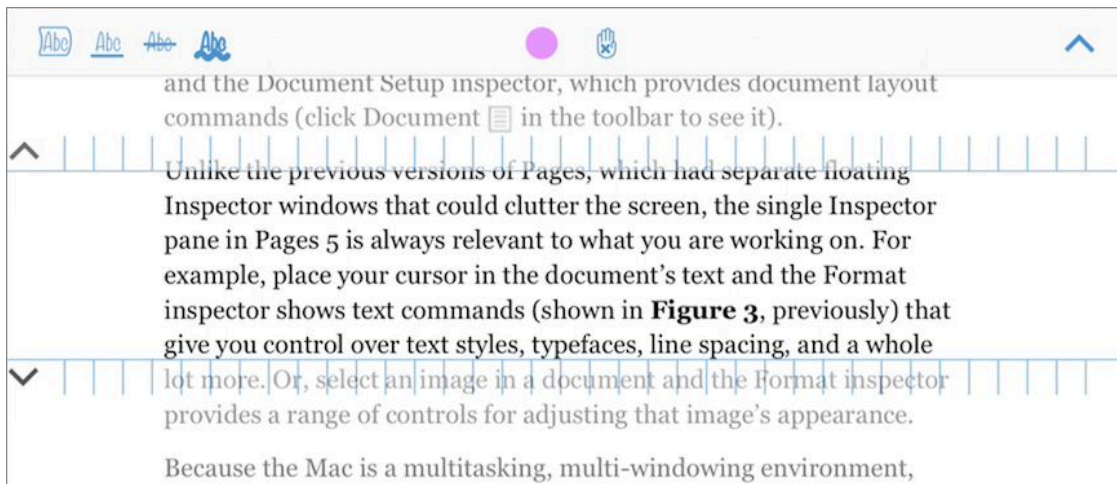






Figure 84: The Palm guard is active: only screen touches in the unguarded area between the two overlays affect the document.

To move the protection overlays, drag their arrow   icons.

Note: Palm protection automatically ends after a few seconds of inactivity. To manually dismiss the protection, tap the Palm  tool again, or drag the top and bottom overlays together.

The iOS Library Popover

Like its Mac siblings, PDFpen for iPad & iPhone offers a Library with collections of objects that you can add to a PDF (**Figure 85**). To see the popover, tap the Library  icon on the toolbar. The Library's contents are similar to those described in [The Library](#), though there are some differences.

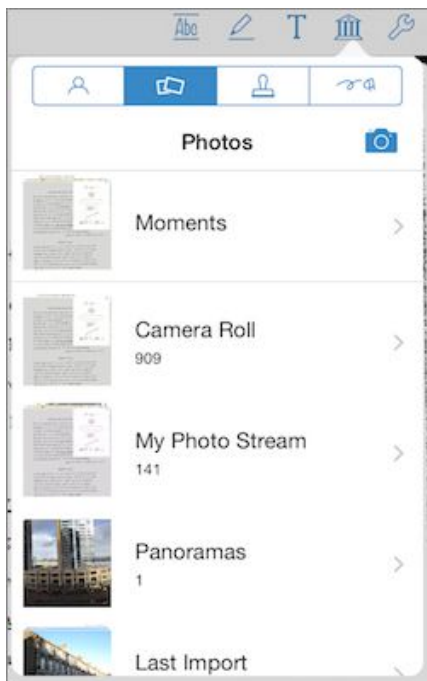




Figure 85: The PDFpen Library popover in iOS offers features similar to those in the PDFpen Library on the Mac, but there are some differences, such as the Photos collection, shown here.

Here's what you can find in the PDFpen for iPad & iPhone Library:

- **Custom** : As on the Mac, this collection contains objects that you might want to place on a page in the future: text imprints, graphic objects made with the drawing tools, comments, and images. To add an object to the Custom collection, select the object in the PDF and then tap the Custom collection's Add  button. Tap the Edit button to rearrange the items in the collection or to delete items from it.

Note: If your Mac copy of PDFpen was purchased from the Mac App Store, your PDFpen Library on the Mac and on iOS can synchronize their Custom collections via iCloud. See [Smile or Mac App Store](#).

- **Media** 📷: Tap this to browse the Photos library on your iOS device—select a photo to add it to a PDF. Tap the Camera 📷 button to take a photo with your device’s camera and add that photo to the PDF. Tap the Info button in the Editing Bar when you add a picture to a PDF to adjust its transparency and its layer order among any other drawn objects and imprints (annotations like comments and notes always display above such objects).
- **Stamps** 📄: In this collection you’ll find the various types of business stamps and stickers as in PDFpen on the Mac.
- **Proofreading Marks** ✎: The proofreading marks in this collection mirror the ones available on the Mac; swipe left and right to view them all.

The iOS Tools Popovers

Yes, popovers, plural. There are two versions (**Figure 86**): one on the Documents screen’s toolbar, and the other on the document editing toolbar. Tap the Tools 🛠 icon on each toolbar’s right side to see it.

