



TAKE CONTROL OF

PDFPEN

COVERS

Version 13 for Mac
Version 6 for iOS/iPadOS

by **MICHAEL E. COHEN**

3rd
EDITION

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Read Me First

Welcome to *Take Control of PDFpen, Third Edition* (version 3.0; covers PDFpen 13), published in May 2021 by alt concepts inc. This book was written by Michael E. Cohen and edited by Joe Kissell.

This book tells you how create, edit, and enhance PDF documents on the Mac with Smile's PDFpen 13 and PDFpenPro 13, and on the go with PDFpen for iPad & iPhone.

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Updates and More

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What's New in This Book

This book covers version 13 of Smile's PDFpen and PDFpenPro and version 6 of PDFpen for iPad & iPhone. The changes in this book from the second edition of *Take Control of PDFpen* cover the new and revised features in those apps. In particular, the user interface of both PDFpen and PDFpenPro on the Mac has been substantially revised to make it easier to use: most of the changes in this book reflect this revision (nearly all the figures, in particular, have been replaced). Here's where you can learn about some of the major changes:

- Need to find where your old, familiar tools have gone? Consult [Where to Find Tools](#) for a guide.
- You no longer need to click a button to switch between markup and selection tools; both are always available. See [The Selection Tools](#) and [The Markup Tools](#).
- Where did the Font Bar go? [The Text Format Tools](#) are now always visible as part of the Editing Bar.
- Descriptions of how [The Object Property Tools](#) work have been substantially revised.
- How you choose and apply colors when you [Highlight Text](#) has changed. Similarly, the interface changes for when you [Add Commentary](#) and [Draw Attention](#) reflect the new user interface.
- The iOS/iPadOS app has been revised; I incorporate the various changes in [Use PDFpen in iOS and iPadOS](#).

Note: My descriptions of the Mac versions of PDFpen and PDFpenPro are based upon version 13, and the iOS and iPadOS section is based upon version 6.0.2. I suggest you update to those versions or later if you haven't already done so. This book should work with any subsequent updates to PDFpen, but I suggest 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 lock picks.

The following pages explain how to use them.

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No matter what you want to do with a PDF, PDFpen or PDFpenPro can probably make it happen if it's possible to do at all. Use this Quick Start to find the help you need quickly.

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- Consult [Make an Interactive PDF Form \(Pro Feature\)](#) to see how you can [Build a Form](#) and [Polish the Layout](#).
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- Not everything you do with PDFpen need be done by hand; consult [Appendix A: The PDFpen AppleScripts](#) for ways to automate a number of PDFpen's capabilities.

Get Your Hands on PDFpen

PDFpen 13 comes in two varieties for the Mac—a standard version and a pro version—and is available from two different sources: the Mac App Store and Smile’s [PDFpen website](#). What’s more, there is also a version of PDFpen for iOS and iPadOS from Apple’s App Store.

If you haven’t yet purchased PDFpen, use this short chapter to learn the differences between each version so you can choose the right one for your needs. And even if you’ve already bought PDFpen, you can use this chapter to learn more about the flavor you chose.

Standard or Pro

Both the standard and pro versions of PDFpen for the Mac are great for a vast number of tasks. You can use either to create PDFs, edit PDFs, combine PDFs, split PDFs, perform OCR on PDFs, manipulate images in PDFs, export PDFs, mark them up many ways, and more.

What sets PDFpenPro apart are the following additional features:

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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).

Until quite recently, 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: Although PDF version 1.7 became an official ISO standard (ISO 32000-1:2008) in January 2008, it included some proprietary Adobe specifications. 2017’s PDF version 2.0 (ISO 32000-2: 2017) standardized those specifications.

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 Mac 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 webpage to PDF in Safari, the images on that webpage are converted into PDF image objects.
- **Text objects:** These objects contain the text, font, and location information (and several 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 devices; 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 cannot edit any line art in a PDF that is a native graphic path object. A graphic path object consists of sets of drawing instructions that your PDF viewer uses to display the object, and these instructions do not lend themselves to casual modification. Graphic path objects differ from the things you can draw in a PDF using PDFpen's drawing tools: the objects you draw in PDFpen are drawing imprints that contain extra information to support editing (similar to how PDFpen handles text imprints).

Nonetheless, with PDFpen's Precision Edit tool you can select, move, scale, and delete native graphic path objects. See [Fine-Tune with the Precision Edit Tool](#) for more about this tool.

- **Add new text imprints and images:** Although editing existing text within a PDF can be tricky, adding an entirely new, editable text imprint is far easier. Same goes for images: you can always plop a new one down on a page. See [Add, Edit, and Remove Text](#) and [Add and Alter Pictures](#) for more.

- **Annotate:** You can add notes, comments, and various graphic objects to mark up a PDF document. You can also add sound annotations and even attach whole document files as annotations. You can mark up the 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 Text Format Tools](#)
- [The Draw Tools](#)
- [The Form Tools \(Pro Feature\)](#)
- [The Object Property Tools](#)

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

Atop each PDFpen document window you'll find a toolbar and an Editing Bar. All the PDFpen tools—the viewing, selection, formatting, drawing, markup, and form tools—are available on these two bars (**Figure 1**).



Figure 1: The toolbar and Editing Bar on top of each PDFpen document window provide the viewing, markup, and editing tools you use. (Don't worry if you can't make out the details; you'll see them in subsequent figures.)

The toolbar has tools for adjusting your view of the document, adding items like highlights and text notes, and accessing useful windows like [The Inspector](#) and Find windows.

Tip: As with many Mac apps, you can specify which items appear on the toolbar and where they appear: Choose View > Customize Toolbar. (Naturally, this book describes the toolbar's default layout.)

Beneath the toolbar is the Editing bar, with the tools you use to select and manipulate a PDF's contents and to adjust the appearance of what you have selected. You can show or hide the Editing bar with View > Hide/Show Editing Bar (⌘-Shift-E).

Tip: Hover your pointer over any item on the toolbar and Editing Bar to see a tip about what the tool is for.

The tools on these two bars are also available on PDFpen's Tools and Format menus.

Notice the Keyboard Shortcuts

Even if you prefer to use the toolbar and Editing Bar, note the ⌘-key equivalents of some of the items on the Tools and Format menus and submenus; these can come in handy.

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




The Selection Tools


You can find PDFpen's selection tools at the left end of the Editing Bar (below the toolbar)—for brevity's sake, I'm calling them “selection tools,” even though, as you'll see, not all of them select objects within a PDF (**Figure 2**).




Figure 2: The selection tools appear at the left end of the Editing Bar.





Here's what each tool in this group 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 explicitly choose to correct the selected text 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 with this tool. Generally, text objects and graphic path objects created by another program cannot

be selected and moved by it: you can select only those text and graphic imprints that you have added with PDFpen's own text and drawing tools (see, however, the next tool in this list). Note that with the Edit tool, you *can* select, move, resize, and delete most PDF image objects within a PDF, whether or not you added them with PDFpen's tools.

- **Precision Edit** : This is the tool you use when you need to select, move, scale, and delete native PDF text objects and graphic path objects. See [Fine-Tune with the Precision Edit Tool](#) for more about using this tool.
- **Select Rectangle** : Use this tool to select a rectangular area on the currently displayed page. You can then copy the selected area and paste it on a page (as a graphic object), or you can crop the current page to the selected area.
- **Measurement** : This tool, while grouped with the selection tools, doesn't select anything. Instead, you use this tool when you need to measure something within a PDF. See [The Measurement Tool](#) sidebar for details.
- **Hand** : Again, this isn't a selection tool, though it's grouped with them. You use it to reposition the visible portion of the PDF within the window and to zoom in or out. See [Adjust the View by Hand](#).

The Measurement Tool

When you drag it on a PDF, the Measurement  tool, found just to the right of the selection tools on the Editing Bar, draws a measurement ruler to show the distance between objects on a page. Its sole purpose is to provide you with quick measurements.

The units that the ruler displays depend on the document; by default, the ruler uses the measurement units set in PDFpen > Preferences > Editing, but if any region in a document contains scale information, such as in an architectural document, the ruler shows the units specified by that scale (**Figure 3**).

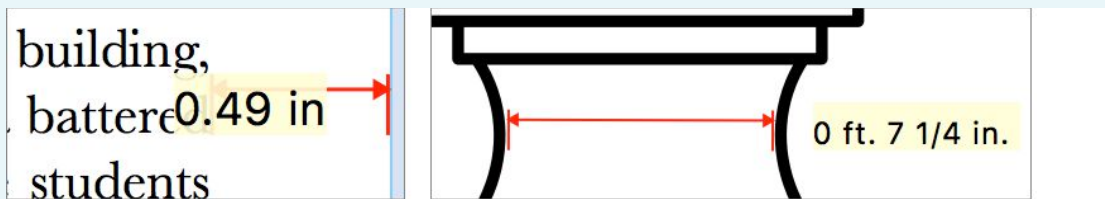


Figure 3: The Measurement tool displays the units specified in PDFpen’s Preferences by default (left), but it can also use the units within scaled regions, such as in architectural documents (right).

The ruler is temporary, vanishing when you move on to some other activity, and you can have only one ruler displayed at a time.

The Markup Tools

Among the most common things people do with PDFs (other than read them or print them, of course) is to mark them up with notes, comments, drawings, and additional text blocks. To that end, PDFpen provides a variety of tools on the toolbar (**Figure 4**).

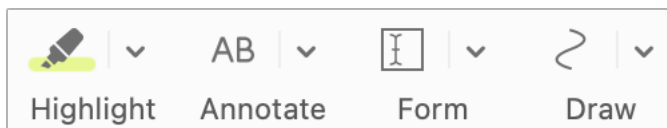





Figure 4: The markup tools live on the PDFpen window’s toolbar. This figure includes the Form tools, available in PDFpenPro.

Single-Use Tools


The Markup tools, with the exception of the Highlight tool, are single-use by default. That is, if you select one and use it, PDFpen then reverts to the Edit  tool. For example, if you choose the Text  annotation tool (see below) and click somewhere on a page, a new text box is created where you clicked and the tool is deselected on the toolbar so the next click uses the Edit  tool.

You can change this default behavior via PDFpen > Preferences > Editing by checking “Keep tools selected after use.” This keeps the tool selected for repeated use when you click it. If you only occasionally want to lock a tool, leave the Editing preference unchecked and double-click the tool to lock it.

Each of the toolbar markup tool buttons provides a pop-up menu from which you can select related but alternative tools. We’ll take a look at how to mark up a PDF later, in [Take Notes on a PDF](#) and in [Copyedit and Review a PDF](#), but, for now, I describe the tools you use for marking up a PDF that you can choose from each toolbar button’s pop-up menu. These tools consist of [The Highlight Tool](#), [The Annotate Tools](#), [The Form Tools \(Pro Feature\)](#), and [The Draw Tools](#).

Note: The icons on the markup tool buttons change to show the currently selected tool. When referring to the various toolbar markup tool buttons in this book, I use the default icon for the button, which is the top icon on each button’s pop-up menu.

The Highlight Tool

The toolbar’s Highlight  tool (⌘-3) gives you the capability of selecting text and highlighting it, using the current highlight color, which is available on the tool’s pop-up menu (**Figure 5**).

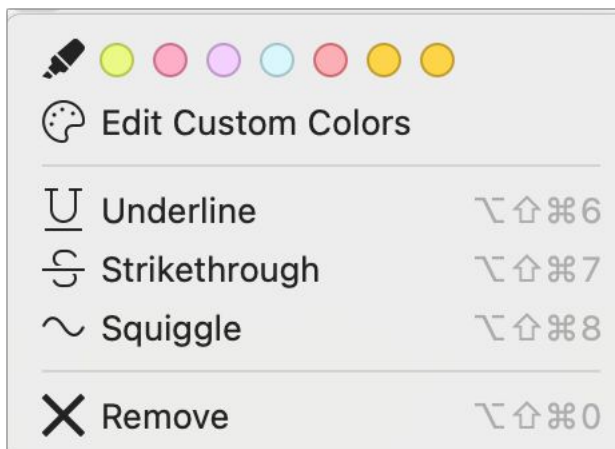




Figure 5: The Highlight tool's pop-up menu offers colors and alternative marks.

In addition to the offered highlight colors, you can use the pop-up menu's Edit Custom Colors command to specify custom highlight colors (the rightmost three colors in the menu). The pop-up menu also offers the capability of marking text with one of several alternative highlight marks and a tool to remove existing highlights. See [Take Notes on a PDF](#) for more on using this tool.

Tip: When the Highlight  tool's highlighter marker item is chosen, you can drag over non-text portions of a PDF's page to draw free-form highlight marks with the Highlight  pointer.

The Annotate Tools

Use the tools available on the Annotate **AB** button's pop-up menu to add different types of annotations to a PDF (**Figure 6**).

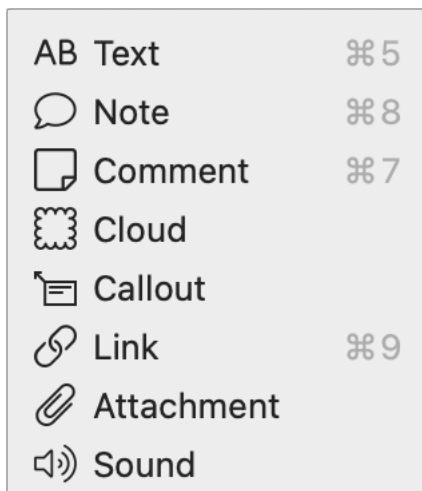






Figure 6: You can add different types of annotations to a PDF with items on the Annotation tools pop-up menu.



Most of the annotations you can add consist of text that is framed or positioned in a specific manner; see [Take Notes on a PDF](#) for more details. Here's a list of the types of annotations you can add:

- **Text AB (⌘-5):** This tool creates a text box wherever you click on the page. PDFpen refers to these boxes as *imprints*. You can resize the box, adjust the appearance of both the text in the box and the background color of the box, and move the box where you like. Text imprints are always visible in the PDF, no matter what program you view them in, and they are always editable in PDFpen.
- **Note (⌘-8):** This tool adds a note icon to the page along with an associated note window in which you can add text. You can position both the note icon and its window where you want. If you close the note window, you can click the note icon to reopen 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 (⌘-7):** 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 they 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.


- **Cloud** : An alternative to the Comment  annotation tool's text box, this tool surrounds the comment box with a cloud shape, making it more visually identifiable as a comment.
- **Callout** : Drag from a point of interest in a PDF to create a callout text box. See [Draw Callouts](#).
- **Link**  (**⌘-9**): You use this tool to create transparent rectangular link objects that, when clicked, go to a web location, to another page within the PDF, or to a PDF stored elsewhere (see [Create Links](#)). You can position and resize these objects. By default, link objects 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 indicator, such as colored text (like on webpages) or a button-like icon.

- **Attachment**  (**Pro only**): Attach any file as an annotation with this tool. For example, if the PDF you receive from a colleague contains a spreadsheet table, you could attach a revised spreadsheet document that the colleague might want to use instead. I recommend that you also add a text comment beside the attachment explaining what the file contains and including the file's name.
- **Sound** : Record a sound annotation, or attach a pre-recorded audio file, with this tool. Those who read the PDF can click the annotation to hear the recording.

Note: PDF apps that don't support file or audio attachments (including Apple's own Preview app) strip out these attachments if you save the PDF with those apps.

The Form Tools (Pro Feature)

You use the Form  creation tools (**Figure 7**), which appear among PDFpenPro's markup tools on the toolbar, to add interactive form elements to a PDF. [Make an Interactive PDF Form \(Pro Feature\)](#) describes how to set the elements' names, values, behaviors, and other characteristics (and you might also want to check out [Fill Out PDF Forms](#)).

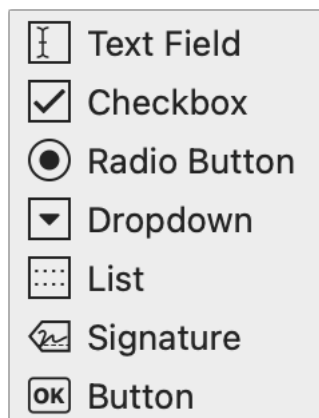





Figure 7: Use PDFpenPro's Form  creation tools, available on the Form  button's pop-up menu on the toolbar, to make an interactive PDF form.







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 that PDFpenPro provides:

- **Text Field** : Use this to create a field into which the user can enter text. The default field has a 1-point border; you can set border width, style, and stroke color with [The Object Property Tools](#).

- **Checkbox** : 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 on the Form Element Properties tab of [The Inspector](#).
- **Dropdown** : Use this to create a dropdown menu form element with multiple menu choices. This element can look significantly different in apps other than PDFpen and on platforms other than the Mac.
- **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** : Insert an interactive signature field with this tool. Users tap the field on a trackpad or touchscreen and then write their signatures by fingertip; they can optionally accompany the signature graphic with digital signature certificates (see [Sign Forms Digitally](#)). The image of the signature is included with the form when it is submitted.
- **Button** : Use this to create a Submit button, which, when clicked, submits form data either via email or to a web app.

The Draw Tools

As I pointed out earlier in [Line Art Is Special](#), modifying standard PDF graphic path objects is limited using PDFpen's capabilities. However, you can use PDFpen's Draw  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, available on the toolbar's Draw  tools pop-up menu (**Figure 8**), are similar to those in many other programs, and probably look familiar to you. You can also choose any drawing tool from the Tools menu.



Figure 8: The PDFpen Draw  tools pop-up menu.

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

- **Scribble**  (**⌘-6**): As you drag with this freehand drawing tool, it draws a line that follows the dragged path. You can select, resize, and move these scribbles with the Edit  tool (see [The Selection Tools](#)).
- **Polygon**  : Use this to create simple or complex objects made of connected line segments. Each click adds a line segment to the polygon (**Figure 9**); click the endpoint of a line segment to close the polygon.

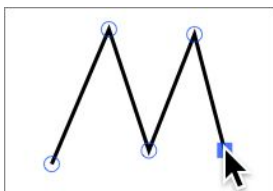






Figure 9: A polygon being drawn, segment by segment.

- **Rectangle** , **Oval** , and **Rounded-Edged Rectangle** : Click or 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 Text Format Tools

Whether you're adding text to a PDF with one of [The Markup Tools](#) or have chosen to [Use the Correct Text Command](#) to change the text already in a PDF, you may also want to have some control over how that text looks. That's a golden opportunity to use PDFpen's text format tools that appear on the Editing Bar to the right of the selection tools (**Figure 10**). (If the Editing Bar isn't visible, choose View > Show Editing Bar.)



Figure 10: The text format tools on the Editing Bar provide quick access to common text formatting commands.

When you select editable text, you can use the text format tools to change the selection's typeface, type size, type style, type color, and type alignment quickly.

Note: You are, of course, not limited to the text formatting capabilities of the Editing Bar tools; PDFpen provides additional commands you can use to [Change the Appearance of Text](#).


The text format tools also come in handy even when you select non-editable text in a PDF. Ever seen a typeface in a PDF and wonder what it was? Select the text with the Select Text  tool, and the text format tools tell you (**Figure 11**).



Figure 11: The text format tools reveal the typeface used in a text selection, editable or not, such as this text in the Georgia typeface.



The Object Property Tools

The object property tools are the rightmost items on the Editing Bar (**Figure 12**).



Figure 12: The object property tools are four pop-up menus from which you can control the visual appearance of objects in a PDF.

From left to right, the object property tools affect the following aspects of an object's appearance:

- **Stroke Color**  : Use this pop-up menu to choose the stroke color of a selected object (that is, the color of the lines that make up or enclose an object). The current stroke color is displayed below the pop-up menu's icon.
- **Fill Color**  : This pop-up offers colors with which you can fill the interior region of a graphic object; the current fill color for a selected object, if any, appears under the tool's icon.
- **Stroke style:** 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 elliptical shapes, 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 will often 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 (⌘-Option-I) or click the Inspector ⓘ icon on 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—or pressing a keyboard shortcut, as shown on the menu.

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

- **Alignment** ⌵ (⌘-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; ⌘-Option-2): You can set the name, value, appearance, and behavior of a selected form element here. The active controls that appear on the tab vary depending on the form elements chosen.
- **Document Information** 📄 (⌘-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; ⌘-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 on 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 "macOS Version 11.2.3 (Build 20D91) 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 (⌘-Y), or click Library  on the toolbar.

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, text imprints, and, in PDFpenPro, text fields from

forms. Unlike the typically chaotic junk drawer, however, the Library has separate collections for each type of object it contains (**Figure 13**).

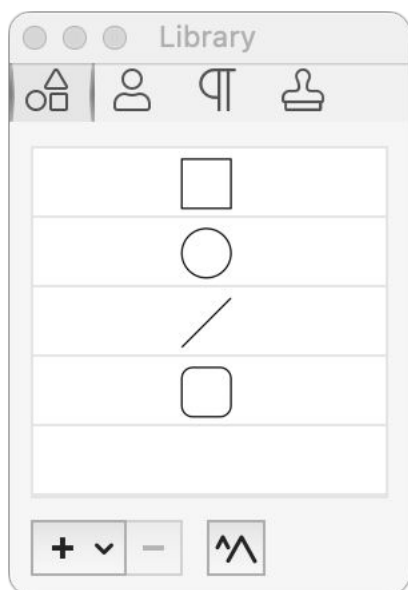







Figure 13: The Library window has separate collections for each kind of item: Built-ins, Custom, Proofreading Marks, and Stamps.


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, images, and text fields created with [The Form Tools \(Pro Feature\)](#). 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 predefined stamps with the pop-up menu that appears below the collection, and you can add your own stamps:



- ▶ *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.
- ▶ *User Defined*: These are stamps you have created. To add a User Defined stamp, choose Add Custom Stamp (⌘-Option-Shift-9) from the Add  pop-up menu and then, in the dialog that appears, define the stamp’s contents and appearance.

Note: You can set the name used in Dynamic stamps by editing the Name field in PDFpen > Preferences > Editing.

To see the Library window and its contents at a larger size, click the Library Size  button; to reduce the window’s size, click it again.


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 one or more items on a page in the PDF.
2. From the Add  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.

Note: If you have more than one item selected when you choose Add Selected Imprint, PDFpen adds all the selected items to the Library as a single unit.

Tip: The Library's Add  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 item you have added to the Custom collection: select it in the Library and click the Remove  button.

Note: If you are signed in to iCloud and have given PDFpen access to iCloud Drive, your Library contents sync to your other Macs and iOS/iPadOS devices that are also signed in and have the same access.

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 chapter shows you how to get around quickly so you can get on with your work.

Display Pages

For decades, the World Wide Web has made us comfortable with the idea of single pages that contain endlessly flowing text. On the web we expect everything to exist on a single page, and we 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 14**. 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.

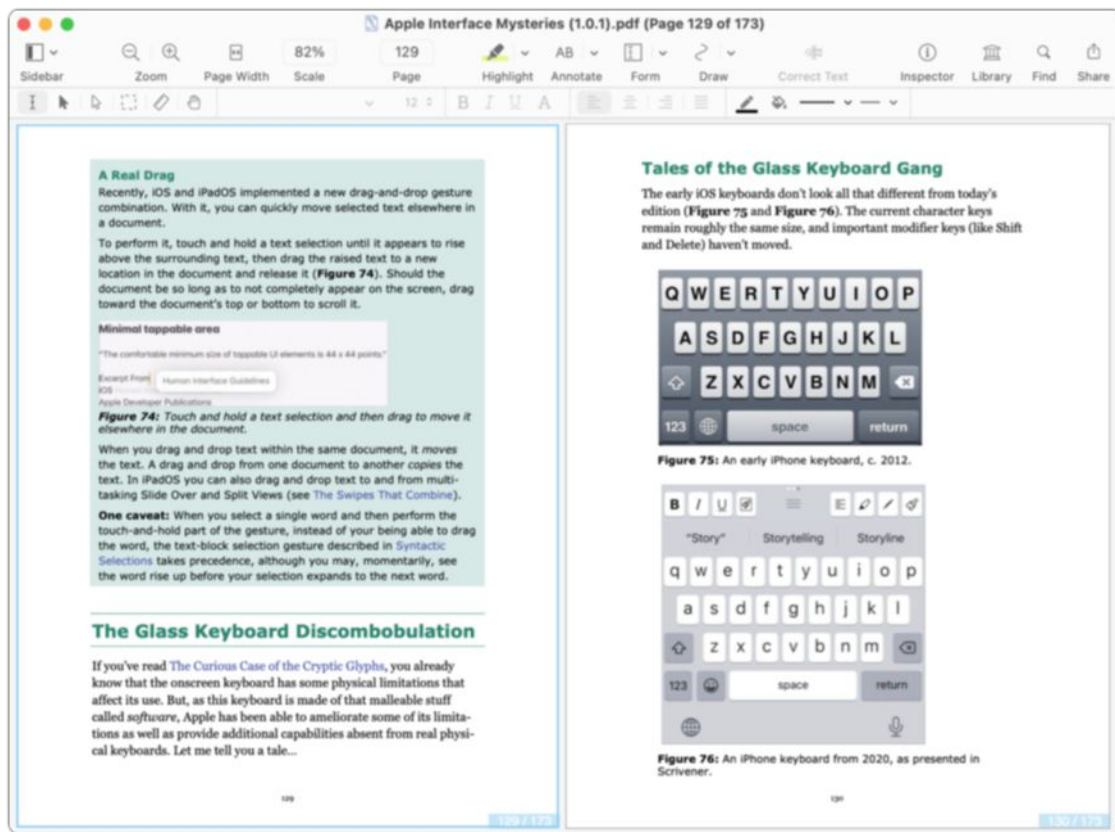



Figure 14: A PDF is displayed in a facing pages view.

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

- Choose View > Facing Pages.
- On the toolbar, click the Sidebar  button's pop-up menu and then choose Facing Pages.

Facing Pages Preference and Start with Cover

A setting in PDFpen > Preferences > General is associated with facing pages: "Default view," which you can either set to Single Page or to Facing Pages.

Whether you set Facing Pages or not as a default, when you enable Facing Pages you might also want to choose the View > Start with Cover command, which when chosen shows the PDF's first page on its own as in a printed book.

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 (⌘-o [Zero]):** PDFpen obtains the pixel density of the Mac's display from macOS and uses that information to scale the document to its full size on screen.
- **Zoom In (⌘-+):** 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 (⌘--):** This reduces the magnification by a percentage relative to the current magnification, much like the way that Zoom In works.
- **Zoom to Fit (⌘-Option-o [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.
- **Zoom to Width (⌘-Option-9):** To view the complete width of the current page regardless of the viewing area's height, choose this command.

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

A Matter of Scale

PDFpen > Preferences > General, you can choose what 100% scale (actual size) means (**Figure 15**).

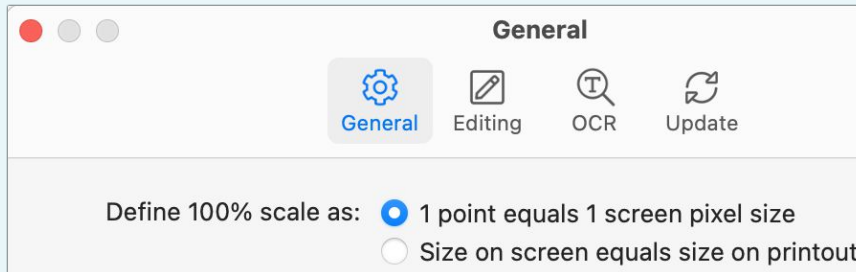


Figure 15: You can choose how PDFpen interprets “100% scale.”

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.

Use the Magnifier Window


As you have just seen in the previous topic, you can zoom in or out of your view of a PDF. There are times, though, when you may not want to zoom in on the entire document but just want to see a magnified portion of it. For example, you may have a map of a wilderness hike and want to see both the full map but also take a close look at a trail junction on it, or perhaps you have a PDF containing a study of Etruscan pottery and you want to be able to read the text while getting a close look at the figure showing an important shard, or maybe you want to examine the exquisite line art printed on a PDF scanned from an old government document (**Figure 16**). Those are the sorts of tasks the floating Magnifier window is designed to help you accomplish.



Figure 16: Use the Magnifier window to examine fine details within a PDF, such as the exquisite line art found in a mid-20th century government report.

To bring up the Magnifier window, choose Window > Magnifier (⌘-Option-M); choose the command again to dismiss the window.

To see a magnified portion of a PDF, point at the document: the window magnifies whatever part of the PDF your pointer is over.

Note: You can use any Editing bar tools when the Magnifier is open; whether your pointer is an arrow  pointer or some drawing tool makes no difference.

You can adjust how much the window magnifies using the slider at the bottom of the window or by clicking the plus + or minus – buttons at the ends of the slider.

Split the View

Have you ever read a book with endnotes? Did flipping back and forth between the main text and the notes irritate you? If the book were in PDF form, and you were reading it in PDFpen, that irritation would

evaporate with the morning dew, courtesy of the Split command. This command offers the capability of displaying two parts of the same document at once (**Figure 17**).

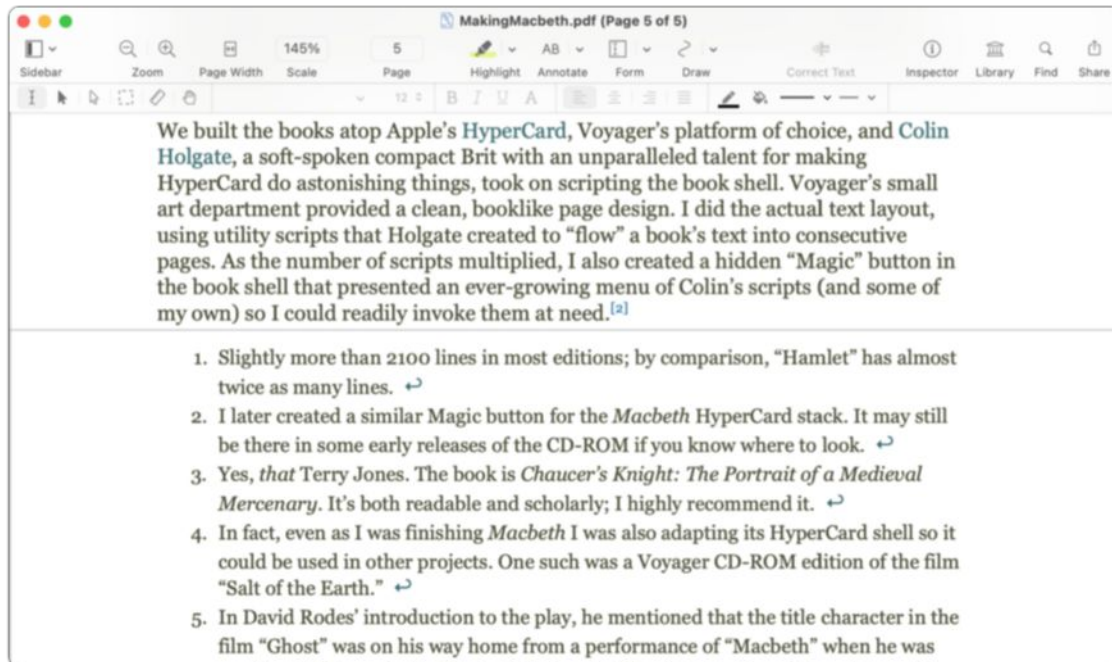






Figure 17: Both the main text of this essay about the creation of the first ebooks and the endnotes for the essay appear at the same time in PDFpen's Split view.

To split a PDFpen window, choose Window > Split > Horizontally (as in **Figure 17** just above) or Window > Split > Vertically (for a side-by-side layout).

To remove the split view, choose Window > Split > Remove Split.

When you split a PDFpen window, you can scroll each view separately: click within the view you want to scroll to focus PDFpen's attention on it, and then scroll as you ordinarily would. The toolbar's Page indicator shows the number of the selected view's page.

Tip: Customize the toolbar (View > Customize Toolbar) to add Page Up  and Page Down  buttons to it so you can then use them to move from page to page within the selected view (see [Navigate Pages](#) for more about moving between pages).


Similarly, you can zoom into or out of each view independently using the toolbar's Zoom In  and Zoom Out  buttons or with the menu commands described in [Magnifying Pages](#) just previously: click the view you want to zoom and then use any of the zooming methods. The toolbar's Scale indicator reflects the magnification of the currently selected view.

Not All Split Views are Equal


When you use a split view, PDFpen treats the left view (for vertical splits) or top view (for horizontal splits) as the main view. The other view is designed to allow you to compare its contents with the main view and is read-only. Thus, you may [Edit a PDF's contents](#) or [Take Notes on a PDF](#) only in the main view.




Similarly, when you [Navigate with the Sidebar](#) while using a split view, PDFpen uses the active view for navigation purposes by default regardless of which view you have selected. You can, however, navigate the other view with the sidebar by Option-clicking sidebar entries.


Adjust the View by Hand

For those times when you are zoomed in to the PDF very closely, or, for that matter, zoomed really far out, you could make use of the scroll bars to move your view (depending on your Show Scroll Bars setting in System Preferences > General and the type of pointing device you have), but an alternate, and often easier, way to pan around your PDF is with the Editing Bar's Hand  tool.

To pan around the page, simply drag with the tool.

When the Hand  tool is selected, you can use it to zoom the view in and out:

- **Zoom in:** Option-click the page to zoom the view in the same manner as View > Zoom In (.
- **Zoom out:** -Option-click the page to adjust the view in the same way as View > Zoom Out (.

- **Zoom in an arbitrary amount:** Option-drag the Hand  tool in any direction. The shorter the drag, the greater the magnification, up to PDFpen's maximum of 1600%.

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 18** shows a continuous page display.

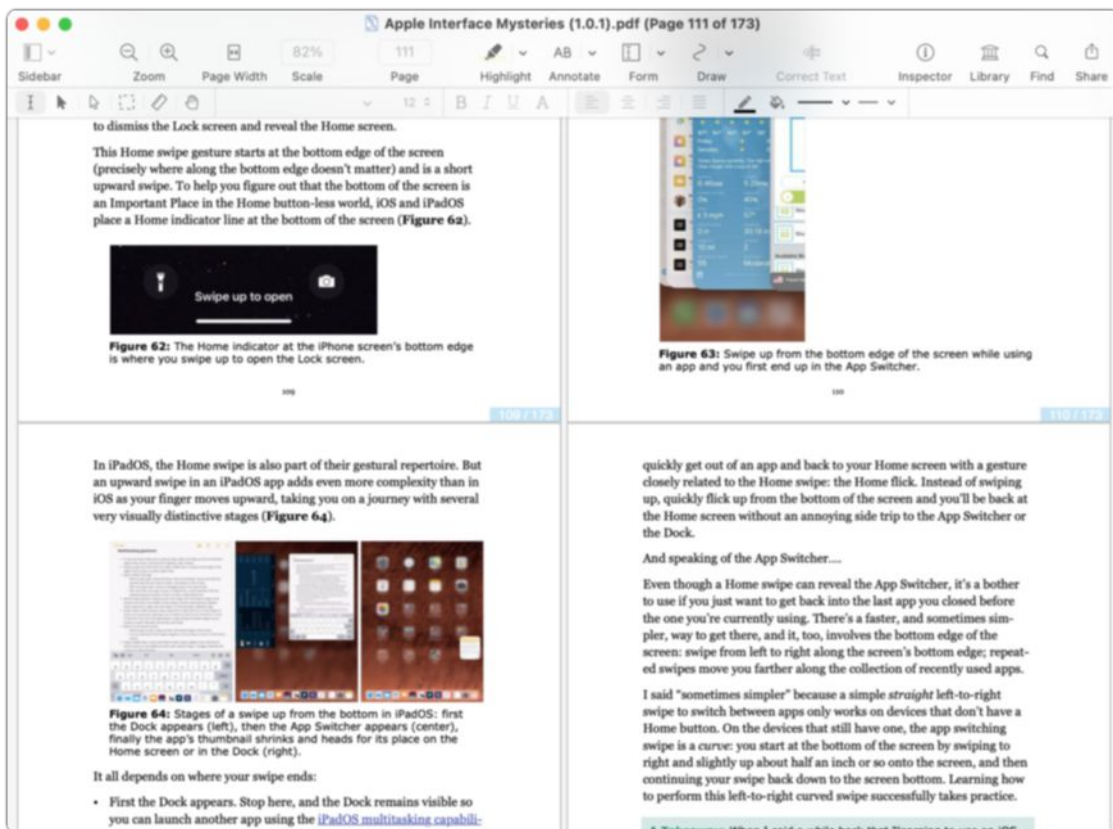



Figure 18: Continuous page display gives you an overview of where you are in the document.





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 toolbar.

Note: When you have a split view (see [Split the View](#)), the View commands for Continuous, Single Page, and Facing Pages apply to the currently selected split view.

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:

- **Page Up**  / **Page Down**  **buttons:** Though not available by default, you can customize the toolbar (View > Customize Toolbar) to add these buttons; use them 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 field:** To go to a specific page, select the page number displayed in the toolbar's Page field 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's Page Up  and Page Down  buttons, described just above.
 - ▶ *First Page and Last Page:* These go, respectively, to the first page and last page in the document.

- ▶ *Go to Page (⌘-Option-G)*: Similar to the toolbar's Page field, this command presents a dialog where you enter the page number to which you want to go.
- ▶ *Back and Forward*: You can choose Go > Back (⌘-[) to retrace your most recent navigation moves, and Go > Forward (⌘-]) 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 [Create Links](#)).
- **Gestures or scrollbar**: If continuous page display is turned on, 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.

Note: If continuous page display is turned off 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. You can also use Shift-Space and Space as alternates on any keyboard (as long as you are not editing text, of course). Use the Home or End key to go to the first or last page.

Tip: Although PDFpen shows the current page number in the window's title bar, you can choose View > Page Numbers to display a non-printing page number at the bottom right of each page. This can help when you have multiple pages visible in the window (as in **Figure 18**, 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 19**.

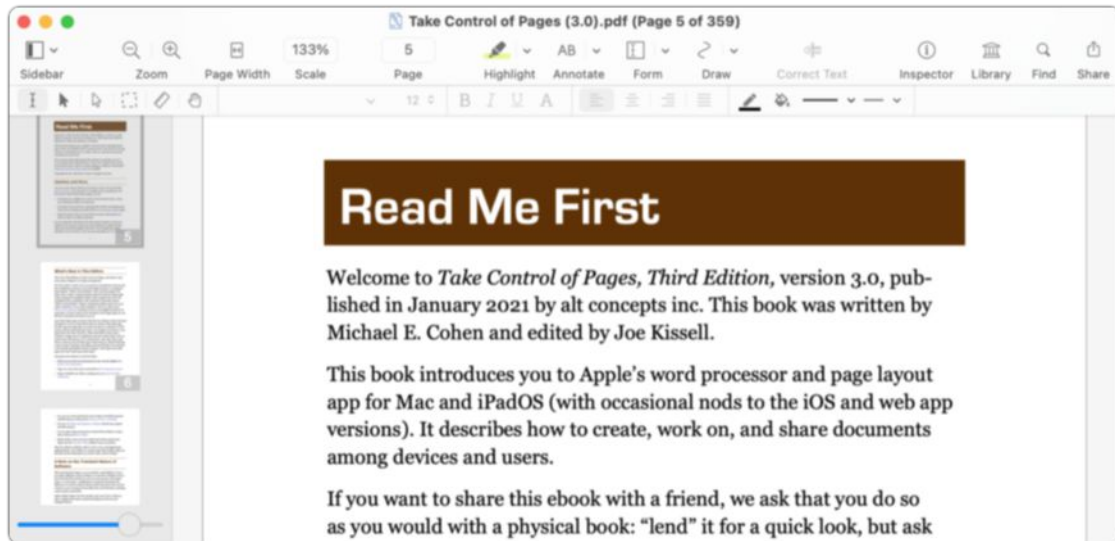






Figure 19: The sidebar, on the left side of the window, can show page thumbnails, annotations, attachments, search results, or the table of contents; in PDFpenPro it can also show form fields. At the bottom of the Thumbnails sidebar shown here is the thumbnail magnification slider.

You can make the sidebar visible by choosing View > Show Sidebar (⌘-Shift-D), or you can use the Sidebar  pop-up menu on the 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 so that it becomes a resize  pointer, and then drag left or right.

Tip: Click the Sidebar  icon in the toolbar to toggle the sidebar's visibility.

The sidebar display options available on the toolbar's Sidebar  pop-up menu include page thumbnails, annotations, attachments, and the document's table of contents (if it has one); in PDFpenPro it can also show form fields (see [Set the Tab Order](#)). Note that these commands also appear on the menu bar's View menu.

Tip: Option-click a page thumbnail, annotation, attachment, form field (in PDFpenPro) or table of contents entry to view that item in Split View (see [Split the View](#)).

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 the tools you use to add notes, comments, text imprints, and other sorts of annotations to a document in [The Markup Tools](#). Once you have annotated a PDF, PDFpen makes it easy for you to find your annotations in the Annotations sidebar. It can list every note, comment, text imprint, link, sound note, attachment, scribble, and highlight you've added to the document (**Figure 20**).

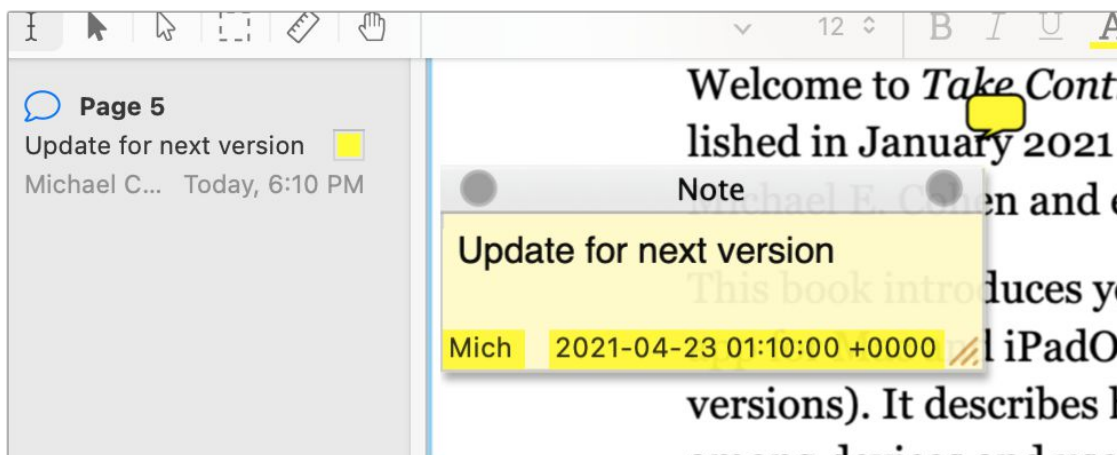


Figure 20: The Annotations sidebar with a note displayed.

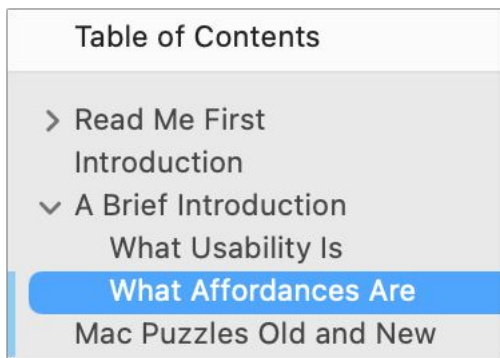
Click any entry in the Annotations sidebar to navigate to the page that contains the corresponding item. When you do, PDFpen also selects the item so you can immediately work on it. For example, if you click a note entry, PDFpen displays the page that contains the note icon, and also opens the associated note window.

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

Tip: Need to copy the contents of an annotation or delete one easily? Use the Annotations sidebar to [Select, Copy, and Delete Annotations](#).

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. You can see part of the Table of Contents sidebar in **Figure 21**. The table of contents shown in the figure has several main entries that contain sub-entries; these appear indented below their main entry.



| Table of Contents | |
|-------------------|-------------------------|
| > | Read Me First |
| | Introduction |
| ▼ | A Brief Introduction |
| | What Usability Is |
| | What Affordances Are |
| | Mac Puzzles Old and New |

Figure 21: A table of contents in the sidebar can display sub-entries.

Note: The pale blue bar that appears on the left of the sidebar indicates the content items currently visible in the document window.

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

If, as in **Figure 21**, a table of contents entry has sub-entries, you can hide or reveal them in the list by clicking the disclosure ► icon beside the main entry.

Tip: You can select one or more table of contents entries and use Edit > Copy as Text to copy those entries for subsequent pasting into a text editor, word processor, or email message.

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 \(Pro Feature\)](#).

Bookmarking Pages

Even when a PDF contains no Table of Contents, it still provides access to the Table of Contents sidebar. Why? So you can navigate to bookmarks. You can bookmark any page in a PDF with PDFpen's Edit > Bookmark > Add Bookmark command. When you bookmark a page, it's listed under Bookmarks in the Table of Contents sidebar (**Figure 22**).

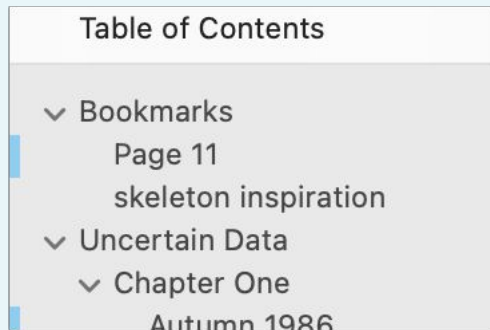



Figure 22: Bookmarks appear at the top of the Table of Contents sidebar.


To navigate to a bookmarked page, click its entry in the Table of Contents sidebar's Bookmarks list.

When you create a bookmark, it's named after the page number of marked page. If you have PDFpenPro, you can rename a bookmark to make its name more informative: click the bookmark entry to select it and then click a second time to make the name editable.

Should you become a bookmarks fan, you can place an Add Bookmark  button on the toolbar by choosing View > Customize Toolbar.

To remove a bookmark, click its sidebar entry to select it and then choose Edit > Bookmarks > Remove Entry.

Navigate with Search Results

In PDFpen, you perform text searches with the Find window. Click the Find  button on the toolbar or choose Edit > Find > Find (⌘-F) to display the Find window (**Figure 23**).

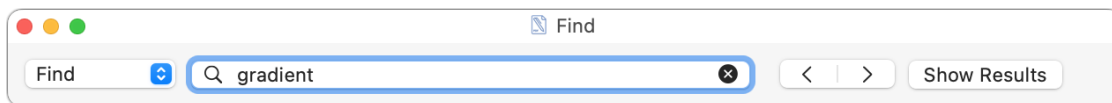


Figure 23: PDFpen has a separate Find window.

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 24**).

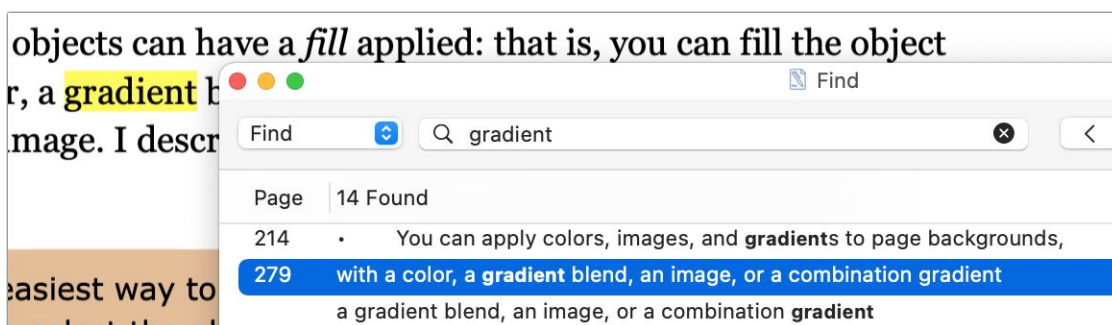



Figure 24: Click a search result to see the search term selected on the document page.

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 (⌘-G):** Choose this to jump forward to the next search result.
- **Find Previous (⌘-Shift-G):** Jump back to the preceding search result.
- **Jump to Selection (⌘-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. For example, 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.

Another Tip: Another Find command, Find and Highlight (⌘-Shift-Option-F), comes in handy for annotating text; see [Find and Highlight in Take Notes on a PDF](#).

Yet another tip: Ordinarily, when you have [Split the View](#) and you click a search result, PDFpen navigates to it in the main pane (see [Not All Split Views are Equal](#)). Option-click a search result to see it in the other split view pane.

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 (⌘-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.

Navigate Portfolios

Portfolios are special types of PDF documents that contain more than one document—and they don't all have to be PDFs, either. Portfolios come in handy when you have a group of PDFs and related files that all belong to one project and you want to keep them all together. You must have PDFpenPro to create portfolios (see [Create Portfolios \(Pro Feature\)](#)), but you don't need it to open and use them: PDFpen works fine for that.

Note: Not all PDF readers can open PDF portfolios. For example, Apple's own Preview can't.

You open a PDF portfolio like any other PDF: choose File > Open (⌘-O) in PDFpen, or double-click the portfolio in the Finder, or drop the portfolio icon on PDFpen in the Dock. No matter how you open it, PDFpen displays the portfolio window (**Figure 25**).

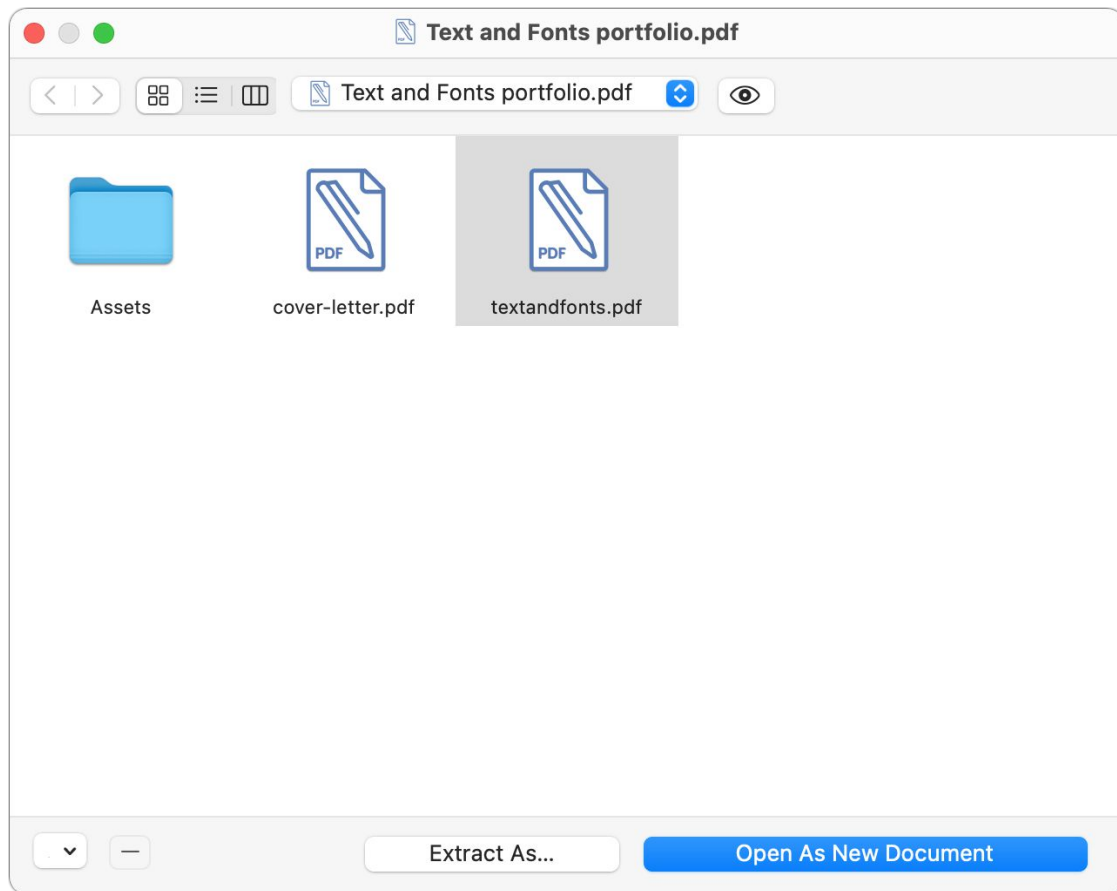





Figure 25: A PDF portfolio opens in a Finder-like window.