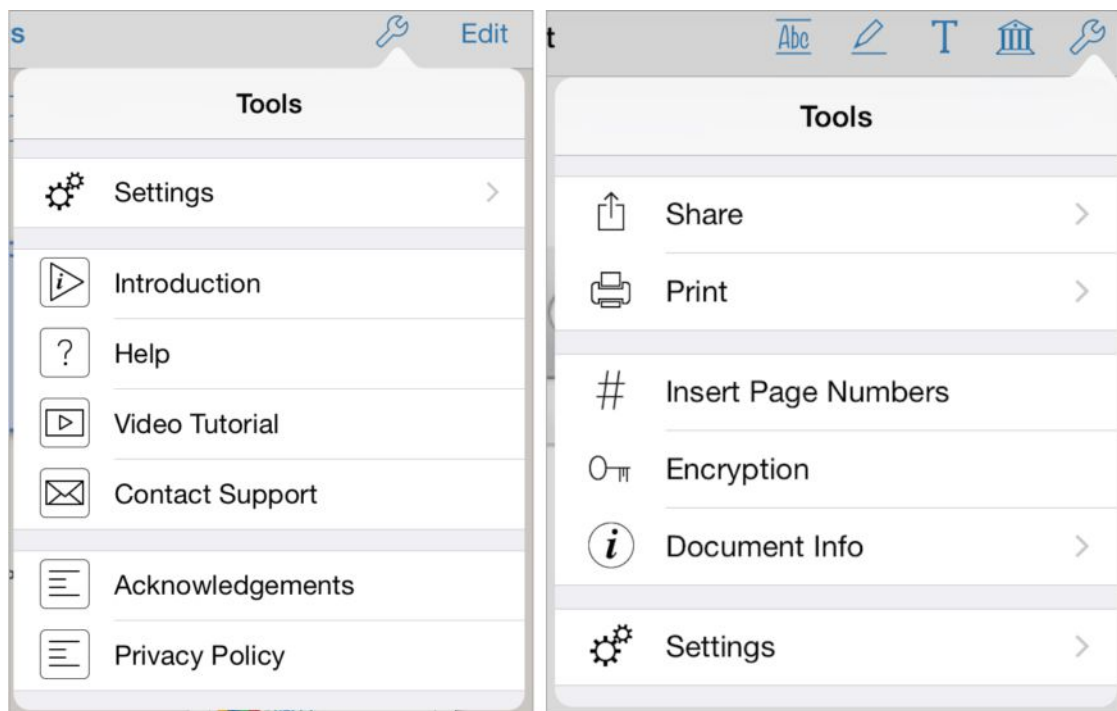


Figure 86: The Tools popover offers different options on the Documents screen (left) and on the PDF editing screen (right).

The Tools popover on the Documents screen is where you go to configure PDFpen's settings (described in [The iOS Settings](#)), to contact Smile for support, and to view help.

Tip: Spend some time with the Help and Video Tutorial options available from the Documents screen's Tools popover if you have the chance.

The Tools popover on a PDF editing screen also provides access to PDFpen's settings, but the rest of its offerings pertain to the currently open document:

- **Share:** Here, “share” means to share a *copy*—tap Share to open a copy of the document in other apps; to email a copy; to send a copy to a location in iCloud Drive, or to Dropbox, Evernote, the file-sharing pane for your device in iTunes, and various other remote destinations. You can specify whether the copy has editable annotations, which some PDF viewers may not display.
- **Print:** If your device has access to one or more printers, tap this to print the document. You can specify the range of pages to print and the number of copies.
- **Insert Page Numbers:** Although the layout of the dialog is different, it provides the same capabilities as the [Insert Page Numbers](#) command on the Mac.
- **Encryption:** Use this to encrypt your PDF using one of several encryption standards, ranging from relatively weak to very strong. When you choose to encrypt a PDF, you must specify a password, and you must enter that password each time you open the document. Keep in mind that some of the available encryption standards are incompatible with some PDF viewers; generally, the weaker the encryption used, the more compatible the document is with other PDF viewers.
- **Document Info:** Tap this to see the same information provided by the Document Information tab described in [The Inspector](#).

The iOS Settings

The Settings popover, accessed from the Tools popover described just above, provides configuration options for the PDFpen iOS app (**Figure 87**). It's also a quick way to find out which version of the app is currently installed.



Figure 87: Use this popover to set app-wide configuration options.

Note: The iOS Settings app also has an entry for PDFpen, but it merely contains a few switches to permit PDFpen to access your device's features, such as the camera or cellular data.

Here are the available Settings options:

- **Annotation Author:** Tap this to enter the name with which your annotations are labeled.
- **TextExpander:** If you use Smile's [TextExpander touch](#) app, enable this to use your TextExpander snippets with the standard iOS keyboard instead of having to switch to the custom TextExpander touch keyboard.