To preview one of the documents in a portfolio, click to select it and then click the portfolio window's preview  button. This opens a preview window similar to those displayed by the Finder.


Tip: You can select a document and then press the Space bar to view its preview just as you can in a Finder window.

Also just as in a Finder window, you can use the multi-segment file view  button to display the portfolio's contents as icons, in a list, or in a column hierarchy.

Portfolios can contain folders: double-click a folder to display its contents in the portfolio window. You can use the forward and back

 buttons to retrace your steps like you can in a Finder window, or use the hierarchy pop-up menu at the top of the window to move up the portfolio's folder hierarchy.

Of course, portfolios would be almost useless if you couldn't do anything with their contents. You can do three things with the items in a portfolio:

- **Extract:** Select a document and click Extract As, and then use the file saving dialog that appears to save a copy of the extracted document on your Mac, optionally renaming the copy.
- **Open as a new document:** For PDF documents in the portfolio, you can select the document and click Open as a New Document to edit an untitled copy of the document in PDFpen, which you can then save as you would any other PDF.
- **Delete:** Select one or more items in the portfolio and click the delete  button at the window's bottom.

Tip: You can double-click a PDF in a portfolio to immediately edit it as a new document in PDFpen.

Finally, even though you need PDFpenPro to *make* a portfolio, you can add items to an existing portfolio with PDFpen. See [Create Portfolios \(Pro Feature\)](#) to see how to add items to an existing portfolio.

Create a PDF

Chances are good that you have a bunch of PDFs scattered around your Mac's 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](#).
- If you need to serve up multi-course banquets, you can gather multiple PDFs and the documents you used to create them and [Create Portfolios \(Pro Feature\)](#).
- 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 and build it out yourself.

Create a Blank PDF

Here are the steps for making a pageless PDF and then adding a blank page with the dimensions you desire:

1. Choose File > New > Blank Document.

PDFpen creates a completely empty PDF.

2. Choose File > Page Setup (⌘-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 (⌘-Option-B).
4. In the dialog that appears (**Figure 26**), click to select a page background design and orientation, and then click Choose.



Figure 26: You have lots of colorful stationery choices from which to choose.

The new blank page matches your Page Setup settings.

Tip: If PDFpen's default Page Setup settings are fine for you, you can quickly create a new document using stationery: choose File > New > From Stationery (⌘-N), click in the dialog to select the page background and orientation, and then click Choose.

With blank page in hand (virtually), you can now populate your PDF with text imprints, drawings, and images. [The Markup Tools](#) and [The Draw 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.

Alternative Ways to Create Pages

Here are two ways to create blank pages in an existing document:

- ✦ You can select a thumbnail in the Sidebar (see [Navigate with the Sidebar](#)) and then choose Edit > Insert Blank Page (⌘-Option-B) to create a blank page with the same dimensions and orientation as the selected thumbnail's page.
- ✦ Use the Edit > Insert Blank Page Again (⌘-Option-Shift-B) command to insert either the previously selected stationery or a blank white page.

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

Create a PDF from Another PDF

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 Thumbnails sidebar (if you need help, read [Navigate with Thumbnails](#)), and then choose File > New > From Selection (⌘-Shift-N).


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

Note: You can, instead, choose File > New Blank Document to create a document with no pages and then drag pages from other PDFs into the blank document as you like.

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

One More Thing...

There's a variation on the 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 (⌘-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 27**).

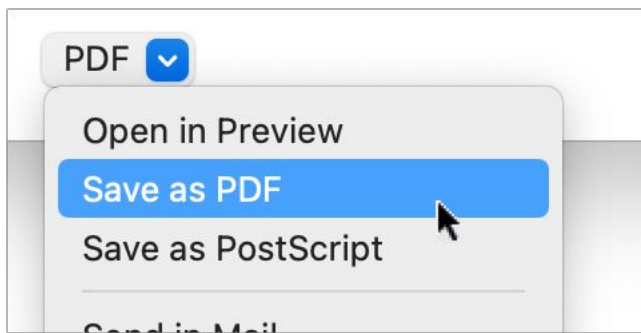


Figure 27: You can create a PDF document with the Print dialog's PDF pop-up menu.

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 (read about the Document Information tab in [The Inspector](#) to learn about these metadata items).

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 your Mac's Image Capture software recognizes. (To learn about working with documents you've already scanned, see [Use OCR on Scans and Graphic Files.](#))

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 28**).

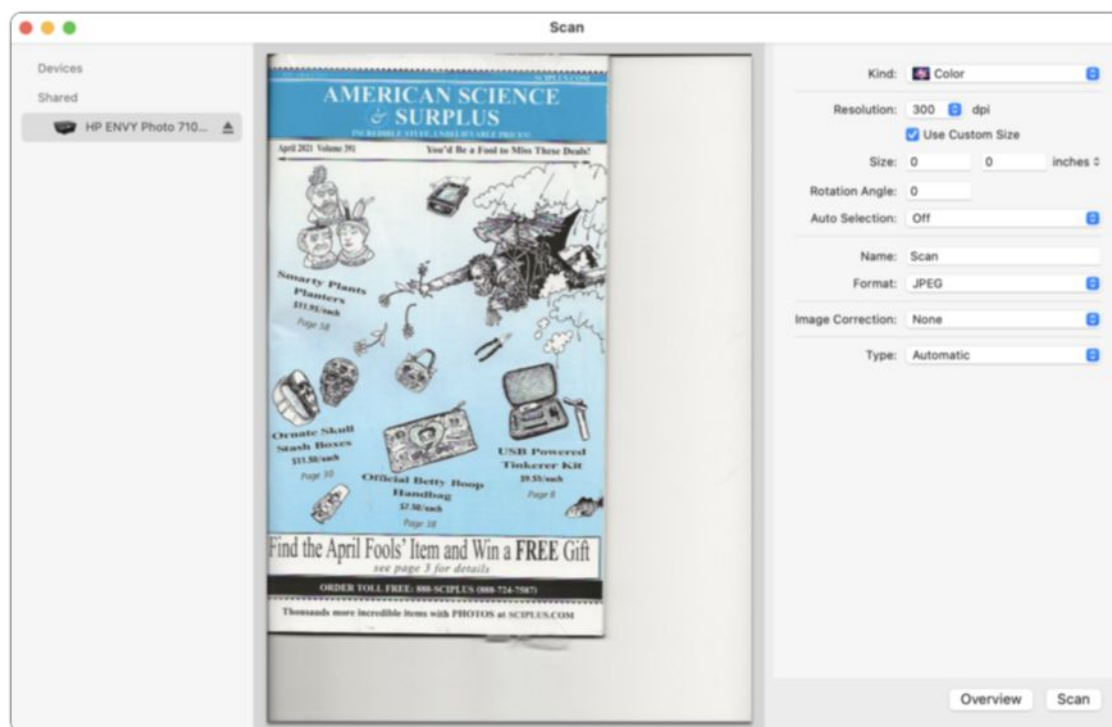


Figure 28: The Scan window has several scanner-specific options.

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.

This format determines the 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.

Tip: If your scan isn't quite on the level, you can use the Edit > Deskew Page command to straighten things out.

More Help with the Scan Options

The PDFpen online help has an excellent summary of the scanning options and their uses in its [Creating PDFs from Scans](#) topic.

Open Graphic Files as PDFs

You can also create new PDFs directly from graphic files, such as JPEG, TIFF, PNG, 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 Continuity Camera

Would you like to scan a document into a PDF but don't have a scanner? Or do you want to insert a photo into a PDF of something you have right there in front of you? If you have a recent iOS/iPadOS device running iOS 12 or later (or iPadOS 13 or later) nearby, and your Mac is running Mojave or later, you can do either, courtesy of the Continuity Camera feature that iOS, iPadOS, and macOS provide. This feature turns your iPhone or your iPad into a camera that other apps can use.

Apple describes what this feature requires in its support article, [Use Continuity Camera on your Mac](#). The article also describes the process of taking pictures and making scans with your iOS/iPadOS device.

Note: Because Continuity Camera is a feature of both macOS and iOS/iPadOS, which are regularly updated, its behavior and capabilities are particularly vulnerable to change. Consult the Apple support article for the latest Continuity Camera features.

You can find the Continuity Camera-related Import from *Device(s)* menu command on PDFpen's File menu (**Figure 29**); the exact name

of the menu item, and whether it even appears, depends on the presence of suitable iOS/iPadOS devices near your Mac.

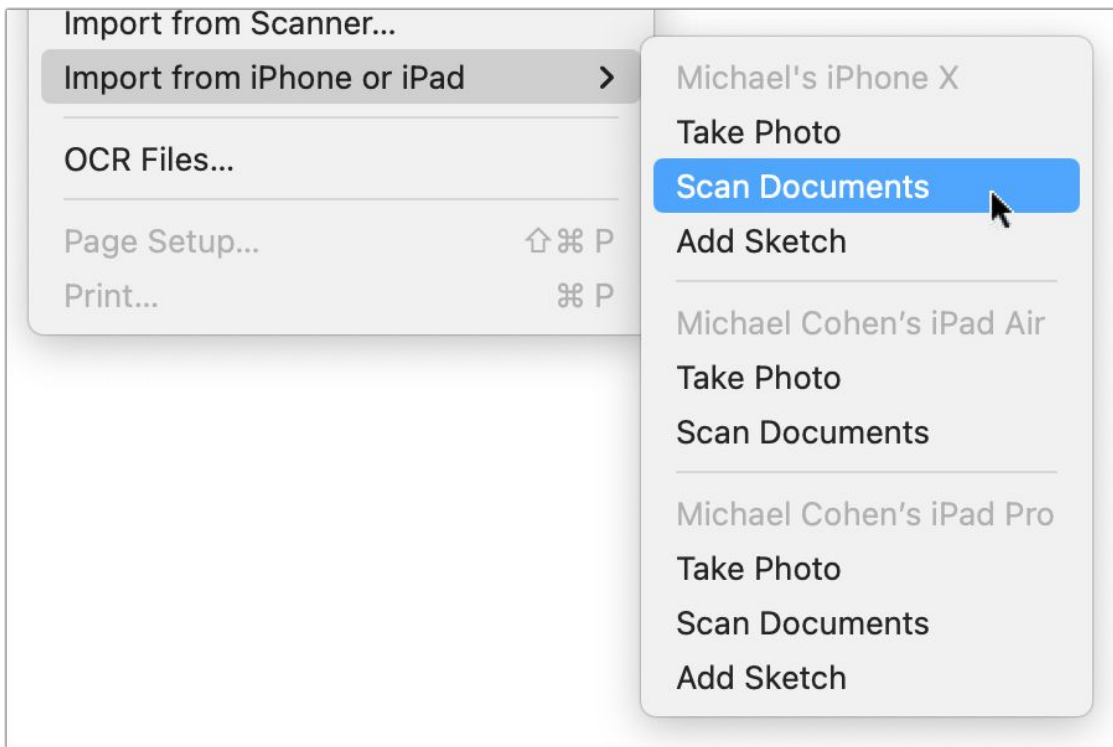


Figure 29: Nearby iOS devices show up as Import sources courtesy of Continuity Camera.

PDFpen provides as many as three commands for each device that your Mac detects, depending on the device's capabilities:

- **Take Photo:** Choose this to take a single photo. PDFpen inserts the photo into the current document on the current page, or, if there is no current document, PDFpen creates a new PDF with a page that contains the photo.
- **Scan Documents:** Choose this to take multiple photos of one or more documents and combine them as a scan. The iOS/iPadOS device provides the ability to select the portion of each image that will constitute a page of the scan. PDFpen inserts the scanned pages into the frontmost PDF document by adding pages after the currently selected page; if no PDF is open, PDFpen creates a new scanned document to contain the pages.

- **Add Sketch:** Choose this to use the drawing capabilities of your device to make a drawing that PDFpen will then import as a new page.

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](#)).

Both PDFpen and PDFpenPro can perform OCR on individual documents. In addition, PDFpenPro provides the capability of performing OCR on multiple documents at a time (see [Use OCR on Multiple Documents \(Pro Feature\)](#)).

Note: The English OCR dictionaries automatically include both legal and medical terms.

Use OCR on a Single Page or Document

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

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. Go to PDFpen > Preferences > OCR to turn on these settings (**Figure 30**).

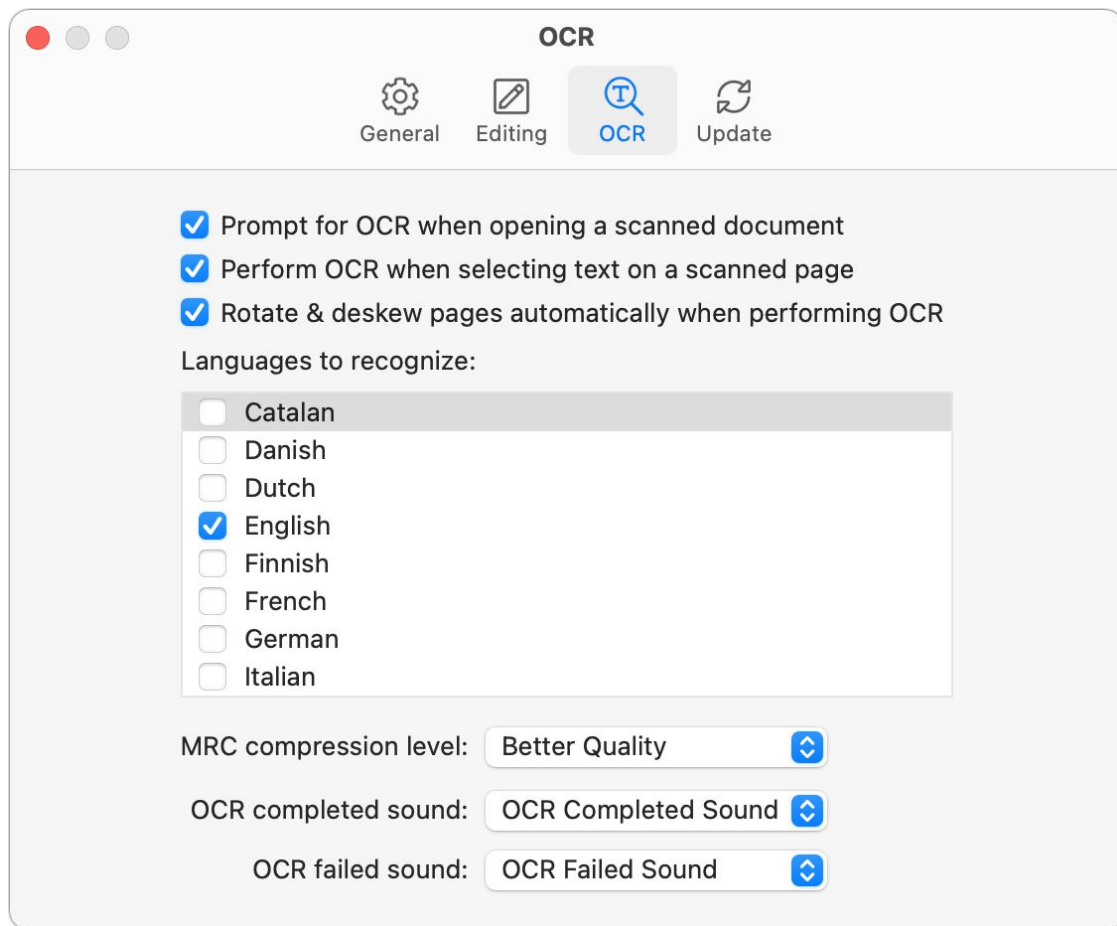


Figure 30: Set how and when PDFpen performs OCR with PDFpen’s OCR preferences.

Tip: If your scans tend to be skewed (which can often happen with scanners) check Deskew Pages Automatically When Performing OCR to have PDFpen automatically straighten the scan.

Another Tip: If file size is an issue, use the MRC compression level pop-up menu; you can choose a compromise between file size and image quality of the scanned document.

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.

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 31**).

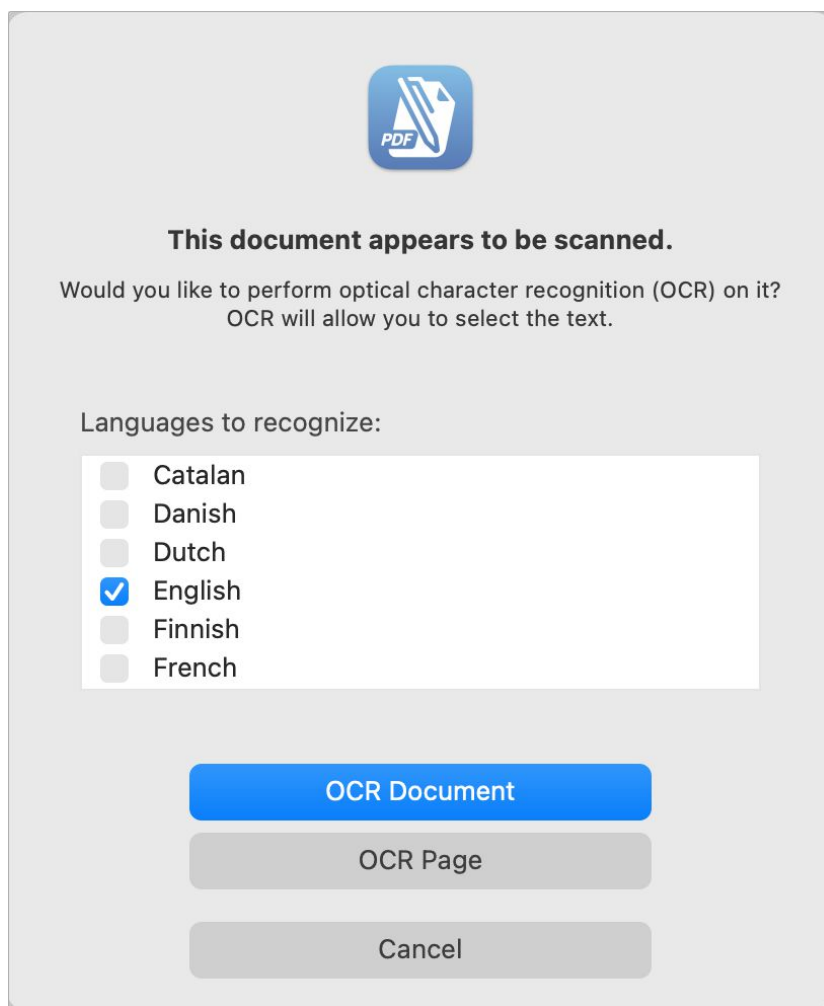


Figure 31: When PDFpen detects a full-page image, it may display this dialog, depending upon the OCR preference settings.

Tip: You can attach a PDFpen folder action script to a folder to have PDFpen automatically OCR any PDF you drop into it; Joe Kissell's [*Take Control of Your Paperless Office*](#) has this and other useful PDF-related workflow tips.

Use OCR on Multiple Documents (Pro Feature)

If you happen to have multiple PDFs on hand that don't contain selectable text, you can perform OCR on them in a batch with PDFpenPro.

Here's what you do:

1. Choose File > OCR Files. An OCR Files window appears (**Figure 32**).

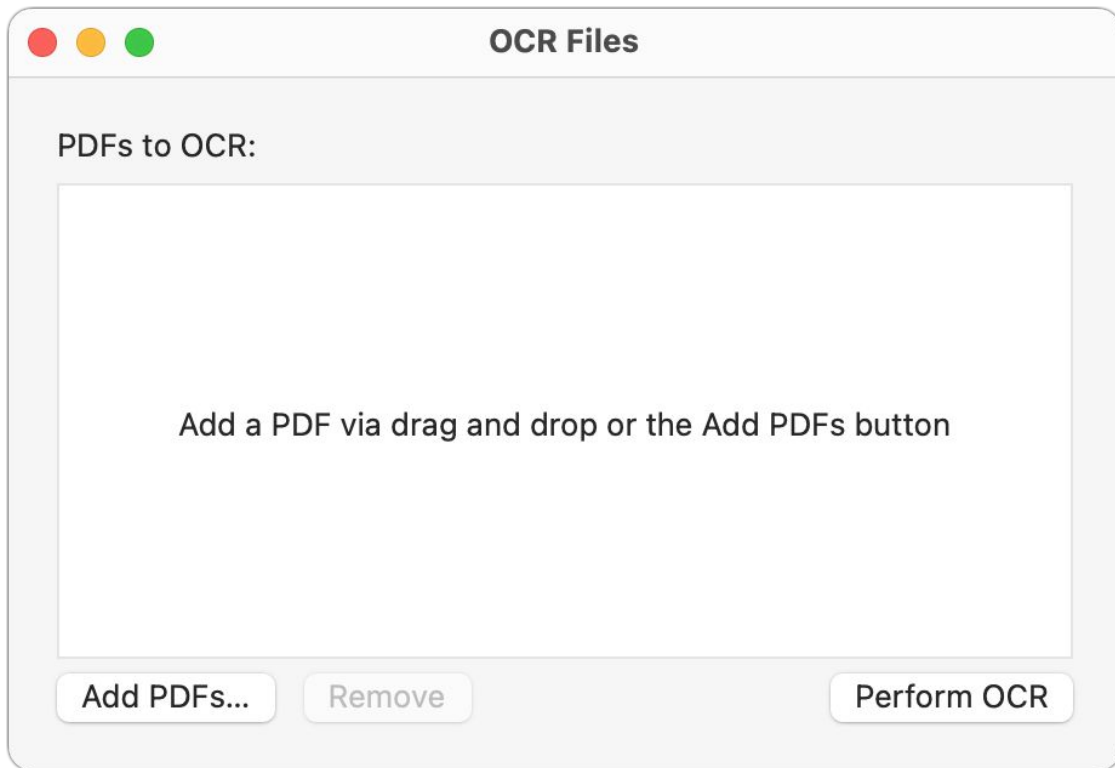


Figure 32: Add files upon which you want to perform OCR to this window.

2. Do either of the following:
 - ▶ Drag PDFs from the Finder into this window.
 - ▶ Click Add PDFs and choose the PDFs you on which you want to perform OCR from a standard file dialog.
3. Click Perform OCR.

As OCR processing completes for each PDF, a green circle appears beside its name in the list; when all PDFs in the list are processed you hear a soft tone. After recognition is complete, you can add additional PDFs to the window and perform OCR on them. PDFpenPro skips over PDFs that have been previously processed.

To remove a PDF from the list, click it in the list to select it, and then click Remove. You can remove both unprocessed PDFs and PDFs that have been previously processed.

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 likely. When OCR has been completed, the PDF's appearance doesn't change. You can view the OCR results by choosing View > OCR Layer (⌘-Shift-O), as in **Figure 33**.

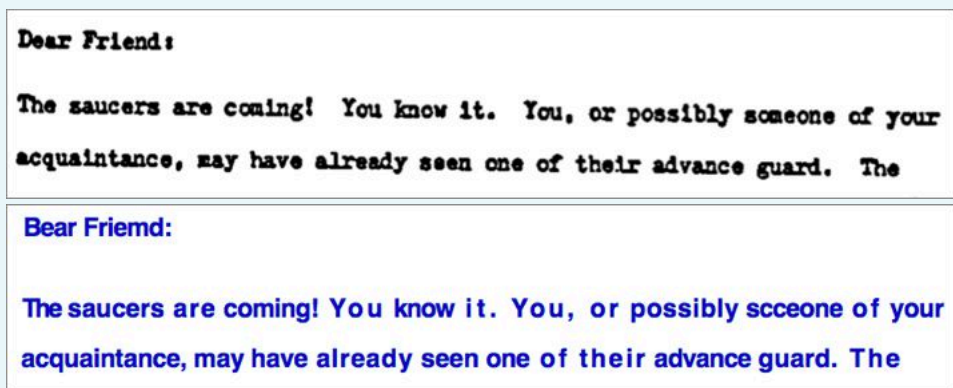


Figure 33: The first image above shows the scanned text as it appears in the PDF; below it is the OCR layer.

You can correct OCR'd text with the Correct Text tool; such corrections alter the scan's appearance by creating a text imprint (see [Add, Edit, and Remove Text](#), later). PDFpenPro, however, can make corrections in the OCR layer without creating an 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 want 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 Thumbnails 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 Thumbnails sidebar of any other PDF with PDFpen (**Figure 34**).



Figure 34: Add pages by dropping their thumbnails in a document's Thumbnails sidebar. The dragged thumbnails have a red badge that indicates how many pages are being added; a black bar in the sidebar shows the page after which the added pages will be placed.


You needn't drag pages one by one: you can Shift-click or ⌘-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 Thumbnails sidebar from the Finder. You

also can use of one or more of the supplied AppleScripts to combine PDFs (see [Appendix A: The PDFpen AppleScripts](#)).

Create Portfolios (Pro Feature)

With PDFpenPro you can create PDF portfolio documents. As described in [Navigate Portfolios](#), portfolios are often used to collect related PDFs, as well as their source or supporting documents, into a single file that can be shared with colleagues or collaborators on a project.

Here's what you can do with portfolios:

- **Create a new portfolio:** Choose File > New > Portfolio Document. An empty untitled portfolio window opens, ready to be populated.
- **Add files:** Click the add  pop-up menu at the bottom of the portfolio window and choose Add Files (**Figure 35**). Then choose the files you want to add from the file dialog that appears (you can Shift-click or ⌘-click in the dialog's file list to choose more than one file to be added).