- **Update Snippets:** If you use TextExpander touch and make changes to your snippets, tap this option to update the snippets available in PDFpen to include those changes.
- **Stylus:** Use this option to set up a pressure-sensitive stylus to use with PDFpen. The app supports several such styli.
- **iCloud:** Enable this option to store your PDFpen documents in iCloud instead of locally on your device. See [Use the Documents Screen with and without iCloud](#).
- **Automatically Sync:** This option is for users of the [Dropbox](#) file sharing service. It controls whether PDFpen automatically syncs documents with Dropbox or whether you must do so manually. See [Set Up Syncing Folders](#).
- **Wi-Fi Transfer:** Tap this option to set up document sharing with other devices on your local Wi-Fi network, as explained in [Wi-Fi Transfer](#) a little later.
- **Sign Up for PDFpen Tips:** Tap this and then enter your email address to have Smile send you occasional email messages containing PDFpen tips and related announcements.

Note: Based upon my experience, Smile’s PDFpen Tips mailings really are occasional and don’t inundate your email inbox.

The iOS Context Menu

When you select text or an object in your PDF, a context menu appears above or below the selection (**Figure 88**).

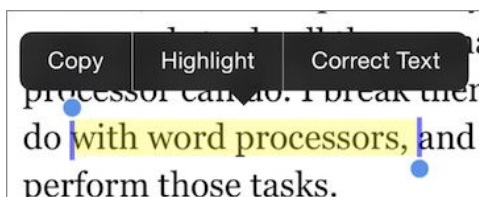


Figure 88: The context menu appears when you select something in the PDF.

The commands available on the menu vary depending on the selected item (that's why it's called a *context* menu). Typically, but not always, this is where you find commands like Copy and Paste. When a single word is elected, you also get a Definition item that, when tapped, looks the word up in your device's built-in dictionary.

Need to Correct Text or Remove a Highlight?

The context menu is the place to go: when you select text in a PDF, you can find the Correct Text item on the context menu. Tap it and you can enter corrections in the imprint that is created for you.

To delete a highlight that you've previously placed on a PDF, touch and hold briefly on the highlight to select it. The context menu provides a Delete item that, when tapped, whisks the highlight away.

Get PDFs in and out of PDFpen in iOS

Pundits and press have often referred to Apple's iOS as a "walled garden" and the metaphor is apt, especially when it comes to apps and their documents. Compared to the open file system on a Mac, for example, in which apps can access documents stored in almost any user folder, and where users can arrange their documents howsoever they like, the iOS file system is almost completely closed. In fact, from a user's point of view, there doesn't appear to be a file system at all.

Instead, each app maintains jealous control over its own documents: when you look at the Documents screen in an iOS app like Pages, for example, you see only those documents belonging to Pages, even though your iOS device may have all sorts of other Pages-compatible documents in their own private storehouses.

Nonetheless, in the following sections, I point out the gaps in the hedges through which you can move documents into and out of PDFpen for iPad & iPhone:

- [Use the Documents Screen with and without iCloud](#): This section covers the walled garden in which PDFpen normally stores

documents, and describes how you can extend its boundaries with iCloud Drive. I use the iCloud Drive capability to share personal PDFs I'm working on between my iPhone, iPad, and iMac.

- [Send and Receive with Open In](#): Look here to find out how to send PDFs to PDFpen from other apps, and how to send PDFs to other apps from PDFpen. This is how I get PDFs into PDFpen from email attachments and Web links, and it's how I put them into my iBooks library or GoodReader when I'm done tweaking them.
- [Use File Servers](#): Find out how to copy PDFs between file servers and PDFpen in this section. For example, when I need to post a PDF on the Web, I use this capability to upload it to my site.
- [Set Up Syncing Folders](#): You can set certain services, such as Dropbox, to sync PDFs automatically with PDFpen for iPad & iPhone; this section provides details and advice. I use syncing folders with Dropbox to collaborate on PDFs with my Take Control colleagues.
- [Share with Your Computer](#): If you don't use iCloud but want to exchange PDFs between your iOS device and your Mac (or even a PC), you can use either iTunes or a direct Wi-Fi transfer, as this section explains. Even when the Internet is down (yes, it can happen), these methods allow me to move PDFs from my Mac to my iPad and back. I don't often use these capabilities but I'm very glad to have them available.

Use the Documents Screen with and without iCloud

Every app that keeps documents has its own name for that mysterious place in iOS where they're kept. In the case of PDFpen for iPad & iPhone, the name is Documents (**Figure 89**).

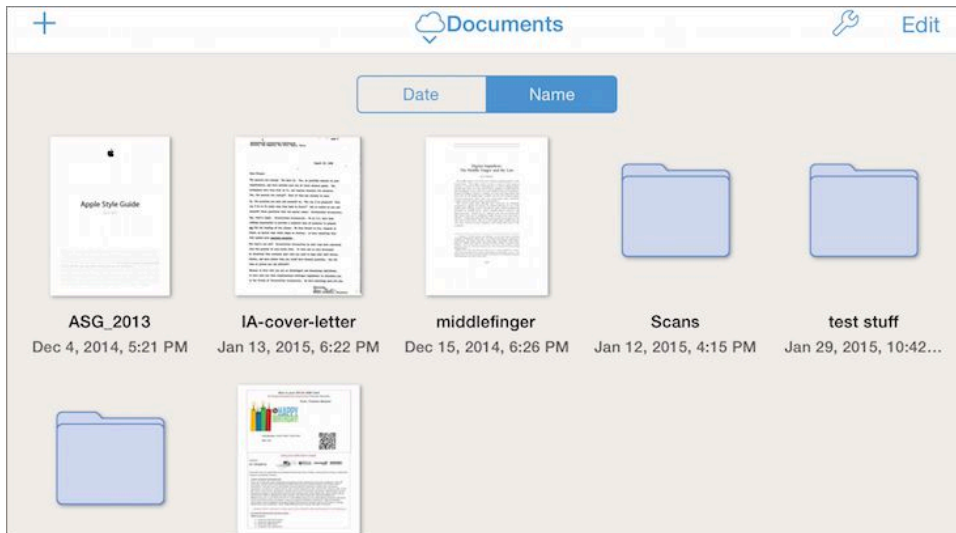


Figure 89: The Documents screen is where you choose documents to edit.

Without iCloud

Absent any other method, to put a PDF in Documents tap the Add Document **+** icon on the toolbar. A popover gives choices for creating a new document or for importing one (**Figure 90**). I describe some of these choices ahead; in particular, see [Use File Servers](#) and [Share with Your Computer](#). Also, Documents is where copies of PDFs go if you [Send and Receive with Open In](#).

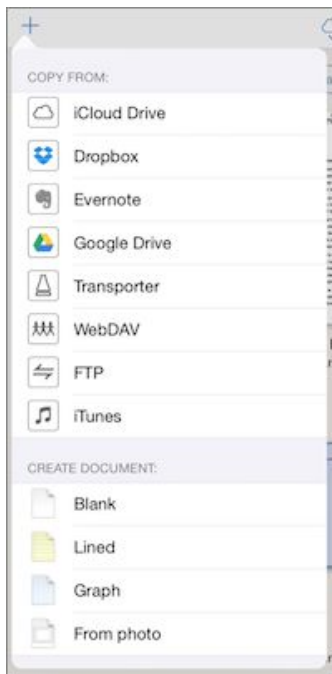



Figure 90: This popover provides a number of sources from which you can add documents to PDFpen.



Without iCloud access, the documents on the Documents screen are as walled-in as they can be: although PDFs can be *copied* in and out of PDFpen, no app other than the PDFpen app running on your device can touch them while they are in there.

With iCloud

With iCloud Drive access enabled for PDFpen, Documents becomes a larger walled-garden, and that garden is now located in the clouds (that is, on Apple's iCloud servers with a local copy on your device).

Here is how you enable iCloud storage in PDFpen (assuming you already have signed in to iCloud on your iOS device; see [Apple's site](#) for iCloud setup instructions):

1. On the toolbar, tap the Tools  icon and then tap Settings.
2. In Settings, under Document Storage, tap the iCloud switch to turn it on.

When you enable iCloud storage, PDFpen for iPad & iPhone syncs all the PDFs in its Documents storage on the device with the PDFpen app library in your iCloud Drive. You may see network activity for a bit as data moves over the Internet. If you have any PDFpen files already stored in iCloud Drive, they appear in Documents along with the PDFs that are already there. If you have no other PDFpen documents in iCloud Drive, the only thing you'll notice other than network activity is that the icon at the top of the Documents screen looks like a cloud  instead of an iOS device .

iCloud Drive becomes more useful if you also have PDFpen on your Mac, since you can access your iCloud Drive storage from it, too. In addition, any other iOS devices that are signed in to the same iCloud account can access those same PDFs with PDFpen for iPad & iPhone.

Although you can share PDFs only within a single iCloud account (which means you're just sharing PDFs with yourself), using iCloud has its benefits: just recently, I had to mark up page proofs from a book project, and, by storing the proof PDFs in iCloud, I could work on them whether I was at my desk or reclining on my couch.

What happens if you turn off iCloud document storage? Nothing too bad: the documents you had in Documents when it was connected to iCloud Drive remain on your iOS device. You can continue to work on them there, though any changes won't be synced to other devices.

Use Folders in Documents

You can create folders in Documents. The process is much the same as when you create folders on the Home screen of your iOS device: drag one PDF thumbnail onto another to create a folder containing both PDFs. After that, you can add PDFs to the folder by dragging them onto the folder. You can tap the folder name to edit it, and you can tap the folder to open it.

When a folder is open, you can return to the top level of Documents by tapping the folder name at the top of the screen. On the menu that appears, tap Documents (**Figure 91**).

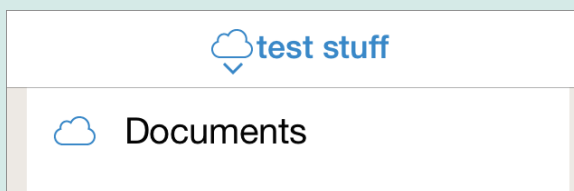


Figure 91: Tap the folder name at the top of the screen to navigate back to Documents.