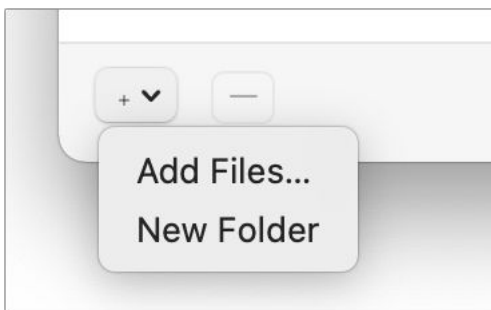




Figure 35: Add files and folders to a portfolio with the Add button at the bottom of the portfolio window.

- **Create folders:** To group files into a folder in the portfolio, create the folder before you add the files; choose New Folder from the add  pop-up menu. You can click the folder's name to select and rename it, and you can create folders within folders.

- **Remove files and folders:** Select them (Shift-click or ⌘-click to select multiple items) and then click the delete  button.

Tip: Choose Edit > Undo (⌘-Z) to undo an unintended deletion.

When you finish working with the new portfolio, simply close the window: PDFpenPro prompts you to name the portfolio and choose where to save it.

To save the portfolio but continue to work with it, click Save at the bottom of the window: the portfolio is saved with the name you give it and in the location you specify, but the window remains open.

Make PDFs from HTML (Pro Feature)

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

1. Choose File > New > From HTML.

The New From HTML dialog appears (**Figure 36**).

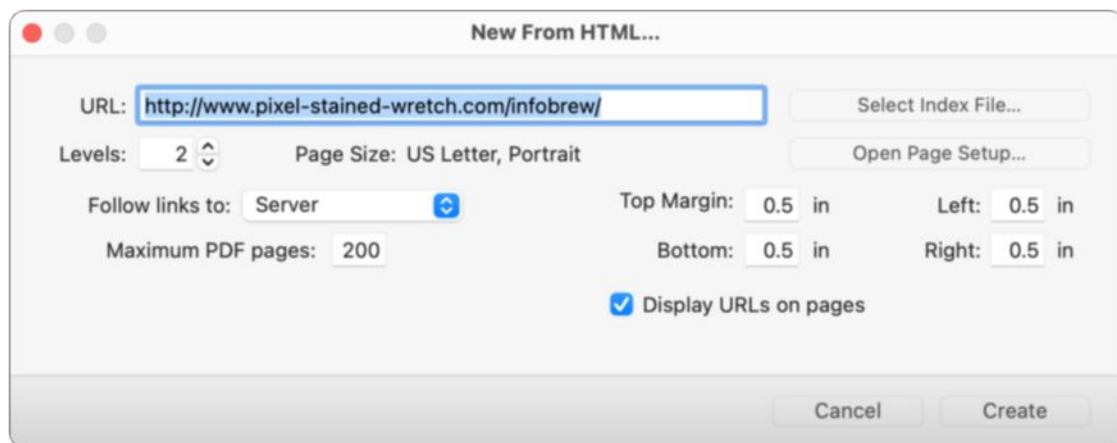


Figure 36: You can create a PDF from one or more webpages.

2. Do one of the following, depending on whether the website is located on the Internet or stored locally:
 - ▶ **On the Internet:** Enter the URL of the webpage 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 webpage and produces PDF pages from those linked webpages. A setting of 3, as you might expect, follows links on the linked webpages 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 webpage's URL.

For example, if the starting URL is <https://www.example.com/dir1/index.html>, then the linked pages <https://www.example.com/dir1/somepage.html> and <https://www.example.com/dir1/dir2/apage.html> would be included in the PDF, but a linked page found at <https://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 webpage's URL. For example, if <https://www.example.com/dir1/index.html> is the URL for the first page in the PDF, the linked page <https://www.example.com/dir2/apage.html> would be included in the PDF, but a linked page at <https://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 website.

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 37**) to fine-tune the entries.

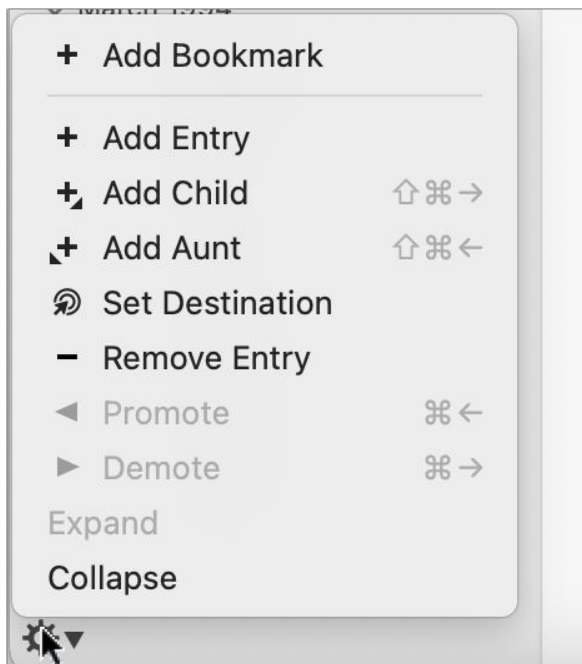



Figure 37: Use PDFpenPro’s Table of Contents action menu to edit a document’s table of contents.

Tip: The same menu items also appear both on the Edit > Table of Contents submenu in PDFpenPro and in a contextual menu when you Control-click the Table of Contents sidebar.

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. From 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 change 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 ways to 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 38**).

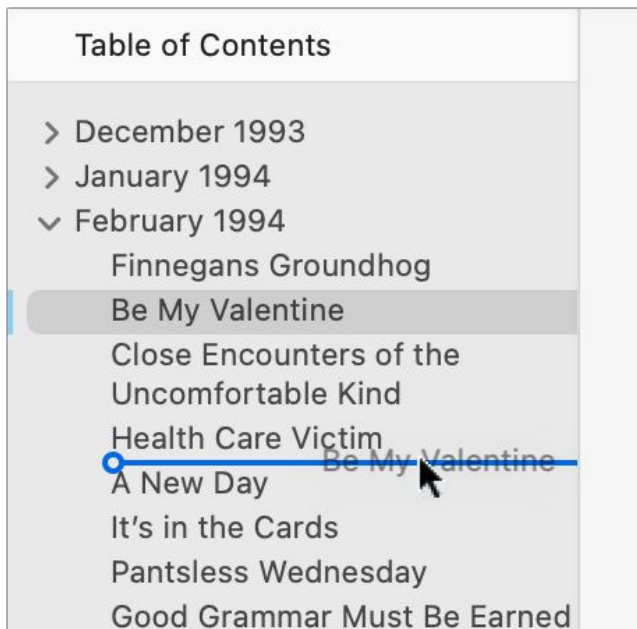


Figure 38: Drag to reposition a table of contents entry.

- **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.

Tip: With PDFpenPro you can select multiple Table of Contents entries to reorganize multiple entries at a time. Use Shift-click to select a range of entries, and ⌘-click to select discontinuous entries.

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 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, as well as how to [Record Sound Annotations](#).

This chapter also explains how to [Print Notes and Comments](#) and how to use the sidebar to [Select, Copy, and Delete Annotations](#).

You can even include related materials that comprise entire documents, as [View, Extract, and Add Attachments](#) explains.


Note: If your goal is to edit or review a PDF, don't stop with the tools discussed in this chapter. The next chapter, [Copyedit and Review a PDF](#), is also for you.

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 three customizable colors. You can also highlight text with three kinds of lines.

Highlight in Color

As you learned in [The Markup Tools](#), you use the Highlight  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 on the toolbar.

Here's one way to highlight text:

1. Choose Tools > Highlight Text Tool.
2. On the toolbar, from the Highlight  tool pop-up menu, choose a highlight color (**Figure 39**).

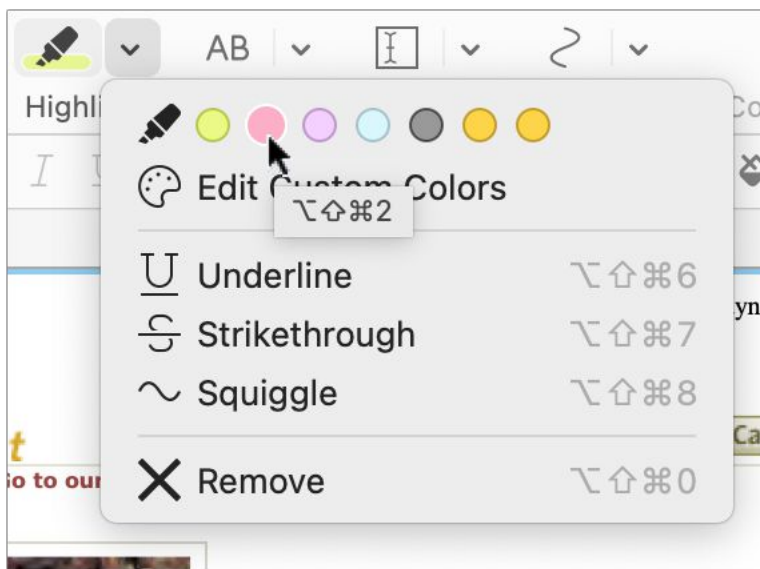






Figure 39: Select a highlight color from the Highlight  tool's pop-up menu. Note the keyboard shortcut that appears as a help tag when you point at a color.

3. Select some text in the PDF.

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



However, you don't need to use the Highlight  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  tool. To apply a highlight color to selected text, type **⌘-Option-Shift-a** *number from 1 to 5*, which correspond to the four standard highlight

colors and the first custom color. You can see the highlight color keyboard shortcuts when you point at a color on the Highlight  tool's pop-up menu, as shown just above in **Figure 39**.



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  tool's pop-up menu on 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 ⌘-Option-Shift-0 (zero). (The Remove command with that shortcut appears on the Format > Highlight submenu and on the Highlight  tool's pop-up menu.)

Set a Custom Highlight Color

If the four standard highlight colors don't appeal to you, you can specify as many as three custom highlight colors. These colors are set in PDFpen > Preferences > Editing and, once set, are available in all documents you subsequently open. As with any other highlight color, when you set a custom highlight color it remains the default highlight color until you select a different highlight color.

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

Here's how to set a custom highlight color:

1. Do either of the following:
 - ▶ Choose PDFpen > Preferences > Editing.
 - ▶ Choose Edit Custom Colors from the Highlight  tool's pop-up menu on the toolbar.
2. Near the bottom of the Editing pane, click one of the Custom Highlight Color swatches.
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 a Custom Highlight Color take immediate effect, so you can try various settings without closing the Preferences window.

Find and Highlight

PDFpen provides the Edit > Find > Find and Highlight command (⌘-Option-Shift-F) for those cases where what you want to highlight can be boiled down to an exact word or phrase (**Figure 40**).



Figure 40: The Find and Highlight command gives you both search and highlighting capabilities in the Highlight window.


With this command, you can highlight individual occurrences of found text, highlight all occurrences of that text, or just find the text without

highlighting. You can choose the highlight color from the four standard and three custom colors in the Highlight search window.

Note: The highlight color you choose in the Highlight window does not affect the highlight color currently assigned in the PDFpen window's toolbar.

Underline Passages

If the seven 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 on the toolbar's Highlight  tool's pop-up menu. The three types of highlight lines are shown in **Figure 41**.

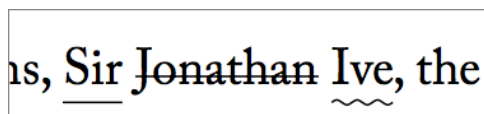



Figure 41: You can use three kinds of lines to highlight text.

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


- **Underline:** This is a simple text underline. If the PDF already contains underlined text (using underlines to indicate italics is a standard manuscript convention), you probably want to avoid using it. Otherwise, an underline serves as a subtle highlight that's not as obvious as a colored highlight. You can underline selected text by typing ⌘-Option-Shift-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 ⌘-Option-Shift-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. ⌘-

Option-Shift-8 is the keyboard shortcut for applying a squiggle underline to selected text.

You can set the line highlight color by selecting the line highlight style you want from the toolbar's Highlight  tool's pop-up menu and then choosing a stroke color from the Editing Bar, as described in [The Object Property Tools](#). The color you choose remains the default line highlight color until you change it.


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 three different tools for adding textual commentary to a PDF: the Note tool the Comment tool, and the Comment tool's variant, the Cloud tool). You can also attach sound annotations. You can access any of these from the Annotation  tools pop-up menu on the toolbar or from the Tools menu.

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](#)).

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 double-clicking the note icon with the Edit  tool. 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 with the contents of the note (**Figure 42**).

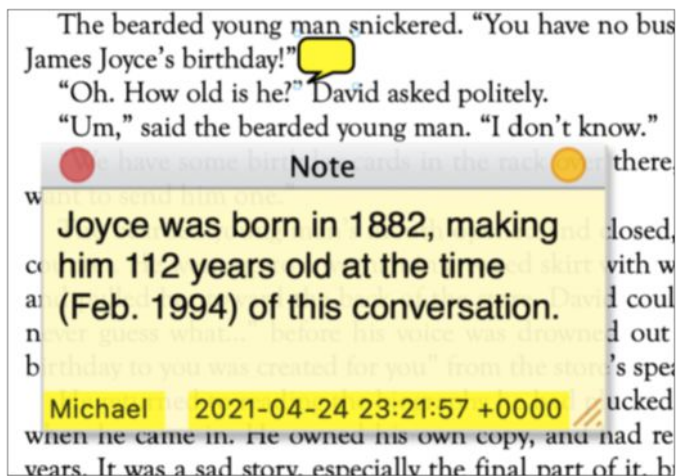






Figure 42: A note consists of an icon and its associated window.

Notes are also useful when more than one person is commenting on the PDF. As you can see in **Figure 42**, 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 > Preferences > Editing.

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

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

1. On the toolbar, choose the Note  tool from the Annotation **AB** tools pop-up menu.
2. Click on the page where you want 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, double-click the note icon.

To delete a note, click the trash  icon on the right side of the note's title bar (the trash icon appears when you hover your pointer over it), or click the Note  icon in the document body to select it and then press Delete.

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 and Clouds

When you need to add short commentary that always remains visible on the page, add a comment box (**Figure 43**).

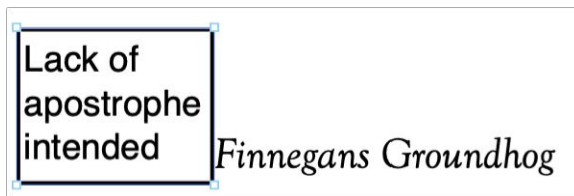




Figure 43: A comment box always appears on the page.


Comment boxes use the default font (set in PDFpen > Preferences > Editing), and use the text color, stroke color, fill color, stroke style, and stroke width set in the Editing Bar's object property tools (see [The Object Property Tools](#)).

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

1. On the toolbar, choose the Comment  annotation tool from the Annotation **AB** tools pop-up menu.
2. Click in the document body 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.

PDFpen provides an alternative shape for the comment frame: a cloud.



The steps for making a cloud comment are almost exactly the same as those for a comment box. The only difference is that you choose the

Cloud  annotation tool instead of the Comment  annotation tool in the steps listed above.


Cloud comments can have custom stroke widths, border colors, and fills just like comment boxes (**Figure 44**).



Figure 44: If you need a more distinctive comment box, put your comment in a cloud.



Tip: Having the Cloud  annotation tool as an alternative to the Comment  annotation tool is convenient if you have two classes of comments (such as queries and suggestions) and want an easy way to make them visually distinct.

Record Sound Annotations

Perhaps you're more of a verbal person and can say what you think better than you can write it. Or maybe you want to provide a recording of transcribed text in a PDF. Whatever your reason, you can provide listenable annotations with the Sound  annotation tool in PDFpen.

Note: Not all PDF viewers, including Preview in macOS 11 (Big Sur), can play sound annotations. In addition, sound annotations are stripped out if you modify and save the PDF using such an app.

To add a sound annotation to a PDF, do the following:

1. On the toolbar, choose the Sound  annotation tool from the Annotation **AB** tools pop-up menu.
2. Click where you want to place the sound annotation.
3. In the dialog that appears (**Figure 45**), click the record  button to begin recording your annotation.

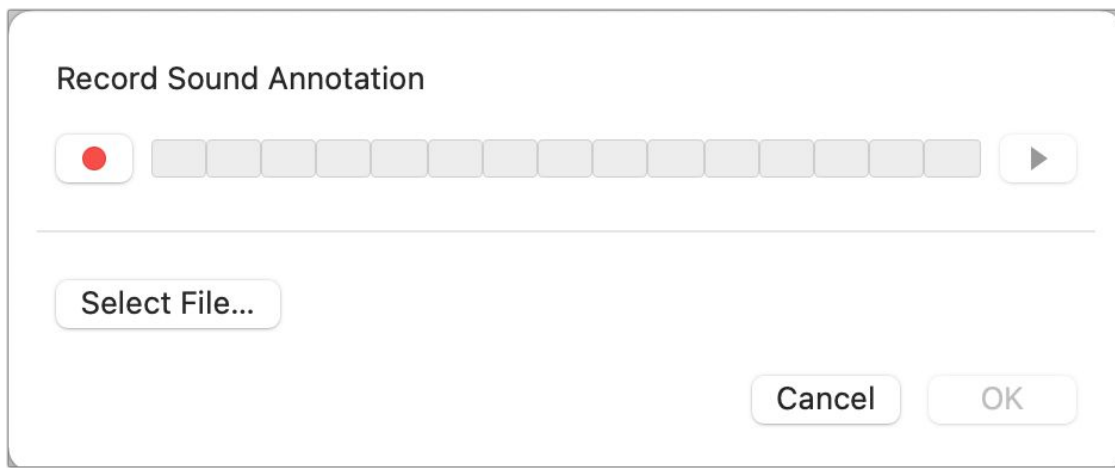





Figure 45: This dialog appears when you place a sound annotation.

4. Click the stop  button to conclude the recording.
5. Optionally, click the play  button to review your recording.
6. Click OK to save the annotation in the document.

As an alternative, you can click Select File in the recording dialog to attach a pre-recorded file as a sound annotation.

Note: PDFpen can import uncompressed AIFF files, either stereo or monaural, at 8-, 16-, or 24-bit resolution (24-bit files will be converted to 16 bits).

To play back a sound annotation, click the annotation marker in the PDF, and then click the play  button that appears (**Figure 46**).

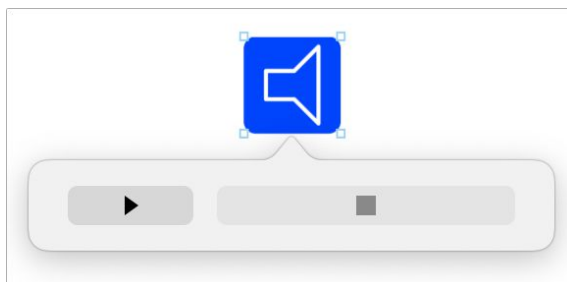


Figure 46: Playback controls appear when you click a sound annotation.

Tip: You can change the color of a sound annotation marker with the Editing Bar's object property tools (see [The Object Property Tools](#)).

Print Notes and Comments

When you print a PDF, you have control over whether the notes and comments print. **Figure 47** shows the relevant portion of PDFpen's Print dialog; you may have to choose PDFpen from the dialog's lower pop-up menu to see it.

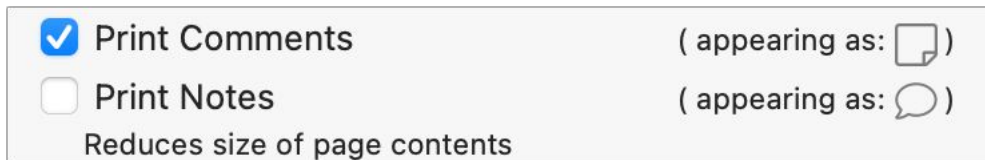


Figure 47: You can control whether notes or comments print using these options on the Print dialog.

Here's what the options do; they are both unchecked by default:

- **Print Comments:** Select this to have the comments print in the exact location where you placed them on the page.
- **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.

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.

Select, Copy, and Delete Annotations


As described in [Navigate with Annotations](#), you can use the sidebar to see and move among a PDF's annotations. You can also use the sidebar to select annotations: click to select a single annotation, Shift-click to select a contiguous range of annotations, and ⌘-click to select discontinuous annotations.

Once you have one or more annotations selected you can do the following:

- **Delete:** Choose Edit > Delete, or just press Delete, to remove the selected annotations from the PDF. Deleting multiple annotations at once is an easy way to clean up a previously marked-up PDF when the annotations it contains are no longer relevant to you. You might also use this capability when you make a duplicate of a marked-up PDF, such as one you have annotated for your own purposes, so that you can give that clean copy to someone else for review.
- **Copy as text:** Choose Edit > Copy As Text (⌘-C) to copy the text contained in the selected notes and comments, as well as the text of selected highlights, to the clipboard. Copying the text of multiple annotations is useful when one or more notes or comments contain substantive material that you may want to use elsewhere. For example, you can copy a reviewer's comments and queries from the PDF so you can paste them into an email response to that reviewer. You could also highlight important passages in a PDF document and then copy the highlighted text to obtain a quick summary of the document's main points.

Note: Remember that the text you see in a PDF can be stored as multiple text objects that might not be arranged in the same order as you see on the page (see [A Peek at What Is Inside](#)). Thus, text passages copied from highlights may appear somewhat garbled or out of order and require editing.

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 Draw Tools](#)) or the toolbar's Highlight  tool.

Draw on the Page

You can easily create elaborate eye-catching graphics with PDFpen's drawing and object property tools. For example, **Figure 48** 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).

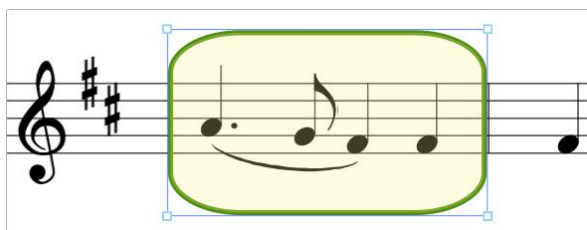


Figure 48: Draw attention to important information with the drawing and object property tools. The drawn object shown here is selected, showing its bounding box with control points at the corners.


And since I've been nattering on about the object property tools, **Figure 49** shows them on the Editing Bar:



Figure 49: The object property tools control how an object's fill and stroke appear; from left to right they control stroke and fill 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 want 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 50**). Note, however, that freeform highlights are locked in place when you draw them; to unlock them so you can move, select, and delete them, choose Arrange > Unlock All.



Figure 50: You can draw freeform highlights.

Note: You don't need to unlock freeform highlights to select and delete them with the Annotations sidebar; see [Select, Copy, and Delete Annotations](#).

Draw Callouts

A “callout” is a short bit of text, usually bordered, connected by a line or similar indicator to a passage of text or to some part of a diagram or illustration (**Figure 51**).

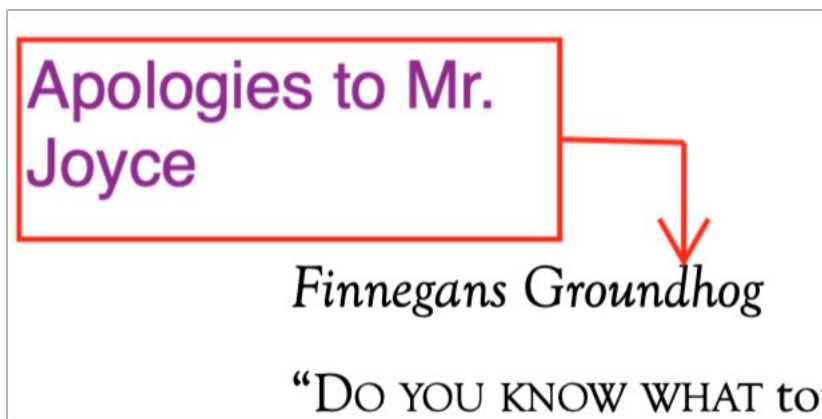





Figure 51: A callout associates a text box comment with a PDF's content via an attached line.

Although callouts are easy enough to create from scratch with the comment box and line tools (see [Draw on the Page](#) and [Add Comment Boxes and Clouds](#)), you don't have to build them from parts: PDFpen's Callout  annotation tool make them for you, completely assembled.

To make a callout:

1. Choose Tools > Callout, or choose the Callout  annotation tool from the toolbar's Annotation  tools pop-up menu.
2. Click the PDF where you want the callout's line to point and then drag to where you want the callout's text box to appear.

You can edit the text in the callout's text box and adjust the text's appearance with [The Text Format Tools](#). Similarly, you can use [The Object Property Tools](#) to adjust how the box and its attached line look, including the box's background color, the stroke width and style of the box border and its line, and what kind of symbol (such as an arrow-head) appears at the end of the line.

The callout's text box has control points at each corner that you can drag to adjust the box's size and shape.

Note: The callout's text box automatically expands to fit the text you type in it, but you can use the corner control points to reshape the box as you see fit.

The callout's line includes a control point that you can drag to change the angle at which the line bends and how far from the box it bends; you can drag the point around the box to change the side of the box from which it originates.

View, Extract, and Add Attachments

With PDFpen you can view and extract whole files that have been attached to a PDF, and with PDFpenPro you can add and delete such attachments. For example, when sending a PDF letter to shareholders that includes a section on the quarterly results, you might include the

company's most recent EDGAR filing with the Securities and Exchange Commission as an attachment. Files can be attached to a PDF as a whole, or attached to a specific place in the PDF as an annotation.

View and Extract File Attachments

When a file attachment is placed as an annotation, it appears as a paperclip icon in the PDF (**Figure 52**). The person who produced the PDF may also pair the attachment annotation with a comment explaining what the attachment contains: that is considered a good practice, but is not mandatory. File annotations appear in the Annotations sidebar like any other annotation (View > Annotations); they also appear in PDFpen's Attachments sidebar (View > Attachments).

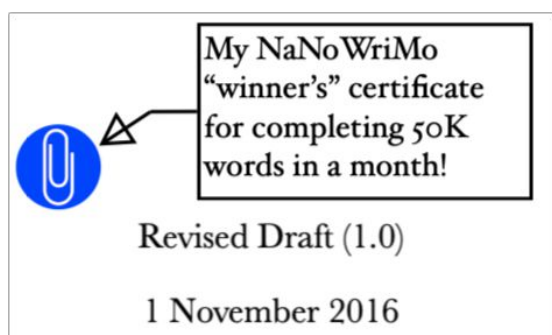



Figure 52: A file attachment annotation appears as a paperclip symbol in the PDF; as a courtesy, a separate comment annotation has been added at right to explain what the attachment contains.