Moving a PDF out of a folder back to the top level of Documents can be done by dragging a PDF thumbnail to the folder name at the top of the screen and briefly holding it there: when the menu appears, drag down to Documents so it lights up, and then lift your finger to complete the move.


Note that, as with folders on your Home screen, you can't put folders into folders in Documents: two levels is the limit. Also note that the folders you create in Documents appear in iCloud Drive and on other devices connected to the same iCloud account.

Send and Receive with Open In

You can also copy documents from one app to another in the walled garden on your iOS device through a commonly used hole in the hedge: Open In. If, for example, you get a PDF as an email attachment on your iOS device, you can view the document in Mail and then tap

the Open In button. This displays all the apps your device knows about that can handle PDFs: tap the icon for PDFpen and a copy of the document lands in Documents. You have a similar Open In option available when you view a PDF in Safari on your device.


The reverse capability is also true. For example, if you finish prettying up a PDF and want to save it your iBooks library, you can send a copy to iBooks from PDFpen:

1. On the Documents screen, tap Edit at the right of the toolbar.
2. Tap a PDF to select it. (To use Open In, only one PDF at a time can be selected.)
3. Tap the Share  button on the toolbar and, in the popover that appears, tap Open In. An Open In popover appears.
4. In the Open In popover, tap the icon of the app to which you want to copy the PDF. The app opens with your PDF in it.

Keep in mind that this is a copy; if you change the PDF in PDFpen for iPad & iPhone, those changes won't appear in the copied PDF.

Tip: If you have other iOS devices, or a newer Mac that supports AirDrop, you can tap Open In and then tap AirDrop to send a copy to any of those devices when they are on the same Wi-Fi network as your device.

Use File Servers

It's a great big Internet out there, shimmering with all sorts of services for storing and sharing files. PDFpen for iPad & iPhone can access many of them via the Add Document  icon on the toolbar (and it can more fully integrate with one of them via its handy Sync Folders feature, discussed just ahead). If you cast your eye back to **Figure 90**, a few pages previously, you can see them listed in the Copy From section of the popover.

Such document sources usually require a login ID and password or similar credentials for you to access their files. Therefore, the first time

you select a service that requires credentials, such as FTP or Dropbox, PDFpen gives you the opportunity to log in. If successful, you see a dialog with a list of PDFs available for you to add to Documents. If the service has folder hierarchies, you can navigate through the hierarchy by tapping a folder name; **Figure 92** shows a folder deep in my Dropbox hierarchy with an available PDF. When you tap a PDF in the file list, the PDF is copied to Documents.

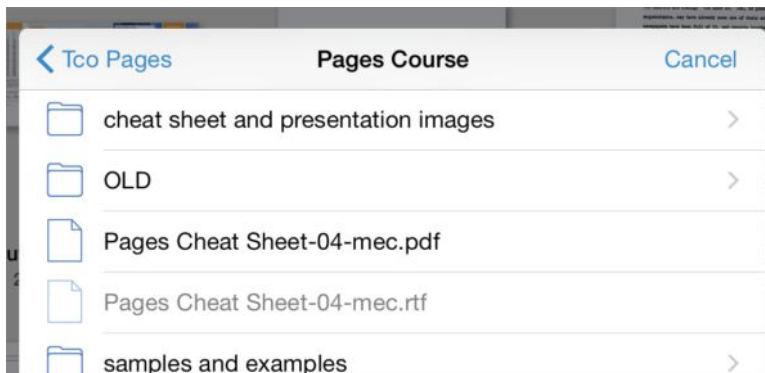



Figure 92: PDFpen shows a list of files and folders on a file sharing service (in this case Dropbox). Only PDFs and folders can be opened in the list.

PDFpen remembers the login credentials for each service to which it provides access, so the next time you access it you don't have to login in again. However, you can tap Sign Out to make PDFpen forget your credentials if you feel insecure leaving the keys to your data in PDFpen's pockets.

Copying an edited PDF from Documents back to an Internet server is similar to the Open In steps described previously:

1. On the Documents screen, tap Edit at the right of the toolbar.
2. Tap one or more PDFs to select them.
3. Tap the Share  button on the toolbar and, in the popover that appears, tap the name of the destination service.
4. To place the PDF within an existing folder, tap the folder in the file-list dialog that appears. Tap Export at the lower right of the dialog to save a copy of the file.

Set Up Syncing Folders

The Dropbox service is designed to be an always-on sharing service: on your Mac, for example, your Dropbox folder is shared with the Dropbox service, so any documents you put into it on your Mac end up on Dropbox's servers while still appearing in the Finder. Those documents are then accessible from any other Mac, PC, or mobile device logged in to the same Dropbox account. You can create something similar in PDFpen for iPad & iPhone with the Sync Folders capability.

If you have an account on such a service, here is how you can set up a sync folder that you can access from Documents:

1. Tap the heading at the top of the Documents screen and then tap Edit Sync Folders in the menu that appears (**Figure 93**).

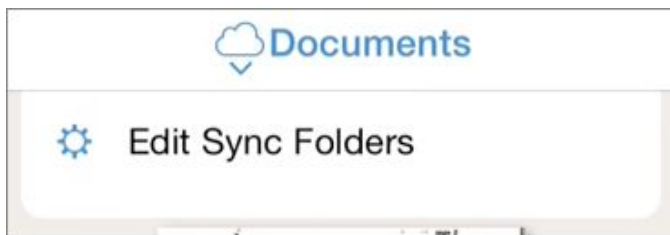


Figure 93: The Edit Sync Folders menu item is your key to managing syncing folders.

2. In the Edit Sync Folders dialog that appears, tap the name of the service from which you want to create a sync folder (**Figure 94**).



Figure 94: Add and remove sync folders in this dialog.

3. In the list of folders that appears, tap the one you want to sync to PDFpen for iPad & iPhone. The folder is added to the menu at the top of the Documents screen.

So long as you have an Internet connection, sync folders keep the PDFs you edit in sync between your iOS device and the service. To see the contents of a sync folder, just choose it from the menu at the top of the Documents screen.

Note: The title at the top of the Documents screen always reflects the name of the folder you are viewing. To return to the main Documents screen, tap the menu at the top of the screen and then tap Documents.

Sync Folders Don't Always Sync Automatically

You can control automatic folder syncing from the Settings pane of the Tools popover: use the Automatically Sync switch to turn syncing on or off for your selected service. Turning off automatic syncing saves bandwidth and can speed things up if you are changing a lot of shared documents and don't want to sync them until you finish.

Some tips about syncing folders:



- **Don't sync everything:** Because syncing copies the contents of a folder to your iOS device, you can quickly exhaust your device's storage if you sync a folder full of large files. I suggest you set up specific folders in your storage service that contain only the PDFs you want to sync with PDFpen for iPad & iPhone (such as the *PDFpen syncing* folder shown in **Figure 95**).



Figure 95: Sync folders appear in the menu on the Documents screen.

- **Make folders within syncing folders:** You can make folders in a syncing folder the same way you can in Documents (described

in [Use Folders in Documents](#)). What's more, syncing folders don't have a depth limit like Document folders do: you can make folders within folders within folders. And you can have empty folders, too.

- **Make sure you're synced:** When automatic syncing is on, PDFpen for iPad & iPhone attempts to sync whenever you have an active Internet connection (you can still edit shared PDFs on your device when you don't have a connection or when automatic syncing is off). You can tell when a shared PDF isn't synced: it has a gray  arrow in the upper-right corner of its thumbnail. You can make a document sync by tapping that arrow, or make the whole folder sync by tapping the Sync  button on the toolbar when you have an Internet connection.

Warning! Watch your data limits. Syncing works both over Wi-Fi and over cellular connections. If you are going to be out of range of a Wi-Fi connection and you have a limited data plan from your mobile service provider, consider doing a full folder sync before you go out on the road and then turn off automatic syncing until you reach a reliable Wi-Fi connection. You can still manually sync a document or folder even when automatic syncing is off.

Keep in mind that you can still access files from other folders in the sharing service even when you have set up syncing folders using the techniques described in [Use File Servers](#).

Share with Your Computer

You can also share PDFs between your Mac and PDFpen for iPad & iPhone using two techniques. The first involves iTunes and the second employs PDFpen's [Wi-Fi Transfer](#) method.

iTunes Transfer

For this method, you work with the File Sharing interface available at the bottom of the Apps pane for your device in iTunes (**Figure 96**).

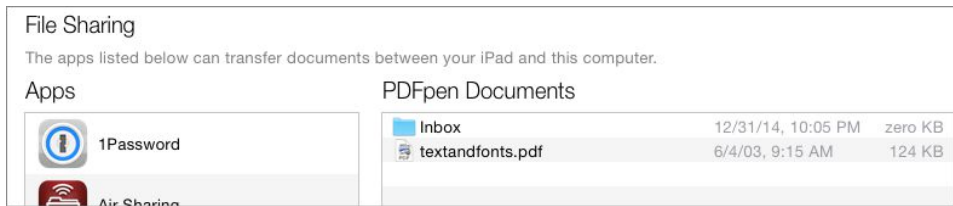


Figure 96: You use the File Sharing area at the bottom of your device's Apps pane iTunes to share files with your Mac.

This capability is available both when your iOS device is connected directly to your computer via USB and when it is connected using wireless syncing.

To move files to your device from your computer, do the following:

1. Make sure your device is connected to iTunes, either via cable or wirelessly.
2. In iTunes, go to your device's settings pane and click Apps under the Settings heading in the sidebar (**Figure 97**).

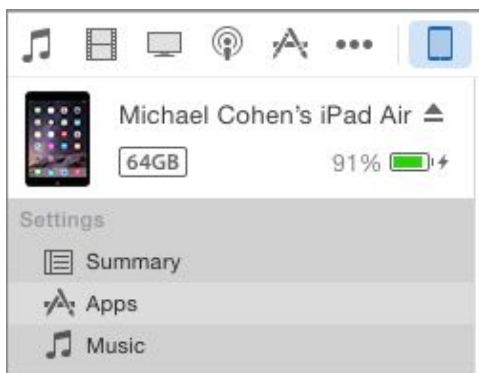


Figure 97: In iTunes, select your device and then click Apps under Settings to get access to the File Sharing area.