When a PDF has file attachments that are *not* linked to a visible annotation, such attachments don't appear in the Annotations sidebar but do appear in the Attachments sidebar (**Figure 53**). These attachments lack the paperclip  icon.

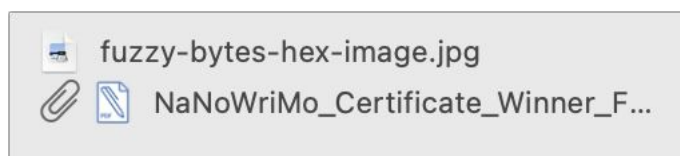



Figure 53: Two attachments appear in this picture of the Attachments sidebar. The attachment at the top is not an annotation and thus lacks an Attachment  icon to its left. The second attachment, which is an annotation, has an icon.

To work with attachments, whether annotations or not, display the Attachments sidebar (View > Annotations), then Control-click the attachment and choose from the menu that appears (**Figure 54**).

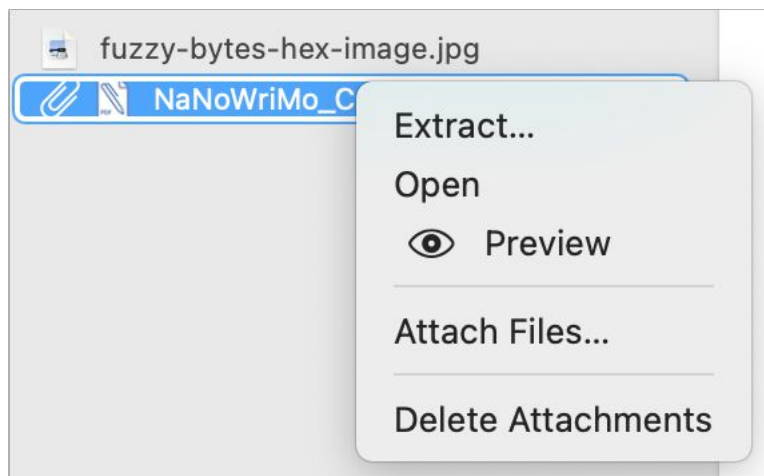




Figure 54: Use this contextual menu to work with attachments. Note that the last two menu items are PDFpenPro features and not available in PDFpen.

You can also access these menu commands by selecting the attachment in the sidebar and clicking the action  pop-up menu at the bottom of the sidebar. In either case, these are your choices in PDFpen:

- **Preview:** See what the attachment contains.
- **Open:** Open the attachment in the appropriate app on your Mac.
- **Extract:** Save the attachment as a separate file on your Mac.

Add and Delete File Attachments (Pro Feature)

With PDFpenPro, you can also add and delete file attachments.

To add a file attachment as an annotation, choose the Attachment  annotation tool from the toolbar's Annotation **AB** tools pop-up menu, and then click on the document page. A file dialog appears from which you can choose the file to attach.

Tip: When you make a file attachment annotation, it is considered a good practice to also add a comment box (⌘-8) near it that describes what the attachment contains.

To add a file attachment *without* displaying it as an annotation, choose Edit > Attachments > Add Attachment, and then select the file from the dialog that appears.

To delete a file attachment, Control-click it in the Attachments sidebar and then choose Delete Attachments; alternatively, you can select it in the sidebar and then choose Edit > Attachments > Remove.

Note: You can choose Edit > Undo to undo the deletion of an attachment.

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

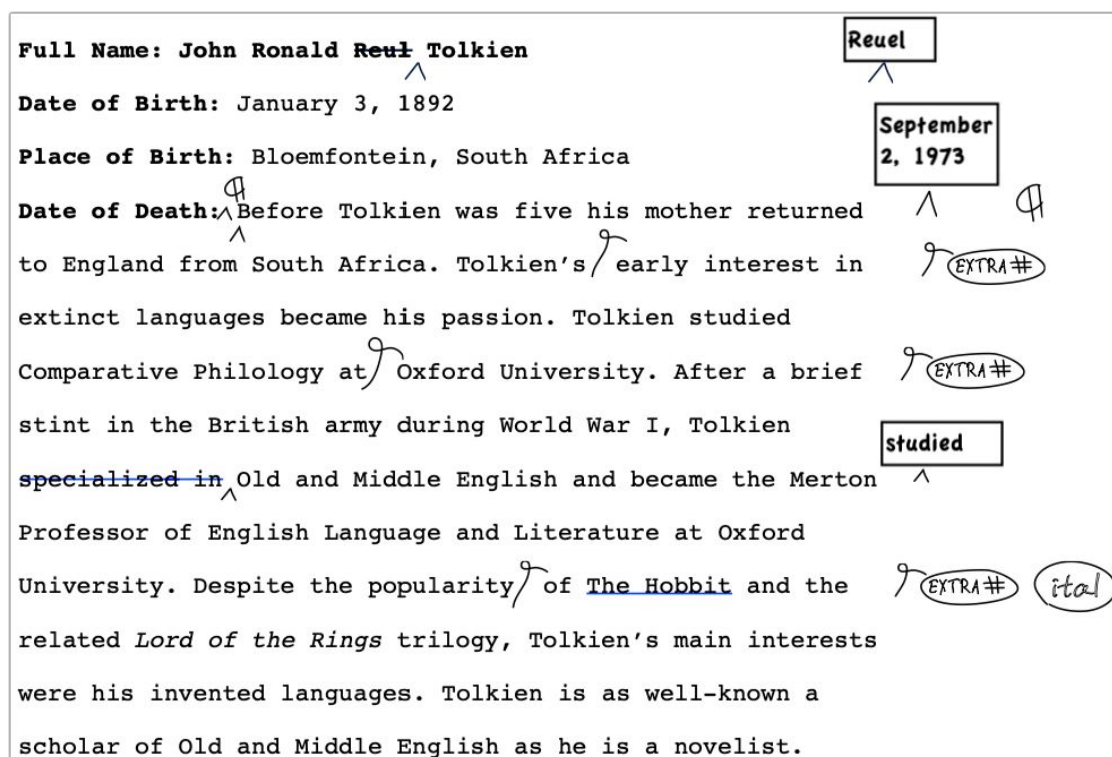


Figure 55: Proofreading marks indicate insertions, deletions, and format changes.

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

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  on the toolbar.
2. In the Library window, click the Proofreading  icon (**Figure 56**).



Figure 56: 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 56**, 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 55**, a page or so back) 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 55**, a few pages back, shows several examples).
- Use a deletion mark in the margin to indicate deletions, and use the Strikethrough line highlight (available on the Highlight  tool's pop-up menu; see [Underline Passages](#)) 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 (see [Add Comment Boxes and Clouds](#)) to indicate brief suggestions, but make them a different color than any comment boxes used for inserted text.
- Place note icons (see [Add Pop-Up Notes](#)) 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 to avoid clutter.

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.

Tip: The ability to copy the contents of multiple annotations, as described in [Select, Copy, and Delete Annotations](#), becomes particularly useful when you need to collect the notes and suggestions from multiple reviewers.

- **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 on 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 scrolling note window gives you ample room to expand upon your thoughts, be succinct. The editor and the writer both must deal with comments from many reviewers, and, as a manuscript nears completion, time is 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 and what they can ignore as they review the document. 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 on screen, 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 text cursor in the box so you can type your information directly into the form (**Figure 57**). 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 See Specific Instructions on page 2. | Name (as shown on your income tax return) |
| | Harrison Bergeron |
| | Business name/disregarded entity name, if different from a |
| | Vonnegut Enterprises |
| | Check appropriate box for federal tax classification: |
| | <input checked="" type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> Limited liability company. Enter the tax classification <input type="checkbox"/> Other (see instructions) ► |
| Address (number, street, and apt. or suite no.) | |
| 1313 Mockingbird Lane | |
| City, state, and ZIP code | |

Figure 57: 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.

Note: If the interactive form includes a signature field, skip ahead to [Sign Forms Digitally](#) to see how to use a digital signing certificate.

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 58**).

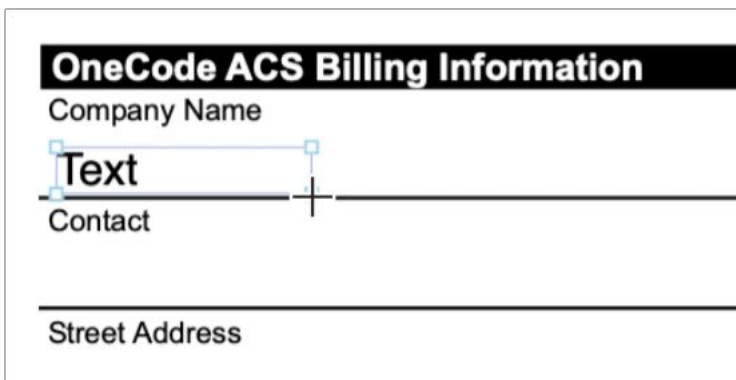


Figure 58: Place a text imprint over a text entry area in a non-interactive PDF form.

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

1. With the Text **AB** annotation 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](#). Also, If Snap to Guides is enabled, and you create the imprint near an underlined area on the form, your imprint will snap into place on the line; see [Use Guides](#).

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 **AB** annotation 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:

1. If the Fonts panel is not already visible, choose Format > Font > Show Fonts (⌘-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 59**).

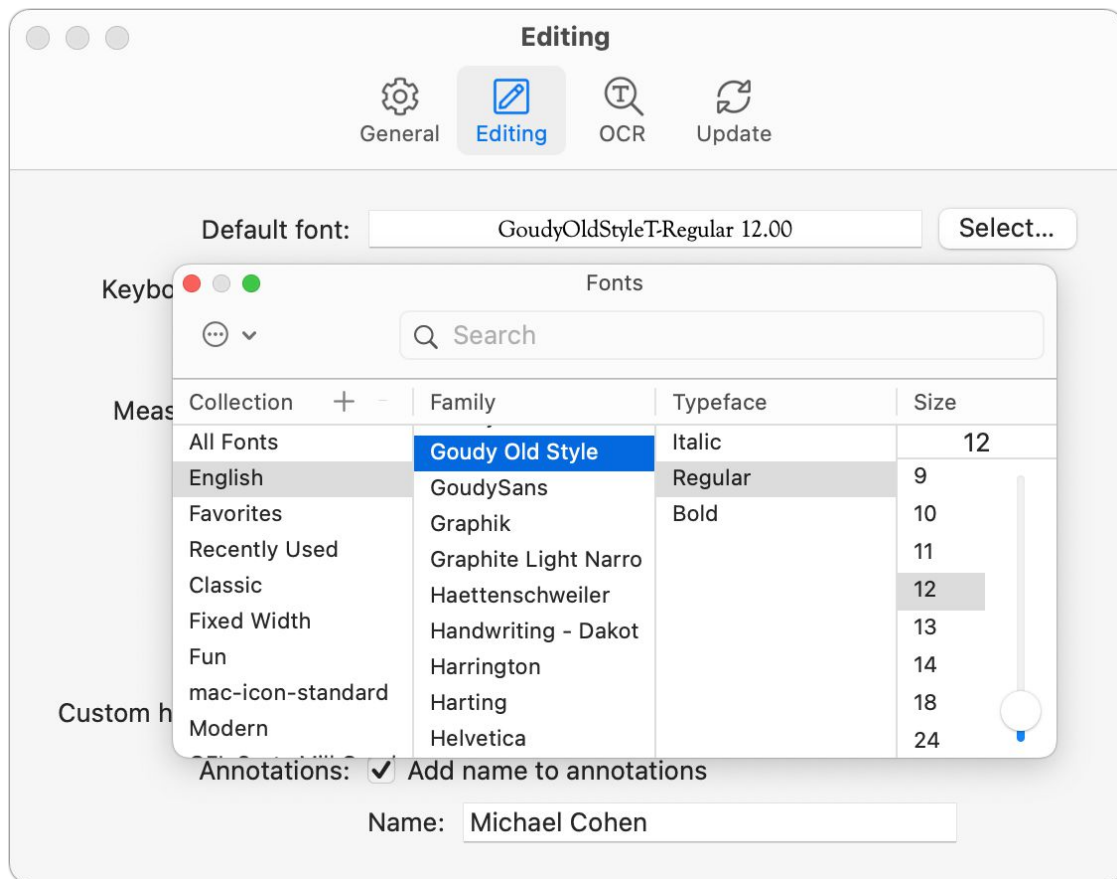


Figure 59: Set PDFpen’s default font on the Editing preference pane.

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



If you want, 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  draw tool to hand-draw a check mark, or use the Polygon  draw 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 create 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 60**).

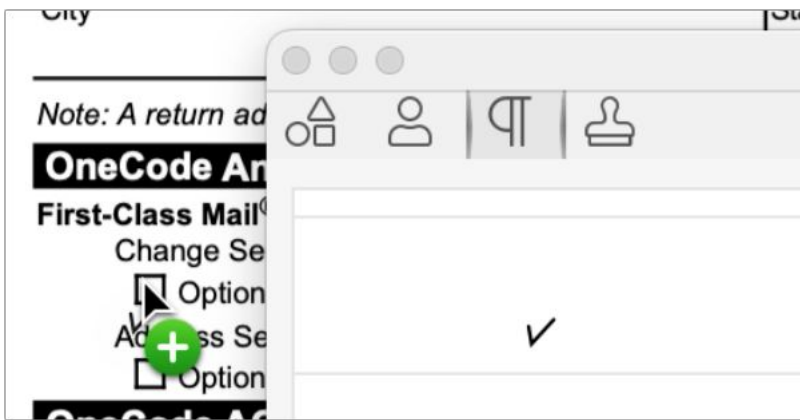




Figure 60: Steal a check mark from the Library's Proofreading Marks collection to check off boxes in a form.

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

1. Choose Window > Library or click Library  on the toolbar, and then, in the Library window, click the Proofreading Marks  icon.
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. Adjust its thickness and color with [The Object Property Tools](#) if necessary.

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 imprint (**Figure 61**) to a PDF form within PDFpen and avoid the printing step.



Figure 61: Sign a PDF form with a signature image.

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.

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 a Signature” in PDFpen’s [online help](#).

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](#).

Sign Forms Digitally

Some interactive PDF forms (such as those made by PDFpenPro or Adobe Acrobat) can include interactive signature fields. These allow you to write your signature with a trackpad or stylus right on the form and, optionally, affix a digital signing certificate that verifies the document has not been altered after signing and that it verifiably came from the party who signed it.

Tip: Smile has a [blog post](#) that describes in detail what constitutes a digital signing certificate and the levels of trust such certificates provide.

Write Your Signature

When you open a form with an interactive signature field in PDFpen, the field indicates where you click to sign (**Figure 62**).



Figure 62: PDFpen uses a “Sign Here” stamp to show where to sign.

Click the field and a signature dialog appears. To sign with a trackpad, click once in the dialog’s signing area and then scribble your signature with your fingertip or with a stylus if your trackpad supports it (**Figure 63**). To finish signing, double-click in the dialog’s signature area.

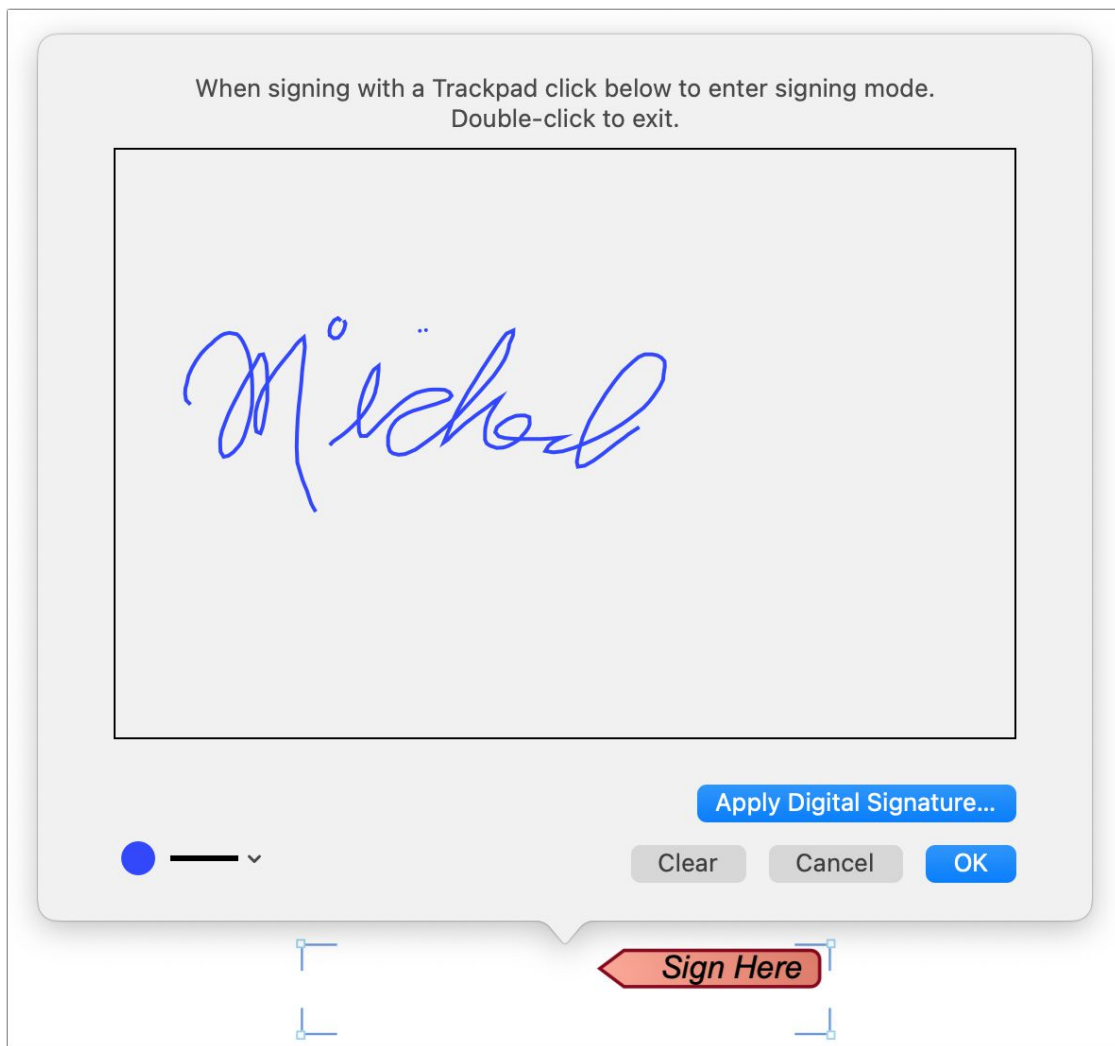


Figure 63: Scribble in the dialog with your fingertip to sign a document. Use the controls at the bottom left to set the line-width and color of your signature.

The signature area roughly represents the surface of your trackpad: for example, you have to begin writing at the left side of the trackpad for your signature to start at the left side of the on-screen signature area. Note that you can avoid scrawling a finger-painted signature if you have a scanned signature in your Library (see [Add a Scanned Signature](#)): just drag the signature to the dialog's signature area.

Apply a Signing Certificate

When you write your signature on an interactive form, you have the option of applying a digital signing certificate by clicking Apply Digital Signature in the signature dialog. The resulting dialog displays a pop-

up menu from which you can choose among the digital certificates in your Mac’s keychain to serve as your “signing identity” (**Figure 64**).

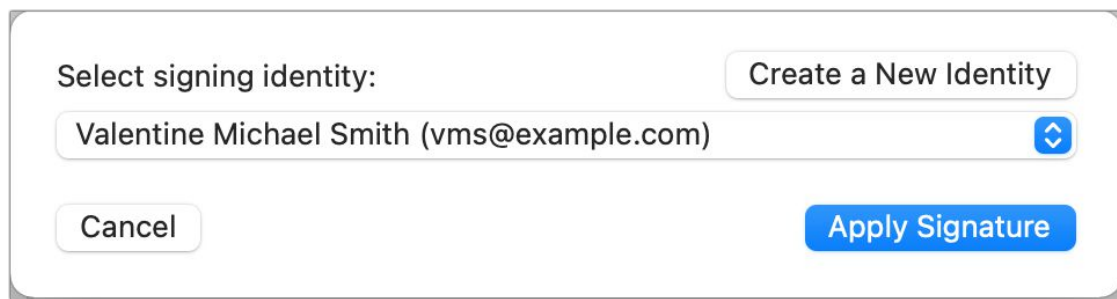


Figure 64: Choose who you want to be with the digital signing identity dialog.

Note: You must draw or drag a signature into the signing area to enable the Apply Digital Signature button.

It’s likely that you have a number of possible identities in your keychain. However, most of them are probably of little use as digital signatures. In fact, Adobe Acrobat and Adobe Reader only “trust” digital signing certificates generated by an authority on the Adobe Approved Trust List (AATL).

Tip: In [its blog](#), Smile describes in detail the steps you need to perform to purchase and install an AATL signing certificate.

Using an AATL signing certificate verifies that the PDF does come from the person it says it came from, and that it has not been altered in any way after the certificate was applied (see [Using and Trusting Signing Certificates](#) ahead).

If, however, you don’t want to go to the trouble and expense of purchasing an AATL signing certificate, you can create what’s known as a “self-signing” certificate. The recipient of the PDF can see who the certificate purports to be from, but it is not necessarily trusted.

To create a self-signing certificate, click Create a New Identity in the digital signing identity dialog, and then, in the dialog that appears, provide a name (preferably yours or your organization’s) and an email address. Those items will be available to the PDF’s recipient.

Once you have created a self-signing certificate, it is placed in your keychain so you can use it again.

Note: As soon as you apply a signing certificate, PDFpen locks the PDF so you can no longer alter it.

Warning! Apple’s Preview does not respect signing certificates and allows you to modify signed PDFs. Once a PDF has been modified, PDFpen no longer “sees” its signing certificate.

Using and Trusting Signing Certificates

When you apply a signing certificate to a PDF, or receive one that has been signed, a badge appears on the PDF to indicate the level of trust the certificate ensures: yellow means signed but not necessarily trusted; green means signed and trusted (**Figure 65**).



Figure 65: A green badge (left) means trusted; a yellow badge (right) means signed but not trusted.

Note: Documents signed with a self-signing certificate that you have created will always show up as being trusted when you open them in the same user account in which you created the certificate. However, the certificate won’t appear as being trusted for anyone else.

Because a digitally signed document purports to be unchanged following its signing, you cannot edit a signed document in PDFpen: when you open one, PDFpen informs you of this (**Figure 66**).

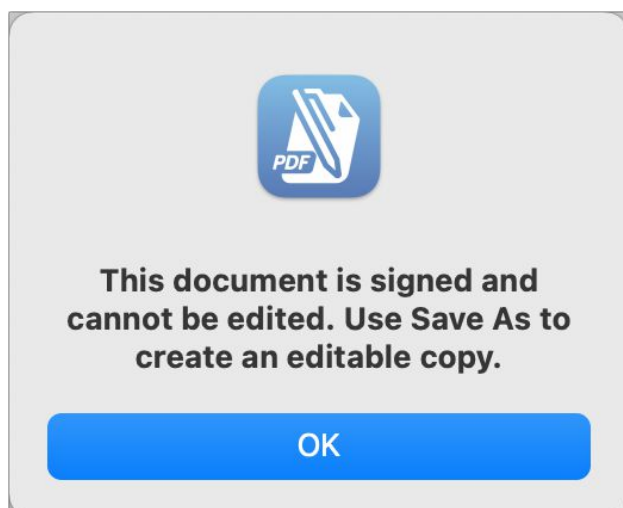


Figure 66: Digitally signed documents are not to be altered.

You can examine the certificate of a digitally signed document by clicking its badge: a dialog appears to inform you of the certificate's authenticity. For trusted documents, you see a preview of the certificate's contents.

For untrusted documents, on the other hand, the dialog simply tells you that the certificate is untrusted but gives you the option to examine the certificate by clicking Show Certificate. When you click that button, PDFpen adds an Always Trust checkbox to the dialog in addition to supplying details about the certificate. If, after examining the certificate, you feel it is trustworthy, you can check that checkbox, and, from then on, any PDFs you receive that use the same certificate will be trusted by PDFpen.

Signing Your Own PDFs

How about the case where you want to send someone a digitally signed PDF that you created so the recipient can verify that it came from you? Because you can only use a self-signing certificate with a document that contains an interactive signature field, you cannot create such a document with PDFpen. For that, you need PDFpenPro.

To create a signed document with PDFpenPro, add an interactive signature field to the document (see [Make an Interactive Signature](#)), sign the document, and then apply the certificate. Remember, however, that once you apply the certificate, the document is locked.

Use the DocuSign Service (Pro Feature)

If the whole business of obtaining and using a signing certificate (see [Apply a Signing Certificate](#)) seems more work and trouble than you like, don't worry: with PDFpenPro you can easily use the [DocuSign service](#) to handle the gnarly details for you. The service is integrated into PDFpenPro, making it easy for you to use the service to upload and distribute PDFs securely to business associates, colleagues, clients, or anyone else from whom you want to obtain a trusted digital signature.

To start, you first need to obtain an account with DocuSign, but that's easy enough: choose File > DocuSign > Log In to DocuSign.

PDFpenPro opens your web browser and takes you to the DocuSign login page, on which you can create a new account.

To create an account you need to supply a name, a company name, an email address (important: this is the address DocuSign uses to send you signed copies of your PDFs), a password, and some other information. Although DocuSign accounts are not free, you can try out the service for 30 days at no cost: in fact, the new account creation process doesn't even ask for a credit card number or other method of payment.

Important Tip: Record the email address and password you supply to DocuSign just in case you need to enter that information again in the future—although PDFpenPro saves your login credentials and supplies them when you use the service, better safe than sorry.

Once you have an account, it shows up on the File > DocuSign menu in PDFpenPro (**Figure 67**).