3. Near the bottom of the Apps settings pane, in the File Sharing area, click PDFpen in the Apps list.
4. Drag documents into and out of the PDFpen Documents list from the Finder or click the Add or Save To buttons that appear at the bottom of the list.

Documents are moved immediately to a hidden storage area on your device; no need to sync the device. However, it doesn't show up on the Documents screen yet.

To edit a PDF shared this way in PDFpen for iPad & iPhone, tap the Add + button on the Documents screen, tap iTunes in the popover, then tap the file in the iTunes dialog that appears. The file is copied to your Documents screen from the hidden storage area on your device.

To move a document from your device to the File Sharing area in iTunes, use the same techniques for sending a document to a file server with the Sharing button, described in [Use File Servers](#), but tap iTunes in the popover instead of the name of a file server.

Wi-Fi Transfer

You don't have to go through iTunes, though, to move files between a nearby computer (even a Windows computer) and your iOS device: you can share files with any computer on a local Wi-Fi network by turning your iOS device into a temporary Web server on that network:


1. In the Tools popover, tap Settings > Wi-Fi Transfer.
2. Tap the Wi-Fi Transfer switch to turn it on. PDFpen for iPad & iPhone becomes a temporary file server that you can access via a Web browser; the address of the server is listed in the popover (**Figure 98**).



Figure 98: Make your device into a temporary file server.

To move files between your Mac and your device, do the following:

1. Open a Web browser on your computer and enter the address supplied by PDFpen for iPad & iPhone.
2. On the Web page that appears (**Figure 99**), click a file to copy it to your computer, or click the Choose File button at the bottom of the Web page to copy a file to your device.



The screenshot shows the PDFpen for iOS web interface. At the top left is the PDFpen logo, and at the top right is the Smile logo. Below the logos, the text reads "Transfer file from PDFpen (Click name to download)". A table lists several PDF files with their names, dates, and sizes. Below the table, there is a section for "Transfer file to PDFpen" with a "Choose File" button (currently showing "no file selected") and an "Upload Selected File" button.








Name	Date	Size
 A Year of Pages 2.pdf	Jan 12, 2015, 5:17 PM	190 KB
 A Year of Pages-tidbits.pdf	Jan 12, 2015, 4:39 PM	350 KB
 A Year of Pages.pdf	Jan 7, 2015, 3:36 PM	188 KB
 another-test.pdf	Jan 12, 2015, 4:55 PM	613 KB
 IA page 8.pdf	Jan 12, 2015, 5:26 PM	223 KB
 iBookstoreUploadInstructions_2010_29_10.pdf	Jan 6, 2015, 6:17 PM	113 KB
 PDFpen Introduction.pdf	Nov 2, 2012, 4:42 PM	1009 KB
 quicktest.pdf	Jan 7, 2015, 3:19 PM	7 KB
 Sections to check 2.pdf	Apr 18, 2013, 10:27 PM	809 KB
 Take Control of Pages (1.0).pdf	Jan 28, 2015, 4:07 PM	5 MB

Figure 99: Transfer files using a Web browser interface.




Appendix A: The PDFpen AppleScripts

PDFpen and PDFpenPro come with a set of useful AppleScripts that appear on PDFpen's AppleScript  menu when you run PDFpen or PDFpenPro. You can use and modify these scripts for your needs. They perform bulk repetitive actions on one or more PDFs: almost always stuff that you *could* do by hand but which would be tedious and prone to error.

The Scripts

To use PDFpen's scripts, you must first populate PDFpen's AppleScript  menu. This menu appears to the right of PDFpen's Help menu, like so:  . However, because of Apple security restrictions, it doesn't contain any scripts when you first install PDFpen. To add the scripts, choose AppleScript  > Populate Scripts Menu. You only need to use this command once: the Populate Scripts Menu command goes away once you have populated the menu with PDFpen's scripts.

Use the Appropriate Script Menu

Apple provides a different, black Script  menu that can appear among the other systemwide menu icons on the right side of the menu bar; this menu is present in every app if you've enabled it in Script Editor app's General preferences. Neither the PDFpen scripts nor the Populate Scripts Menu command appear on Apple's Script  menu. The Script  menu you want is next to PDFpen's Help menu and only appears in the PDFpen app.