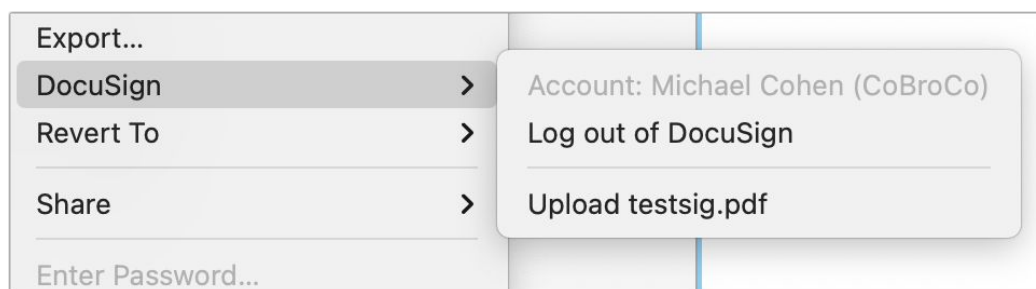


Figure 67: PDFpenPro knows your DocuSign account credentials and shows you the account to which you are logged in.

After you are logged in, sending a PDF to DocuSign is as simple as choosing Upload from the File > DocuSign menu. PDFpenPro uploads the PDF currently open in your PDFpenPro window.

A few pointers and notes:

- You can send *any* PDF to DocuSign; it does not have to be a form, nor does it have to have any signature lines in it. You specify where recipients sign on the uploaded PDF, using the tools provided on DocuSign webpage.
- You can send a PDF to several recipients if you need signatures from each of them: you provide the email addresses and DocuSign sends the PDF to those addresses with instructions on how to fill them out.
- DocuSign's online tools provide other form elements, such as a signing date item, that you can also add to an uploaded PDF.
- Form fields you create with PDFpenPro convert to DocuSign fields when you upload your PDF, giving you the ability to assign specific fields to specific users using DocuSign's online tools.
- The default values for PDFpenPro-created form fields pre-fill automatically when you upload a PDF.
- Keep your original PDFs. Although DocuSign returns the signed copies to you, you may want to edit a PDF and use it again at some other time—remember, digitally signed PDFs are not editable.

Tip: It is well worth your while to visit the [DocuSign Support](#) pages for the most current information about the various services DocuSign offers and how to use them.

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.
- Add a watermark to one or more pages.
- Add headers, footers, and page numbers to a PDF.
- Create links to other pages in the PDF or to webpages.


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 **AB** annotation 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  annotation 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 already enabled for imprints that you create by dragging. If you choose Edit > Wrap Text on such an imprint, you disable Wrap Text, 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

When you create a new text imprint, it 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. Click the Fill Color  icon.
3. On the menu, click the background color that you want. If the menu does not contain your desired color, click the Custom Color  icon at the bottom of the menu, and then use the Colors panel that appears to choose the color you want.

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

You can format a range of selected text in an imprint or 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.

Two Tips: See [The Text Format Tools](#) for a quick way to make common text format settings. 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 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 a bit more than 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 68**). Choose Format > Text > Show Ruler (⌘-Control-R) to see it.

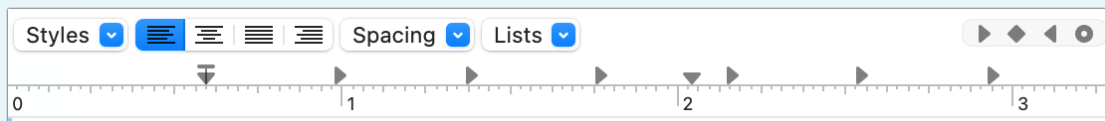


Figure 68: The ruler can set indents, tabs, alignment, and more.

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 (⌘-Control-C) and Format > Text > Paste Ruler (⌘-Control-V) commands.

Correct or Remove Items on a Page

It's easy enough to edit text imprints that you put on the page, but what about the native text or graphic objects that a PDF may already contain? PDFpen provides several tools and commands that give you some mastery over a PDF's native objects.

Use the Correct Text Command

The Correct Text command gives you the ability to modify the contents of a PDF's native text objects. Here's how to use it:

1. With the Select Text  tool, select the text you want to change.
2. On the 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 69**).

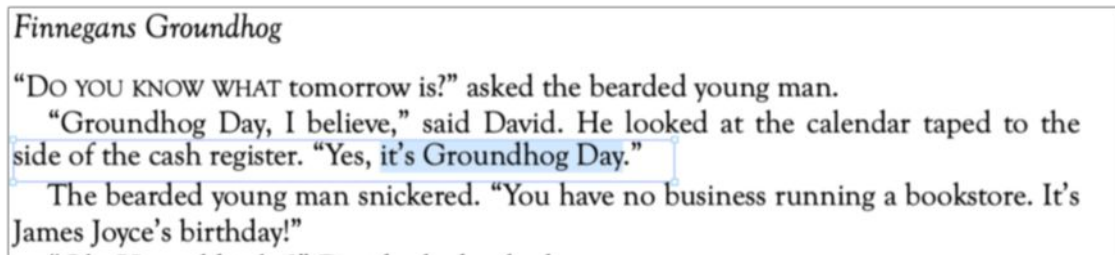


Figure 69: PDFpen puts your selection and surrounding text into an imprint when you use the Correct Text command.

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 70**). You may have to work hard to make the imprint come close to matching the original's appearance.

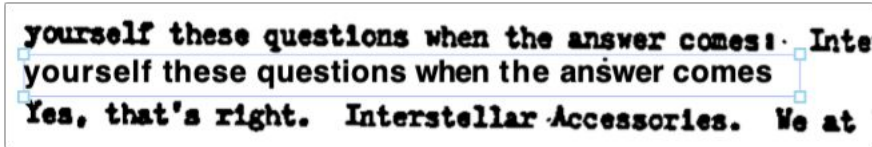



Figure 70: This text imprint was derived from an OCR analysis of a low-resolution JPEG image that was scanned from a decades-old typed letter. Note the default font, Helvetica 12, was used in the imprint, and that the imprint does not quite align with the underlying text image, which was scanned at a 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 [The Text Format Tools](#) and [Change the Appearance of Text](#)).

Tip: Don't try to correct huge amounts of text at once. The best use of the Correct Text command 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, using the Select Text  tool, click a word that you want to correct, or drag to select several words to correct. A Correct OCR Text panel appears (**Figure 71**).

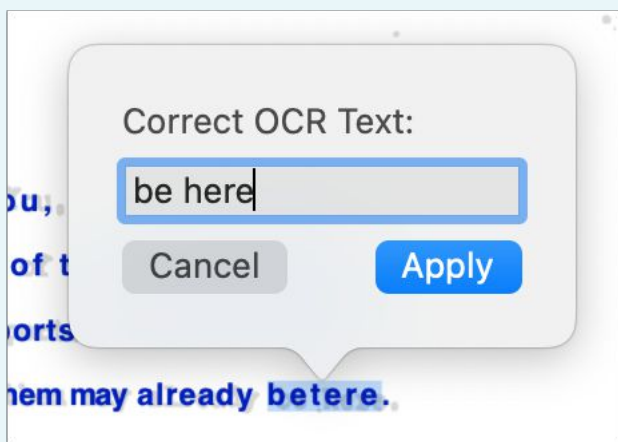



Figure 71: Use this panel to correct text in the OCR layer.

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.

Redact Text

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 72**). In the case of scanned text, it also deletes the part of the image from which the scan was derived.

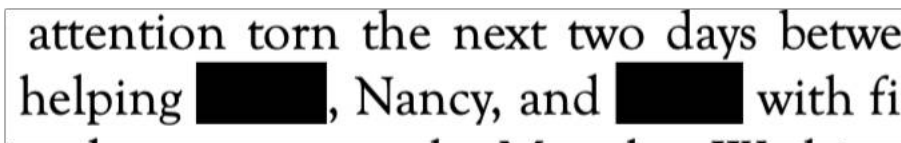


Figure 72: Two names in this manuscript have been redacted to protect the innocent.

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. On the other hand, you can easily edit text in a text imprint manually to remove sensitive information.

Fine-Tune with the Precision Edit Tool

As you learned in [The Selection Tools](#), to the right of the Edit  tool on the Editing bar you have a Precision Edit  tool. With this tool you can

select and then move, scale, or remove native PDF text and graphic objects.

Here's how to use it:

1. On the Editing Bar, click the Precision Edit  tool; your pointer changes to the precision  pointer.
2. Click the item you want to manipulate, either text or graphic. This selects the item, indicated by a bounding box with control handles  at its corners (**Figure 73**).

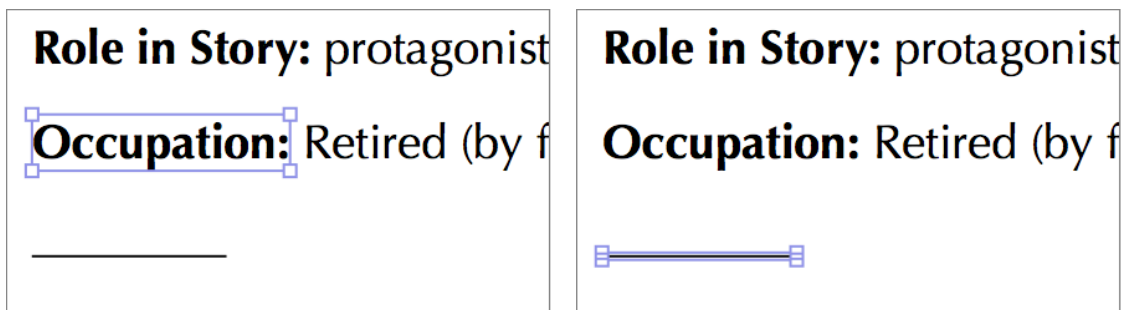





Figure 73: The Precision Edit tool can select either native text objects (left) or graphic objects (right).

3. Do any of the following:
 - ▶ Place your pointer over the object so your pointer becomes a move  pointer, then drag to move the object.
 - ▶ Place your pointer over one of the object's control handles so your pointer becomes a resize  pointer, and then drag to scale the object.
 - ▶ Press Delete to remove the object from the PDF.

Note: The Precision Edit tool does not select imprints or objects you have drawn using PDFpen's drawing tools; use the regular Edit  tool for those. (See [A Peek at What Is Inside](#) for more about the native text and graphic objects that the Precision Edit tool can select.)

Search and Replace or Redact Text

In addition to the correction capabilities described in [Correct or Remove Items on a Page](#), above, there's yet another avenue to modifying a PDF's native contents: the Find feature.

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 (⌘-Option-F).

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

2. Enter some text in the Find field. As you type, matching results appear in the window (**Figure 74**).

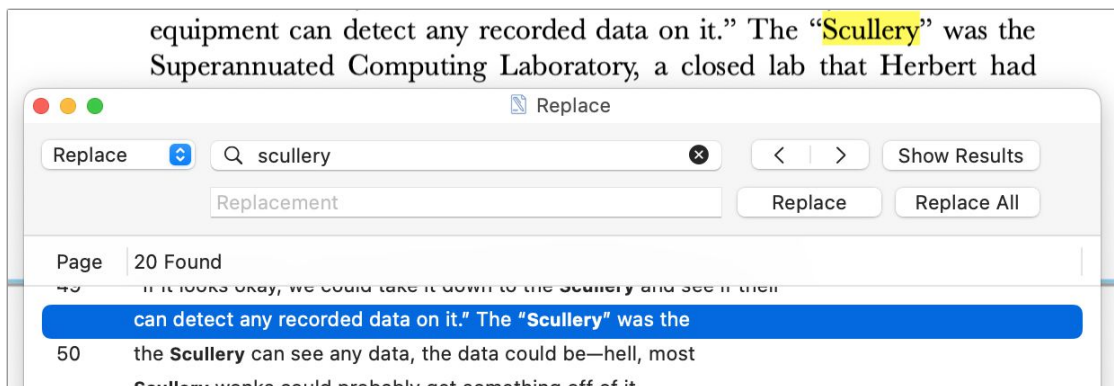


Figure 74: Use the window to perform Find and Replace operations.

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 [Use the Correct Text Command](#)). It even works with OCR text in a scanned image.

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 (⌘-Shift-F).

The Redact window shows its Find field and includes a menu with redaction options (**Figure 75**).

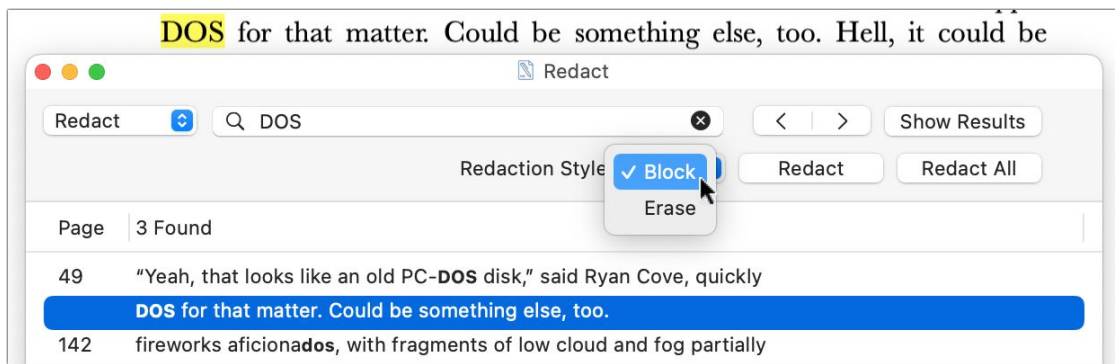




Figure 75: The Redaction Style menu gives you the option of blocking out or erasing search results.

2. In the Find field, enter text that you’d like to redact.
PDFpen displays any matches in the lower portion of the window.
3. From the Redaction Style pop-up menu, choose a redaction style. You have the same two choices as for manual redactions: Erase or Block (described in [Redact Text](#), a few pages earlier).
4. Do one of the following:
 - ▶ Next to the Redaction Style pop-up menu, click Redact 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 Information” in [The Inspector](#).)

Insert Line Numbers

In some documents, such as transcripts or legal documents, you may find it useful to number some lines of text for reference. You can select text with the Select Text  tool or select a rectangular area containing text with the Select Rectangle  tool and then choose Edit > Insert Line Numbers. PDFpen places numbers to the left of the selected text.

Inserted line numbers have the following properties:

- Inserted line numbers always begin with 1.
- They use the default page number font as specified in PDFpen > Preferences > Editing.
- Once added, they cannot be edited; to remove them, choose Arrange > Unlock All (⌘-Shift-L), click them with the Edit  tool, and then either choose Edit > Delete or press Delete.

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 Thumbnails 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. Choose File > Insert (⌘-Shift-I). The standard Open dialog appears.
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 containing 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 it 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 76**). A cropping rectangle is superimposed on the image.

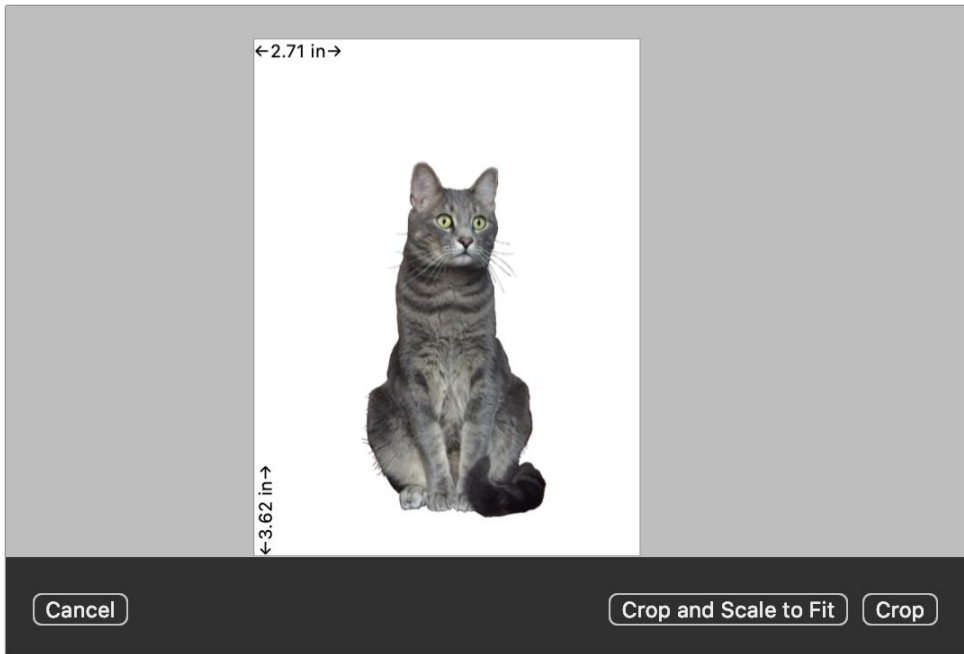


Figure 76: This image is on the verge of being cropped.

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:

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 77**).

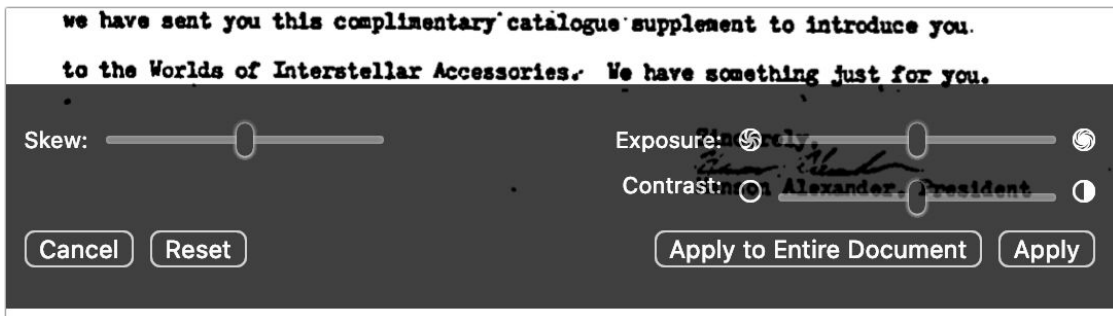



Figure 77: The Deskew and Adjust controls can affect the selected image or all of the images in the document.

2. Drag the Skew slider left or right to adjust the tilt of the image so 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 to open the Image Edit panel, which appears with its Adjust tab selected (see **Figure 78**).

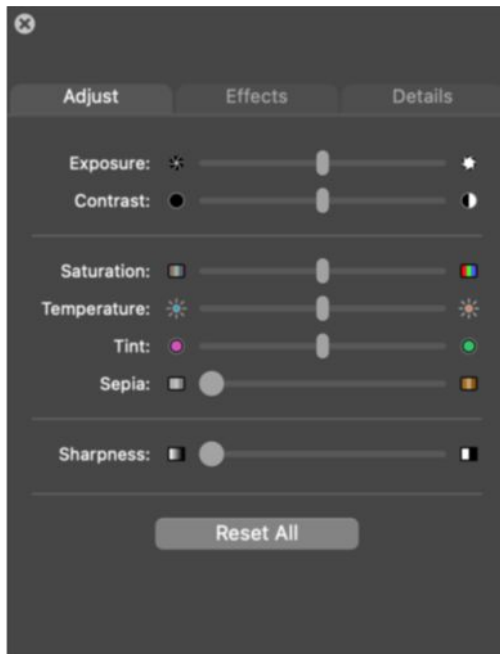


Figure 78: The Image Edit panel provides controls similar to those found in Photos and many other image-editing applications.


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 on 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 79**).

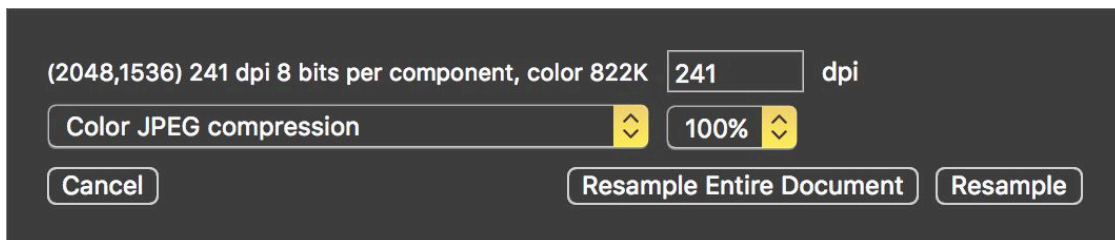


Figure 79: Reduce the resolution and color depth of an image with the Resample controls.

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.

Compression and Image Adjustments


PDFpen and PDFpenPro, starting with version 12 incorporate new compression technologies that produce smaller PDFs and all the PDFs you make with PDFpen benefit from these technologies automatically. But what about existing PDFs?

With PDFpen and PDFpenPro, when you use the Edit > Deskew and Adjust Image command on an image, or when you use the Edit > Resample Image command, the new compression technologies are applied. In most cases, you'll end up with a smaller PDF as a result.

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 appears, click the eyedropper on the color you want to knock out (**Figure 80**), and then slide the Tolerance slider until the image shows the desired transparency (**Figure 81**).

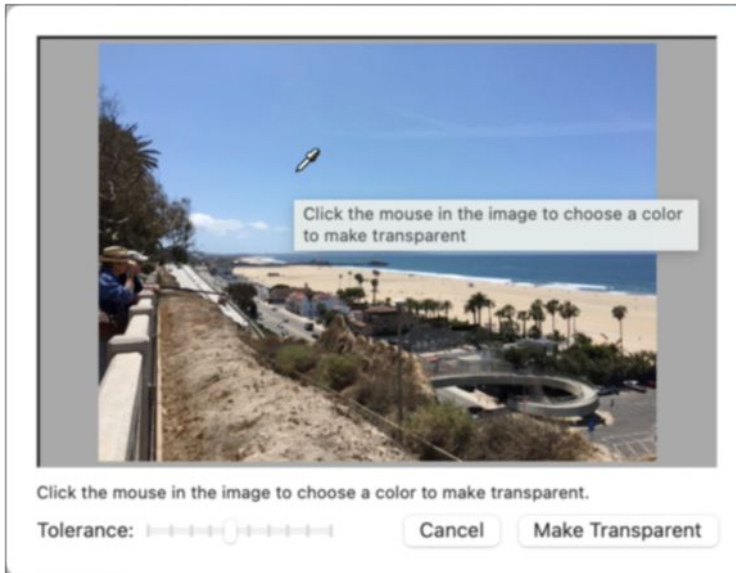


Figure 80: This image is about to have the sky knocked out.



Figure 81: Excuse me while I lose the sky...

3. Click Make Transparent.

Colors that fall within the range you specified disappear, and anything on the page 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 on the Editing Bar—if the window is wide enough to display them.

Add a Watermark

You may have some documents that are not in final form or are confidential and need to have their pages marked accordingly, and others that need to display some sort of corporate or organization brand. PDFpen gives you watermarks to satisfy that need. Watermarks are non-editable images that appear behind the other elements on a page, such as the stamp shown in **Figure 82**.



Figure 82: This page of a novel-in-progress has a purple watermark swimming under the text.

You can turn either a text imprint or an image into a watermark, and the watermark can appear on all of a PDF's pages, or a range of pages, or just a selected page.

To create a watermark, do the following:

1. Go to any page where a watermark should appear.
2. Place an image, draw something with PDFpen's drawing tools, or create a text imprint on that page.
3. Scale and format the item so it is the right size, but don't worry about orienting it.
4. Select the item you placed if it is not already selected, and then choose Edit > Watermark > Convert to Watermark. The Convert to Watermark dialog appears (**Figure 83**).

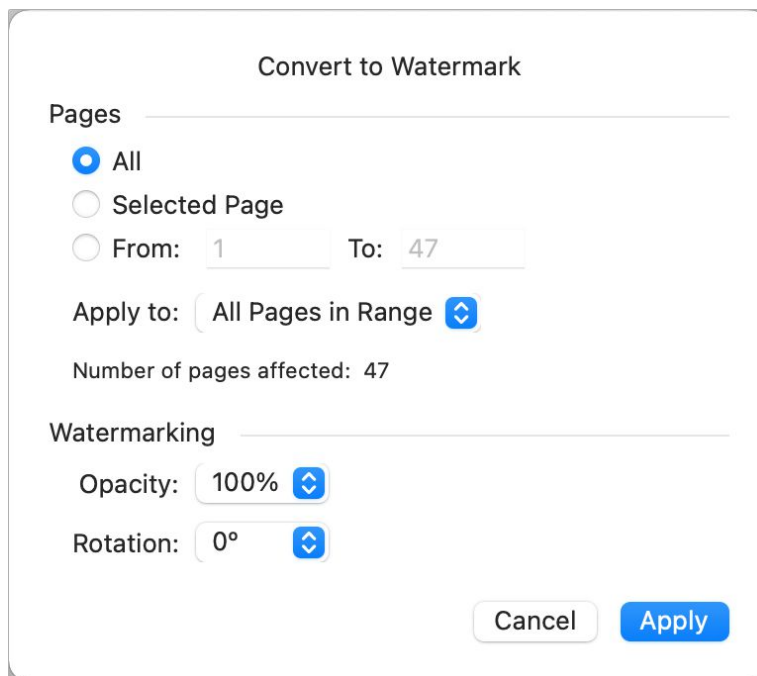


Figure 83: This dialog turns the item you placed on a page into a watermark.

5. In the dialog, specify the pages on which you want the watermark to appear.
6. Optionally, use the “Apply to” pop-up menu to put the watermark on every page in the range, or only on odd or even pages.

7. Use the Opacity and the Rotation pop-up menus to choose the watermark's opacity and the angle at which the selected item should be rotated when it is converted.
8. Click Apply. The watermark appears on the pages you specified.

You can remove a watermark from any page or range of pages:

1. Select the thumbnails of the pages from which you want to remove the watermark in the sidebar (see [Navigate with the Sidebar](#))
2. Choose Edit > Watermark > Remove Watermark from Selected Pages.

Note: Although adding watermarks is relatively speedy process, even over hundreds of pages, removing watermarks from many dozens of pages at once can take a lot of time—sometimes many minutes. Be patient.

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 those tasks.

Rearrange Pages

The Thumbnails sidebar and your preferred pointing device are the tools you need to rearrange pages in a PDF:

1. Choose View > Thumbnails to show the Thumbnails 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, were you to drop the dragged thumbnail at that moment, that 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 Thumbnails sidebar to see more thumbnails at once, which is helpful when you need to do a lot of rearranging.

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

1. In the Thumbnails sidebar, Shift-click or ⌘-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 Thumbnails sidebar (**Figure 84**).

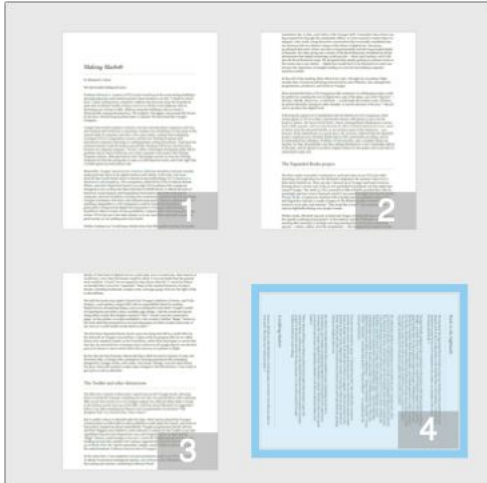


Figure 84: One of these thumbnails is not like the others.

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


Note: If you select multiple page thumbnails, PDFpen applies the Rotate command to all of them.

Tip: If your document has pages where the text is rotated so that it's vertical, and you need to edit that text, temporarily rotate the page to make the text horizontal before you edit. Although you can select and correct vertically oriented text on a 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 want to crop.
2. On 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 85**).

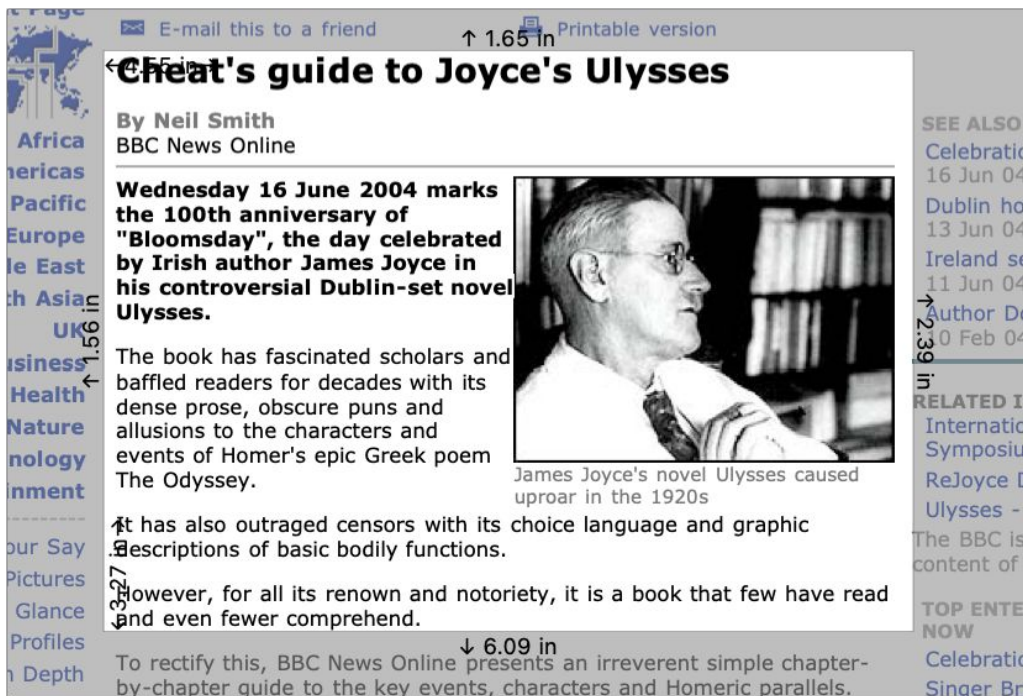


Figure 85: This page is getting a much-needed trim.

Tip: You can change the units used to display dimensions—say, from typographer’s points to inches—in PDFpen > Preferences > Editing.

4. Choose Edit > Crop Page to Selection.

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.

Add Headers, Footers, and 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, headers, or footers (or all three) on its pages. PDFpen has a command for that: Edit > Headers, Footers, Page Numbers > Insert. This command opens the dialog shown in **Figure 86**.

The dialog box is titled 'Insert' and contains the following settings:

- Position:** Header (dropdown menu)
- ☒ **Page Numbering**
- Alignment:** Inside (dropdown menu)
- Format:** 1,2,3 (dropdown menu)
- Starting Page:** 1 (text field with up/down arrows)
- ☒ **Include number on first page**
- Header Text:**
 - Outside Text:** (text field)
 - Center:** (text field)
 - Right:** (text field)
 - Font:** Helvetica 12.00 (text field) with a **Select...** button
- Advanced Options:**
 - Template:** Page &[Page] of &[Pages] (dropdown menu) with buttons for # and ##
 - Insert from page:** 1 (text field) **To page:** 47 (text field with up/down arrows)
 - Margin Positioning:**
 - Left:** 36 (text field with up/down arrows)
 - Right:** 36 (text field with up/down arrows)
 - Vertical:** 0 (text field with up/down arrows)

At the bottom right are **Cancel** and **Insert** buttons.

Figure 86: This dialog configures how PDFpen puts headers, footers, and numbers on pages. Use the Advanced Options to specify the range of pages to be affected and whether to include a page total.

The dialog is divided into four parts. The function of each part is as follows:

- **Position:** Use this two-item pop-up menu to specify whether the element you are inserting goes at the top (Header) or bottom (Footer) of each page.
- **Page Numbering:** This checkbox and its related settings let you specify whether PDFpen inserts a page number, where on the page top or bottom the page number appears, and the format of the number.
- **Header/Footer Text:** You use this group of settings to specify the content of header or footer text, the typeface and size in which it appears, and where at the top or bottom of the page the text appears.
- **Advanced Options:** Use this to create a more complex page number layout and more completely control the pages on which the inserted material appears. I explain these options in more detail below.

Keep in mind that you can use this command several times for a given PDF, and there are times when you will want to do so: once to specify page header text, once to specify page footer text, and once again to specify the page numbering.

Here are explanations of some of the less obvious items in the Page Numbering section of dialog:

- **Inside, Outside:** These options appear on the Alignment pop-up menu and are useful when the PDF will be printed double-sided 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 setting to see what it does; 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.

Following the Page Numbering section is where you specify page header or footer text. Whether you insert a header or footer depends on your choice in the Position pop-up menu. You can specify as many as three different texts to appear in a header or footer: one at the center of the header/footer area of the page, one at the left side of the area, and one at the right side.

The text positions you can specify for the header or footer texts change, however, when you choose to insert a page number and also choose either Inside or Outside from the Alignment pop-up. In either case you can add center text, but you can then specify only one other text item: either at the inside edge of the page (if you have chosen Outside for the page number location) or at the outside edge (if you have chosen Inside for the page number location).

The Advanced Options (shown in **Figure 86**, a page or so back) give you additional control over where and how the headers, footers, and page numbers appear:


- **Template:** Use this option to add text to the page numbers and to show the total number of pages, such as “Page 3 of 70”. This option is dimmed if you have not chosen to insert page numbers. You can choose one of the supplied numbering templates as-is from the pop-up, modify one of the templates, or make your own from scratch.

Click # to insert `&[Page]` in the template, which resolves to the current page number; click ## to insert `&[Pages]`, which resolves to the total number of pages in the PDF. You can also add your own text. For example, `Page &[Page] of &[Pages] wonderful pages` produces a page number like “Page 3 of 70 wonderful pages”.

- **Insert from Page/To Page:** Enter the page number in the Insert from Page field on which you want your headers, footers, or page numbering to start, and enter the page number on which you want them to end in the To Page field.
- **Margin Positioning:** Use these advanced settings to specify how far from the left and right edges of the page to place headers and footers. The Vertical setting controls how far from the top or bottom edge of the page headers and footers appear. The measurement units are in points.

Note: When you use the default Vertical setting of 0 for Margin Positioning, you can see the PDF’s headers and footers on screen; however, it may be beyond the capability of some printers to print content that close to the edge of the page.

When you click Insert, PDFpen creates native text objects containing the texts and numbers you have specified on each page of the PDF starting from the page specified in the Insert from Page field in the Advanced Options and ending on the page entered in the To Page field; by default, all the pages in the PDF are included unless you specify otherwise.

Tip: Because the command inserts native text objects, you can use the Precision Edit  tool to remove these times from individual pages, such as pages between chapters in a book that you want to appear completely blank.

PDFpen remembers whether you have inserted headers, footers, and page numbers and where you have placed them, so if you choose the command again and make different settings in the dialog, any previ-

ously placed headers, footers, or page numbers that conflict with your new settings are removed before the new items are placed in the PDF.

You can also manually remove any headers, footers, or page numbers you have previously placed: use the Edit > Headers, Footers, Page Numbers > Remove Page Header (or Page Footer) command to strip them from your PDF.

Note: The native text objects inserted by the Edit > Headers, Footers, Page Numbers > Insert command are not dynamic: they won't automatically update if you later change the PDF's pagination.


Multiple Sections and Header/Footer Tip


Sometimes a long document might have sections, each requiring custom page numbering, headers, and footers. Although PDFpen's Headers, Footers, Page Numbers dialog doesn't provide functionality for handling such documents, 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 Edit > Headers, Footers, Page Numbers > Insert 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 webpage that has useful information; for yourself you might want to link to another PDF document on your Mac. 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 page and URL links that appear within it.





Unlike HTML links, which are attached to text or objects on a webpage, the links you create in PDFpen 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 is a tool for creating links: the Link  annotation 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 on 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 the current PDF, do the following:

1. Choose Tools > Link (-9), or choose the Link  annotation tool from the toolbar's Annotation  tools pop-up menu.
2. With the Link  annotation 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 (**Figure 87**), click Page, enter a page number in the Page Number field, and then click OK.

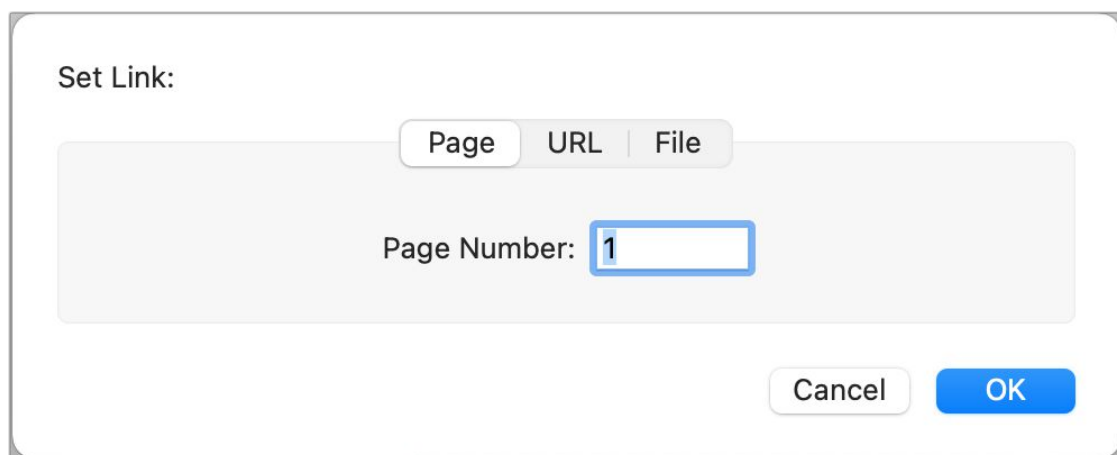


Figure 87: With this handy dialog you can set Page, URL, or File links.




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 webpage pointed to by the link.

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

1. Choose Tools > Link (⌘-9), or choose the Link  annotation tool from the toolbar's Annotation  tools pop-up menu.
2. With the Link  annotation 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, click URL at the top of the dialog, enter a web address in the URL field that appears, and then click OK. (Partial URLs do not work. For example, if you enter smilesoftware.com in the Set Link dialog, the URL link does nothing when clicked. However, <https://smilesoftware.com> does open your browser and load the page at that address.)

The process of creating a link to a PDF file on your Mac is quite similar to those for creating Page or URL links; in fact, first two steps are identical: choose the Link  annotation tool and then drag out a rectangle where you want the link to go. Only the last part of the process is different:


1. In the Set Link dialog, click File.

2. Click the Browse button, and then, in the file dialog that appears, navigate to the PDF file you want the link to open and click Select.
3. Optionally, in the dialog's Page Number field, specify the page on which you want the linked PDF to open; page 1 is the default.
4. Click OK.


Note: A link to another PDF is specified in relation to the location on your Mac of the PDF you are currently editing. If you subsequently move either of these documents, the link will cease working.

How to Edit Links

All three kinds of links use the same Set Link dialog. You can change a link object from one kind to the other by clicking Page, URL, or File in the segmented button near the top of the dialog.

To change the link destination of a link object, double-click it with the Edit  tool and enter a new location in the Set Link dialog.

Make Links Automatically (Pro Feature)

If you have a PDF document that has URLs in its text (such as [take-controlbooks.com](#) or [support@example.com](#)), you can choose Edit > Create Links from URLs to place link objects over them. To edit a link object, double-click it with the Edit  tool.

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.

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](#).

I’ve made a form that demonstrates each form element available in PDFpenPro (**Figure 88**). 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.

Wizard Tim.com User Survey

User Name: Arthur, King of the Britons

Quest: To seek the Holy Grail ▼

Favorite Color: ☐ Red ☐ Green ☒ Blue

Knights:

| | |
|-------------------------------------|----------------------|
| <input type="checkbox"/> | Brave Sir Robin |
| <input checked="" type="checkbox"/> | Sir Galahad |
| <input checked="" type="checkbox"/> | Sir Fête of Pleasure |


Supplies:

| |
|-----------------|
| Coconut |
| Sword |
| Swallow |
| European swa... |

Sign Here

Tell the Wizard

Figure 88: 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.


You access the tools that create specific form elements from the Form  tools pop-up menu (described in [The Form Tools \(Pro Feature\)](#)). 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.

One Form per PDF

Unlike webpages, 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  form tool.

Once you have the field in place, you set its properties in the Form Element Properties tab of the Inspector (**Figure 89**).

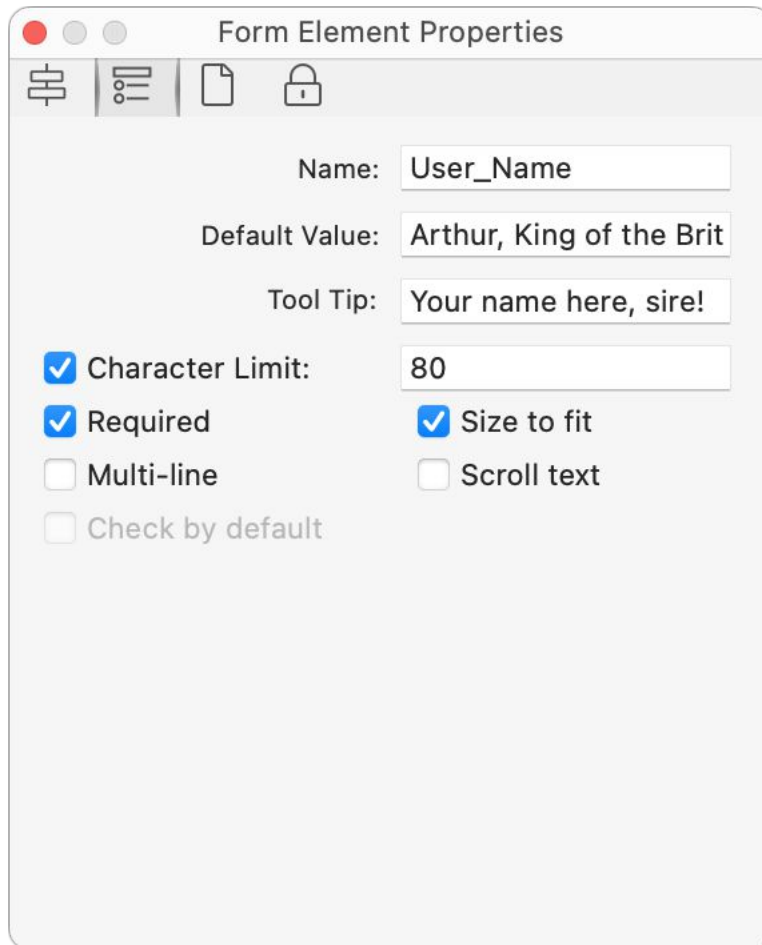




Figure 89: The Inspector shows the properties of a text form field.

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 in it. 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.

- **Tool Tip:** Text entered into this property appears as a tool tip when the user's pointer hovers over the form element; in addition, screen-reading assistive tools, such as VoiceOver, speak tool tips. Use this property to add a short description of the text element's purpose.
- **Character Limit:** You can enable this 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 past the field's borders.

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

Tip: Should you create a text field with specific customizations that you want to reuse, you can add that text field to [The Library](#) and drag out a copy any time you want to use it.

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 88**, 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 90 shows the properties associated with the choice element.

Form Element Properties

Name:

Default Value:

Tool Tip:

☐ Character Limit:

☐ Required ☐ Size to fit

☐ Custom Text ☐ Scroll text

☐ Check by default

| Name | Value |
|-----------------------|-----------|
| To seek the Holy... | grail |
| To storm the Castl... | castle |
| To fetch a shrubb... | shrubbery |

Figure 90: 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.
- **Tool Tip:** This text appears when the user's pointer hovers over the element, and is read aloud by screen-reading assistive software such as VoiceOver.
- **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 90**, 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 a 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 88**, 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 Checkbox ☒ form tool to create both a default-size checkbox and a label (a text imprint) for it. Or, you can instead drag with the Checkbox ☒ form tool to create a checkbox that has a custom size. To edit the label text, use the Select Text  tool.

The properties of a checkbox element from the Wizard's survey are shown in **Figure 91**.

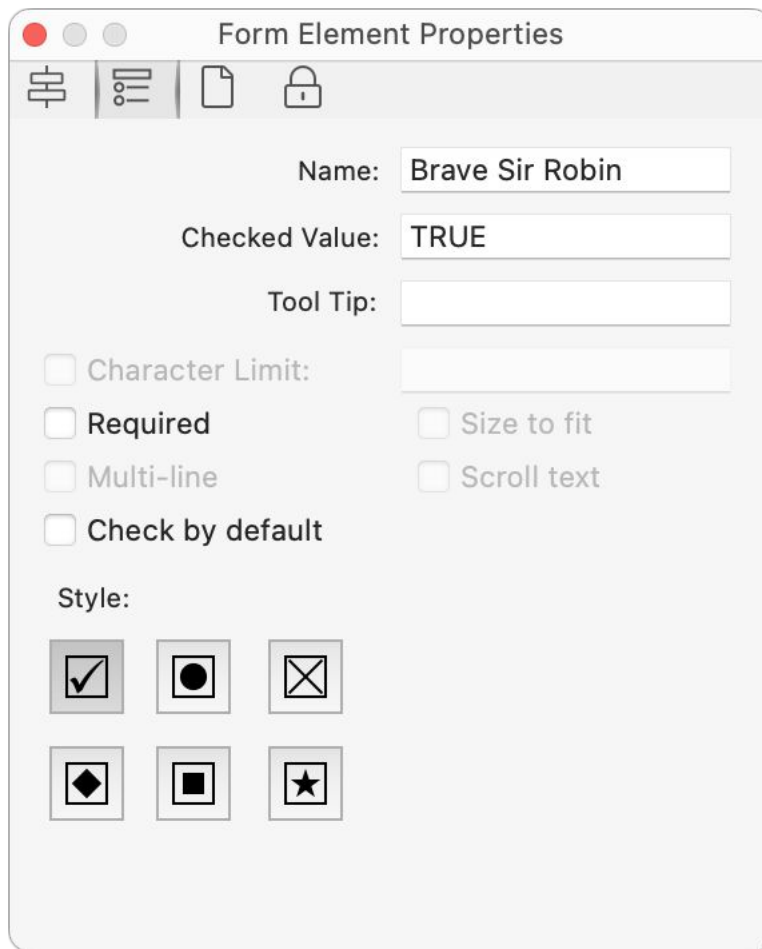


Figure 91: Checkboxes return a value only when checked.


You can customize the following checkbox properties:


- **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.
- **Tool Tip:** This field can contain a brief description of the checkbox's purpose that appears when the user's pointer hovers over the element, and is read aloud by screen-reading assistive software such as VoiceOver.

- **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.
- **Style:** Your choice here determines what mark appears when the checkbox is selected. It is a good practice to use the same style for all the checkboxes in a group.

Offer Radio Button Choices

In Wizard Tim's survey (**Figure 88**, 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  form 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  annotation 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 92**).

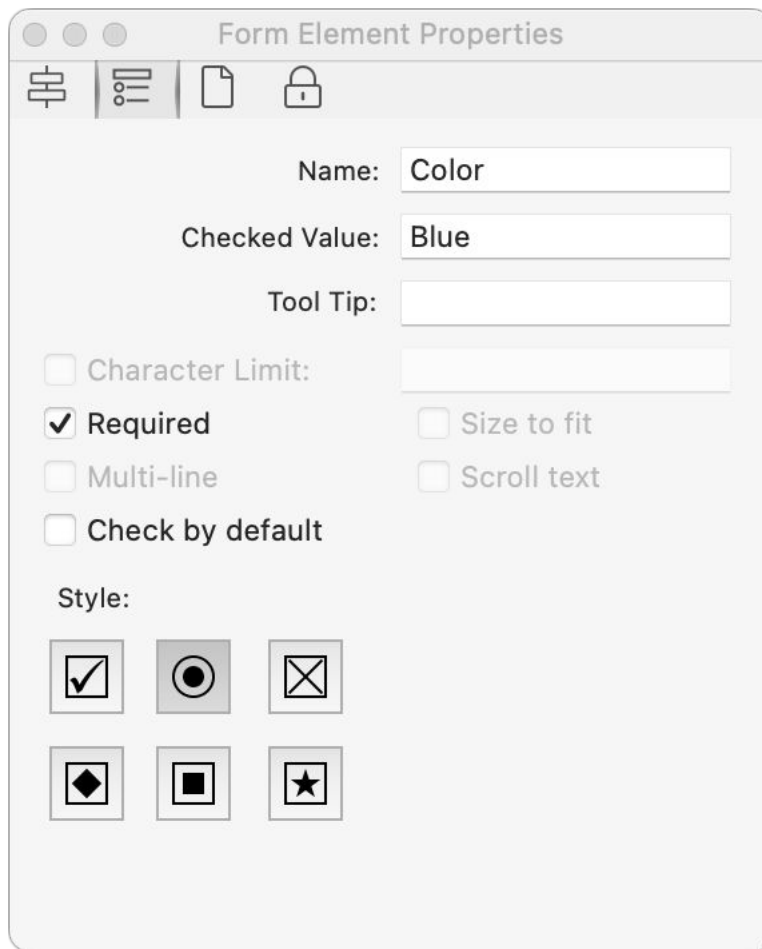


Figure 92: All radio buttons in a group share the same Name property but have different Checked Value properties.

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 must have the same Name property, they should each have a *different* Checked Value property.
- **Tool Tip:** Use this to add a brief description of the radio button that appears when the user's pointer hovers over the element; it can also be read aloud by screen-reading assistive software such as VoiceOver.

- **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.
- **Style:** Click a style to set the radio button element's appearance. In most cases, the default appearance is best, but if you choose another style, make sure that all the radio buttons in the group use the same style.

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 88**).

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 ⌘-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  form 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. **Figure 93** shows the list element's properties from the Wizard Tim's survey.

Form Element Properties

Name:

Checked Value:

Tool Tip:

☐ Character Limit:

☐ Required ☐ Size to fit

☒ Select Multiple ☐ Scroll text

☐ Check by default

| Name | Value |
|------------------|------------|
| Coconut | Coconut |
| Sword | Sword |
| Swallow | Swallow |
| European swallow | EuroSwallo |

Figure 93: List element properties resemble choice element properties, but you can select more than one choice.

You can set the following properties for a list element:

- **Name:** Each list element requires a unique name.
- **Tool Tip:** Give a brief description of the list's purpose that users can see when hovering their pointers over the element, or can be read aloud by screen-reading assistive software such as VoiceOver.
- **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 (see [Offer a Single Choice](#)). 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 as the value.

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 94**. This form element also provides users with the capability of applying a digital signing certificate; see [Apply a Signing Certificate](#).