The following are the scripts that come with PDFpen and PDFpenPro, along with some brief notes about what they do and how to use them:


- **Combine PDFs:** This script combines two or more PDFs into a single document. When you run it from the Scripts menu, the documents must be on the same volume because the script displays an Open dialog in which you Command-click to choose the files.
- **Cover Fax Header:** This script covers up the unwanted header of a fax. You can choose the amount of space below the top of the page that needs to be covered; you specify how much space is to be covered in 1/72-inch increments. The fax header is not actually erased, but merely covered with an opaque white rectangle.
- **Export Form Data:** When you receive an interactive PDF form back from someone to whom you sent it, you can use this script to get the data out of the filled form. The script exports the data to a .csv text file, which can be read by Excel or Numbers. If you know your way around AppleScript, you can change the script to export the data in a different format (see [Where to Find the Scripts](#)).
- **Imprint All Pages as First:** This places copies of all the imprints on the first page of a document on every subsequent page. The imprints can be text imprints or graphic imprints; they are placed in the same location as the originals on all the other pages. You might use this to place a logo or a running header on every page.
- **Imprint All Pages with Image:** This script presents an Open dialog so you can select an image file to place on every page. The image is centered on each page (unless you modify the script).
- **Imprint All Pages with Text:** When you run this script, it displays a dialog into which you can enter a short piece of text. The script creates a text imprint that contains the text you entered, and places that imprint, centered, on every page.
- **Merge Every Other:** This script interleaves the pages from two PDFs into a single new PDF. For example, suppose you have two PDFs: one with a text in Latvian, and one with the same text in French. With the Latvian PDF open, run this script and, in the Open


dialog that appears, select the French translation. The result is a PDF with Latvian-French facing-page translations. Or suppose you are scanning a bound book, first scanning the odd-numbered pages into a PDF, and then the even-numbered pages. With this script, you can put those pages into the proper order.

- **Number Pages Using Bates Numbering:** *Bates numbering* is a convention used for legal and business purposes, in which each page of a collection of documents has a unique page identifier. You supply a page number prefix for a document (for example, “Exhibit 15a”), and the script combines that prefix with a five-digit page number, which it places at the bottom left of each page. This script is rarely needed for an individual PDF, given the Bates Numbering option in PDFpen’s Edit > Insert Page Numbers command, but can come in handy should you write workflows to process lots of PDFs.
- **Number Pages:** Run this script to place consecutive page numbers at the bottom left of each page. As with the Bates Numbering script described just above, this script is more useful as part of a workflow; otherwise, use the Edit > Insert Page Numbers command for more flexibility.
- **Remove All Imprints:** This removes any imprints you’ve added. It’s useful if you’ve modified a PDF and saved over the original. Keep in mind, however, that any edited text objects become imprints, and this script removes them as well, along with any moved or resized image objects. Moral: always keep backups.
- **Reverse Pages:** Run this script to reverse the order of the pages in a document. This could be helpful when printing to a printer that doesn’t collate properly, or for a document that is to be bound in right-to-left reading order (such as a Japanese or Hebrew text).
- **Split PDF:** Use this script to break a PDF apart, page by page. This script creates a new folder with the same name as the current PDF document, but with *f* appended to the name, and places the folder in the directory you specify. The script then puts PDF files in that folder, each with a page from the current document. The files have

the same name as the original document, but with a five-digit number appended. The original document is left intact.

Where to Find the Scripts

If you want direct access to PDFpen's scripts—say, you want to copy them or to view them in the Script Editor when PDFpen isn't open—you need to find them. The PDFpen family of applications stores its AppleScripts in a folder in your Home directory's hidden Library folder. The scripts are placed there when you choose the Populate Scripts Menu command from the AppleScript  menu.

Tip: To open your Home directory's Library folder in the Finder, hold down Option and choose Go > Library. To view the contents of a script or change how a script operates, you don't need to open the hidden Library folder: hold down the Option key when you choose a script from PDFpen's Script  menu to see the script in Script Editor.

Where the scripts go in the Library folder depends on which version of PDFpen you purchased:

- PDFpen from the Mac App Store: `~/Library/Application Scripts/com.smileonmymac.PDFpen7.MacAppStore`
- PDFpenPro from the Mac App Store: `~/Library/Application Scripts/com.smileonmymac.PDFpenPro7.MacAppStore`
- PDFpen from Smile: `~/Library/Application Scripts/com.smileonmy-mac.PDFpen`
- PDFpenPro from Smile: `~/Library/Application Scripts/com.smileonmymac.PDFpenPro`

Make Copies before Altering Scripts

It is always a good practice to copy the original versions of scripts before you modify them so you can always get back to where you started. Sure, Time Machine is a dandy tool for helping you revert to previous versions of files, but making a backup of important files (and these are important) leaves you doubly protected.

Learn More

Here's a list of useful Web sites and ebooks for learning more about PDFs and PDFpen:

- [Smile's PDFpen Support and FAQ page](#): You can find answers to common questions, and instructions on how to contact Smile for individual support questions.
- [Smile's Help for PDFpen for iPad & iPhone](#): This PDF, also viewable from within the app, is good to have on-hand. (Tip: save a copy that you can mark up with your own notes and additions.)
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About the Author

Michael E. Cohen lives on the southwest corner of the intersection of technology and the liberal arts. He’s taught writing and literature courses, programmed for the Deep Space Network, designed and implemented instructional word processors, and advised dozens of humanities professors on all matters digital.



As a young man, Michael set out to be a professional dilettante and, after years of struggle, succeeded beyond his wildest dreams.

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