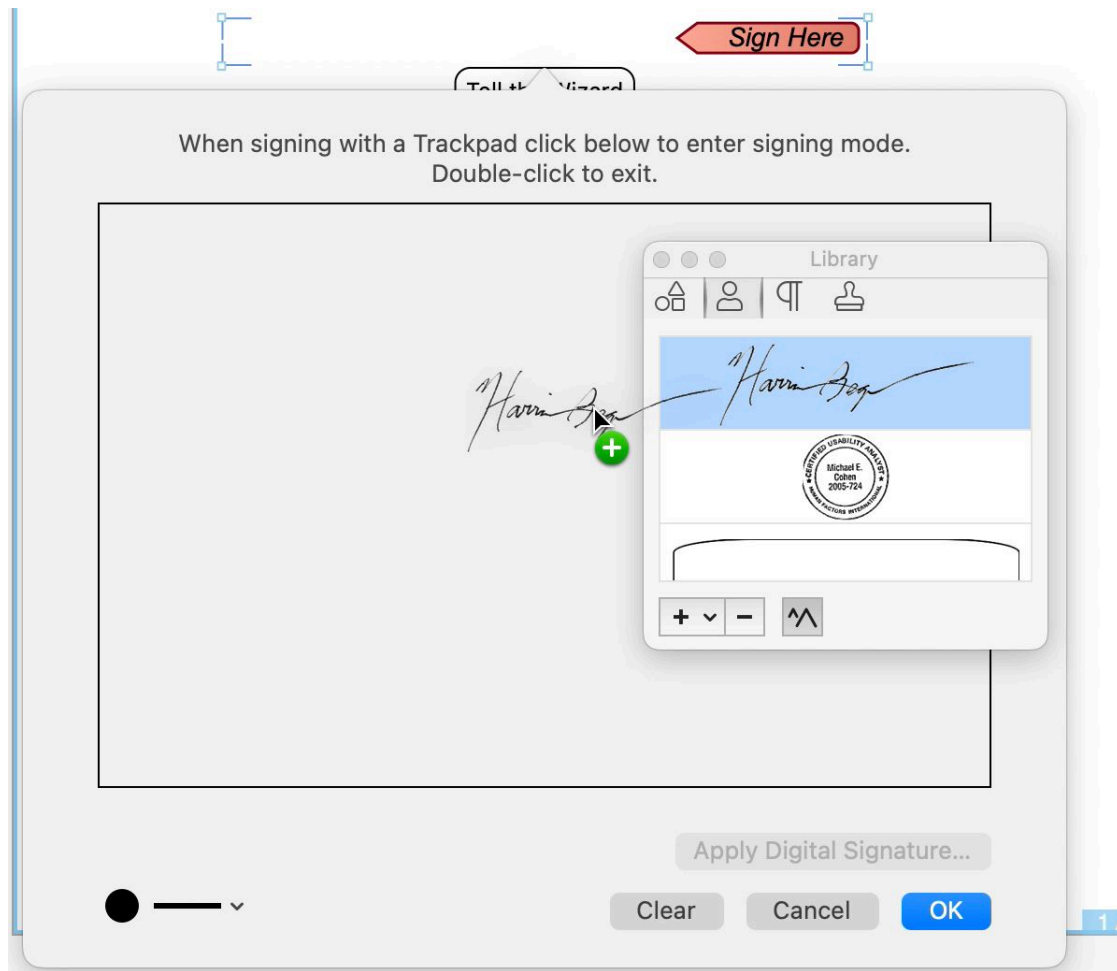




Figure 94: Sign an interactive signature field with your finger, or drag a graphic into the field's dialog.


To create an interactive signature field, drag out a rectangular area on the form with the Signature  form 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 Signature color and stroke  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 88**) 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 Button  form 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 95**). 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 95: 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 [ISO](#), which currently 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 96**).

Form Element Properties

Name:

Checked Value:

Tool Tip:

☐ Character Limit:

☐ Required ☐ Size to fit

☐ Multi-line ☐ Scroll text

☐ Check by default

Label:

Figure 96: 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.
- **Tool Tip:** Supply text that explains what the button does; the text appears when the user hovers the pointer over the button, and is read aloud by screen-reading assistive software such as VoiceOver.
- **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 website](#). 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 97**, 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.

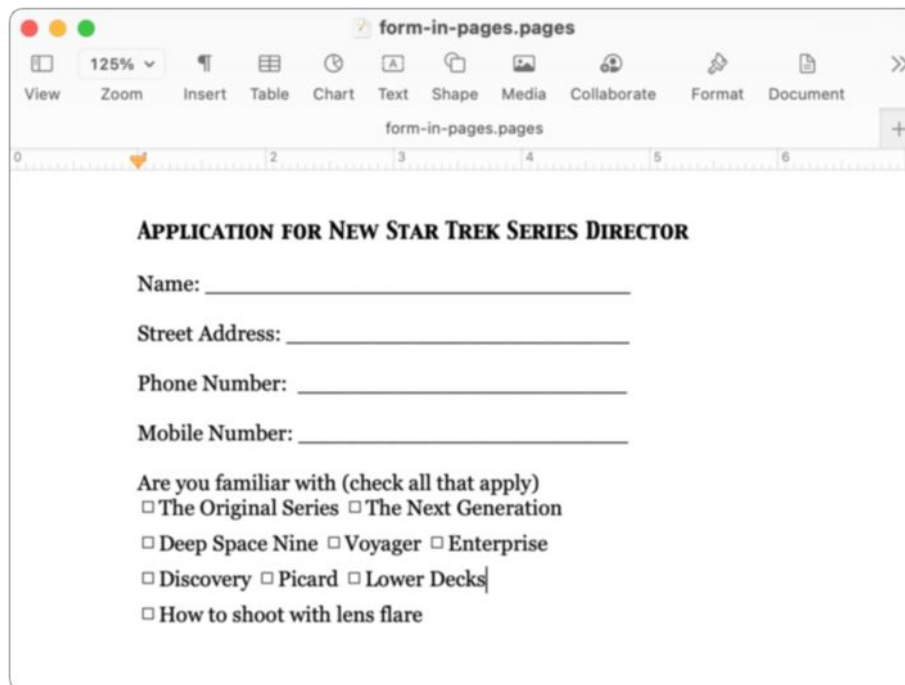
The image shows a screenshot of a word processing application window titled "form-in-pages.pages". The window has a menu bar with options: View, Zoom (125%), Insert, Table, Chart, Text, Shape, Media, Collaborate, Format, and Document. Below the menu bar is a toolbar with icons for various functions. The main content area displays a form titled "APPLICATION FOR NEW STAR TREK SERIES 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 a list of checkboxes and their corresponding labels: "The Original Series", "The Next Generation", "Deep Space Nine", "Voyager", "Enterprise", "Discovery", "Picard", "Lower Decks", and "How to shoot with lens flare". The form is presented in a clean, professional layout with a light gray background.

Figure 97: To use the Create Form Fields command, you can start with a form created in a word processor (in this case, Apple's Pages) and save it 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 98 shows the result of running the Create Form Fields for Page command on the PDF created from the document in **Figure 97**.

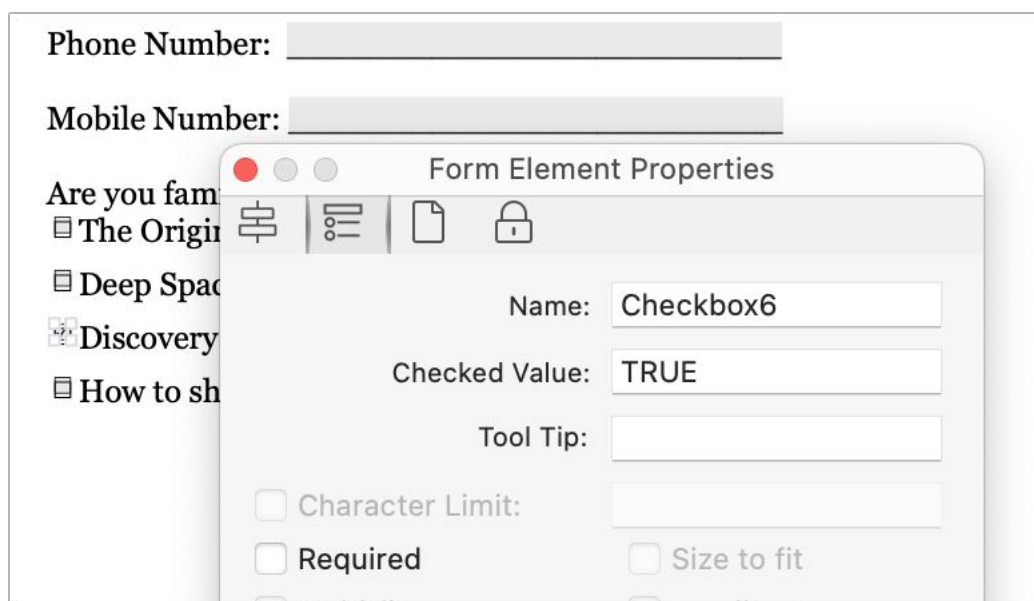


Figure 98: This is a portion of the “automagically” created form, along with the Inspector showing one element’s details.

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.

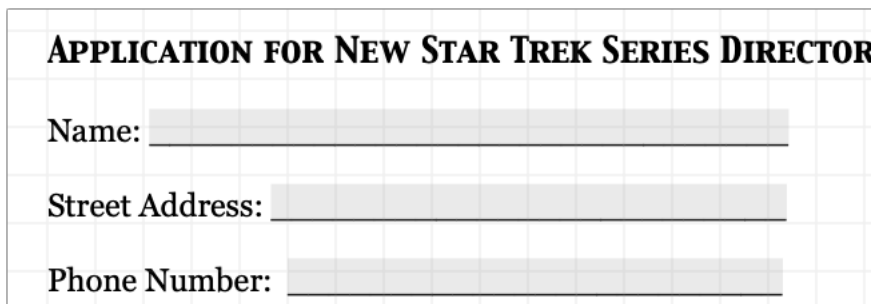
Tip: You can mix things up, too: begin by using a word processor to give you a running start when creating a form, generate the initial form elements automatically with PDFpenPro, and then add any additional form elements you need with the PDFpenPro form tools.

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 99**).



APPLICATION FOR NEW STAR TREK SERIES DIRECTOR

Name:

Street Address:

Phone Number:

Figure 99: 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.

Use Guides

By default, PDFpen and PDFpenPro automatically present you with visible guidelines to help you align objects (**Figure 100**).

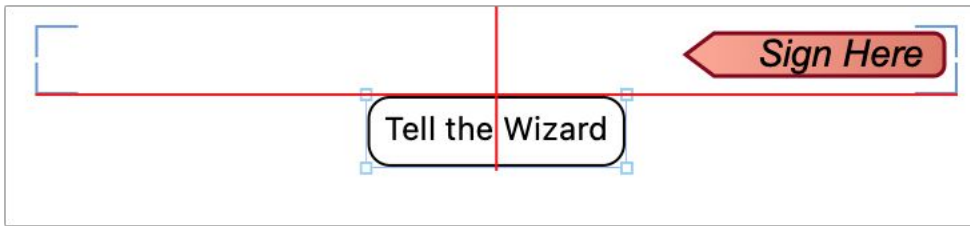


Figure 100: Guidelines appear when the button object is dragged near the center and bottom of the signature field above it.

How the guides appear depends on the type of object:

- **Text objects:** As you drag a text object, it displays guidelines that align the baseline of the object's text with the baseline of other text on the page.
- **Other objects:** When you drag a non-text object, guidelines appear that help you align the center or edges of the object with the centers or edges of other objects on the page.

You can choose **Arrange > Snap to Guides** to have a dragged object snap to a guideline as it appears.

Tip: When Snap to Guides is turned on, hold down Command as you drag to temporarily disable the snapping action.

Should you find the guides distracting, you can turn their automatic appearance off: go to **PDFpen > Preferences > Editing** and uncheck **Show Guides**.


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 101**) so you can see the order in which you can tab through them.




The image shows a form with three elements. The first element is 'User Name: Arthur, King of the Britons' with a blue box containing the number '1'. The second element is 'Quest: To seek the Holy Grail' with a blue box containing the number '2'. The third element is 'Favorite Color: Red Green Blue' with three blue boxes containing the numbers '3', '4', and '5' respectively. The text 'Red', 'Green', and 'Blue' are colored red, green, and blue.

Figure 101: 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.

An even easier way to arrange your form elements is to use the sidebar. This method works best if you have given your form elements easily identifiable names.

To arrange form elements with the sidebar, choose View > Form Fields or choose Form Fields from the Sidebar  pop-up menu. The sidebar displays the form elements in your PDF in their current tab

order (**Figure 102**), and you can then drag them into the order you desire.



Figure 102: You can drag form fields into a different tab order with PDFpenPro's Form Fields sidebar.

Note: Changing a form object's position in the tab order does not change the object's position on the page.

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: by default, saving is 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 (⌘-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 (⌘-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 (⌘-Option-Shift-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 below. 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 (⌘-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](#)).

Furthermore, you can save optimized copies of PDFs to conserve space, as described next in [Save Optimized PDFs](#).

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 the pages in the PDF to image documents (see [Export as TIFF, JPEG, or PNG](#)).
- **Microsoft Word:** This export option converts your PDF into the 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.
- **Flattened PDF:** This option turns any text imprints, highlights, and drawn objects you have added into native PDF objects so that they are no longer editable as separate objects.

Users of PDFpenPro can export documents in these additional formats:

- **Microsoft Excel and Microsoft PowerPoint:** These two export options require a fully licensed copy of PDFpenPro and the PowerPoint export requires an Internet connection. 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; log in at this URL to enable the capability and to find out more: <https://www.evernote.com/Registration.action?code=pdfpen>.

Save Optimized PDFs

Way back in [A Peek at What Is Inside](#) we learned that PDFs can contain graphic images as well as text, and in [Use a Scanner to Make a PDF](#) we saw how to make scanned graphics into PDFs. However, pictures of text take up much more storage space than actual text, and, often, when we scan documents to make PDFs, we're more interested in using OCR to turn the scanned text in those documents into searchable, editable text (see [Use OCR on Scans and Graphic Files](#)) than we are in how pretty the scanned text looks on screen.

A case in point: I scan the receipts I get when shopping, and add searchable PDFs made from those scans to my checking account register. I like a high-quality scan because it produces better results when I perform OCR on a receipt, but once the OCR is done, that high-quality scan inside the PDF takes up a lot of storage space. It would be nice to get some of that space back.

And that's where the File > Create Optimized PDF command comes in. Choose it and PDFpen offers the dialog shown in **Figure 103**.

Optimize Images

Color:

☒ Resample to dpi if above dpi

Format: Quality:

Grayscale:

☒ Resample to dpi if above dpi

Format: Quality:

Monochrome:

☒ Resample to dpi if above dpi

Additional options

☒ Remove third-party metadata

☒ Optimize images only if it saves space

Figure 103: Your options when you choose to create an optimized PDF.

As you see, most of what this command does is resample image objects within a PDF to produce more compact versions. It deals with color, monochrome, and grayscale image objects separately (see [Resample an Image](#) for more information on the differences between these types of objects).

For each type of object, you can reduce the resolution to save space, which can produce a blurrier, if more compact, image. In addition, you can set these two options for grayscale and color images:

- **Format:** You can choose between Leave as is, Lossy (JPEG), and Lossless (ZIP). Lossy works upon bitmapped image objects that support various levels of quality, such as embedded JPEG images.

- **Quality:** For image objects that support quality settings, you can choose from six quality settings, from Highest to Lowest. The lower the setting, the less faithful each image object will be to the original but the more compact it will be. Note that choosing Lossless as the Format disables the Quality settings.

Note: Monochrome image objects, which include both 1-bit dithered images and 1-bit threshold images, have no Format nor Quality settings; only the resolution of those objects is affected by optimization.

When you run the command, you get a new, untitled PDF containing the newly optimized images—in most cases: if optimization doesn't save any space, and if you have checked “Optimize images only if it saves space,” no new PDF is produced. Otherwise, PDFpen tells you how successful the optimization was (**Figure 104**). The original PDF is left intact.

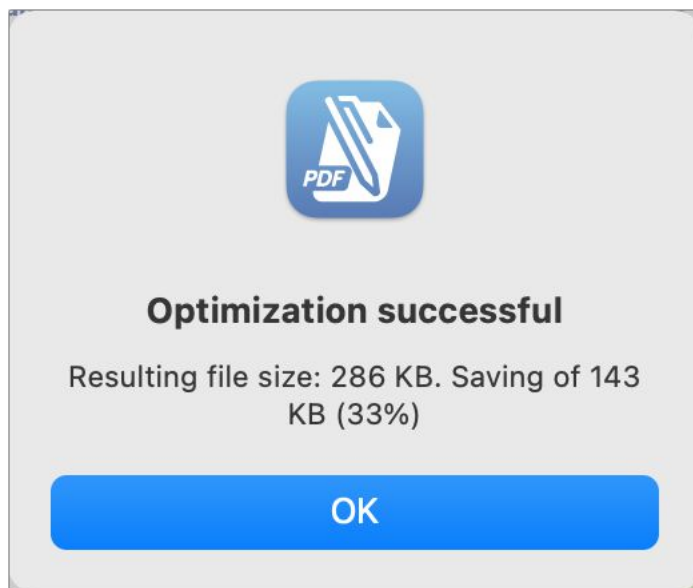


Figure 104: PDFpen tells you how much space was saved following an optimization pass.

And what about the option “Remove third party metadata”? When that is checked, optimization removes other information stored within the PDF. Many PDF applications store additional information in the documents they create, such as image thumbnails or extra data to help those applications edit the documents. With this option enabled,

PDFpen removes such information. Don't worry though: the metadata you want to include, visible and editable in the Document Information tab of [The Inspector](#), is left intact—PDF optimization doesn't touch the keywords, title, author, and subject metadata you intentionally provide.

Export as TIFF, JPEG, or PNG

PDFpen can save a PDF in several different image formats, which I describe below in [About the Image Formats](#). When you export a PDF to an image format, usually each page of the PDF becomes a separate image document, and all of the image documents are saved in a folder with the name you specify. The exported image documents have names like Page 0001.jpg and Page 0027.png.

Note: The [TIFF](#) format supports single multipage image documents, which is an option you can choose when you export to that format.

Here are a few points you should keep in mind when you export a PDF to an image format:

- **Images are not text:** When you save a PDF as an image, 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 format conversion either.
- **Images can be 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.
- **Images may have 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

multipage TIFF file. Similarly, while the JPEG format supports a maximum image size of four gigapixels, which likely is more than most individual PDF pages may require, some applications that handle JPEGs can have lower limits than that.

The image format exports have several options in common, and I describe those next.

Choose the Color Mode and Resolution

Each of the image export formats supports several color modes:

- **Color:** This export mode preserves all the colors in the original PDF.
- **Grayscale:** This choice removes the document's color, converting the various hues of the original into shades of gray. This mode produces a smaller image document than Color mode.
- **1-bit:** This mode removes color and brightness information, so that darker colors become completely black and lighter colors completely white. This mode is good for plain text documents that you intend to fax or photocopy and produces the smallest image document.

Note: 1-bit color mode is not available for JPEG exports.

You can also specify the resolution of the exported image documents. The higher the resolution you choose, the sharper the resulting images are, but also the larger the exported document file size.

You can choose from these four resolutions:

- **600 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.
- **300 dpi:** This resolution is also an adequate choice if you need to print the image document. 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.

- **Fax, 200 dpi:** Use this when fax quality is good enough. If you need to send a document via fax, this is the perfect resolution in which to store it.
- **Web, 72 dpi:** This choice produces the most compact image 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.

About the Image Formats

The three image export formats that PDFpen supports each have their own particular strengths and weaknesses. The following descriptions can help you decide the best one to choose for your specific needs.

JPEG

This format is named after Joint Photographic Experts Group, which created the standard. It is a “lossy” image format, in that it compresses the image data by removing information, and the amount of compression used affects the amount of data lost. JPEG files compressed at the highest quality can look indistinguishable from the original image; lower quality compression settings can make the colors less sharp and the image details less clear.

PDFpen exports PDF pages as very high quality JPEG files.

PNG

Portable Network Graphics format supports lossless images; compression is obtained by controlling the palette of colors used to render the image along with some advanced algorithms. PNG does not support the CMYK color space used for printing, but, instead, is optimized for being reproduced on digital screens.

TIFF

TIFF, the aged and venerable Tagged Image File Format, has been a standard for almost a century and a half—on the planet Mercury, that

is; on Earth it's been around for about a third 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.

As I mentioned above, 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, but keep it all in a single file, this option is for you.

TIFF does support the CMYK color space used for printing, and so is a good choice for images destined to be printed.

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 a Word file format choice. If you use PDFpenPro, you also see two other Microsoft format choices: one for Microsoft Excel, and one for PowerPoint.

Here's what the choices mean:

- **Word 2007 Document (DOCX):** Choose this to export the PDF as an editable Microsoft Word document. This conversion is performed locally and does not require an outside service or an Internet connection. The option is available in both PDFpen and PDFpenPro.
- **Excel 2007 Spreadsheet (XLSX)—Pro Feature:** This export format is intended for documents that consist primarily of spreadsheet-like data; that is, rows and columns of text and numbers. Like the Word export option, it doesn't require an Internet connection or

an outside service. Unlike the Word option, however, it is only available in PDFpenPro.

- **PowerPoint 2007 Presentation (PPTX)—Pro Feature:** 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. The PowerPoint export option requires an Internet connection and PDFpenPro: PDFpenPro securely transmits your PDF to the Nuance OmniPage Cloud Document Conversion Service for conversion.

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.

Depending on the size of the PDF to be converted, this can take only a few seconds or several minutes. The app presents a dialog showing how long it estimates the conversion will take. Although you can work on other PDFs while conversion is occurring, you cannot work on the document being converted until the process concludes.

Note that the conversion process, 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, the Inspector's Document Permissions tab in PDFpenPro (**Figure 105**) 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).

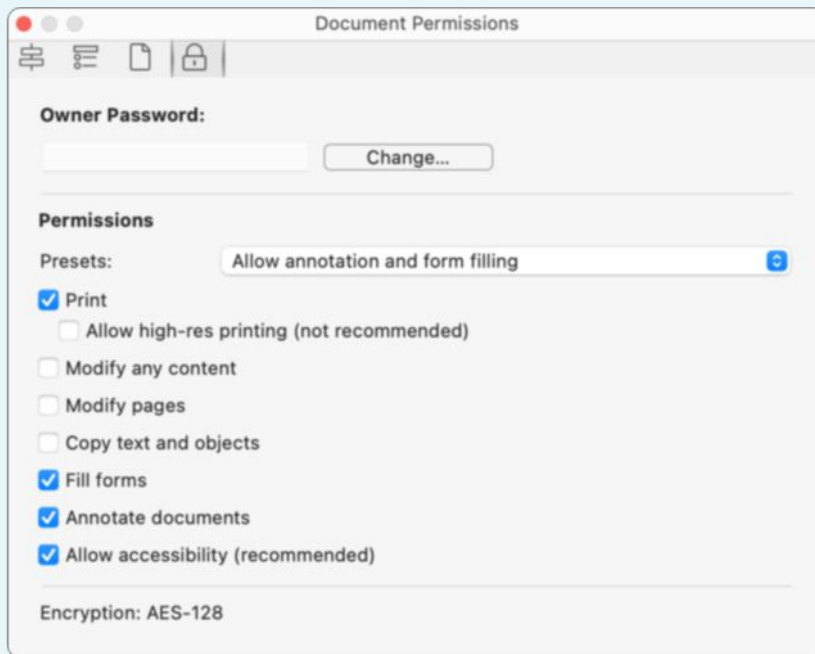


Figure 105: You can set any combination of these permissions.

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. (And note that if you permit high-res printing, others can make an unprotected copy by choosing to [Print to PDF](#).)

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 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 macOS. 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, Apple originally based Quartz itself 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 macOS).

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 106**).

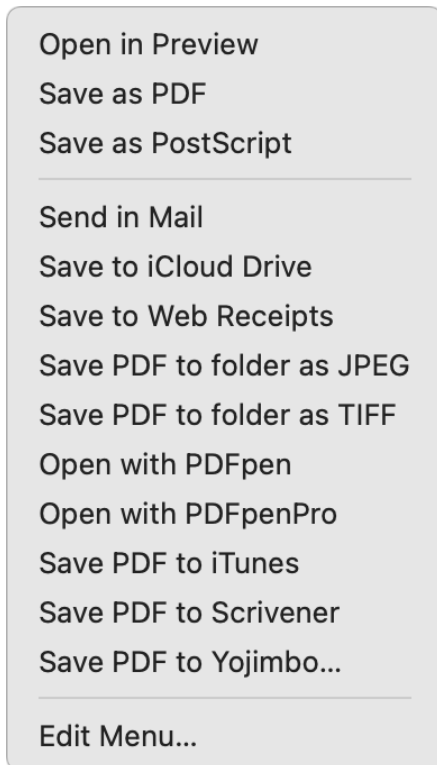


Figure 106: The Print dialog provides many choices under the PDF button.

The menu shown in **Figure 106**, 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 macOS.

Tip: You don't need to use the Send in Mail 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 on 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.

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 a number of actions designed to act upon PDFs.

To add workflows you've created with Automator to the Print dialog's PDF menu, choose the Edit Menu command at the bottom of the PDF pop-up menu. Use the dialog that appears (**Figure 107**) to add Automator workflows or to remove any workflows you don't want.

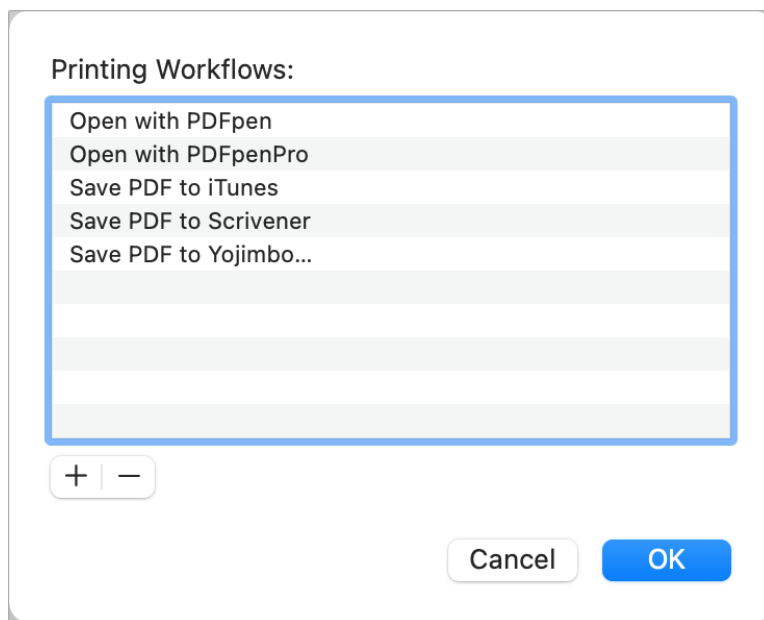


Figure 107: Add or remove workflows from the PDF menu in the Print dialog here. Choose Edit Menu from the dialog’s PDF menu to bring it up.

Print Your PDFs

Earlier in this book, in [Print Notes and Comments](#), I described the note- and comment-related print options PDFpen offers. **Figure 108** shows all the PDFpen options in the Print dialog (you may have to click a Show Details button in the dialog to reveal them).

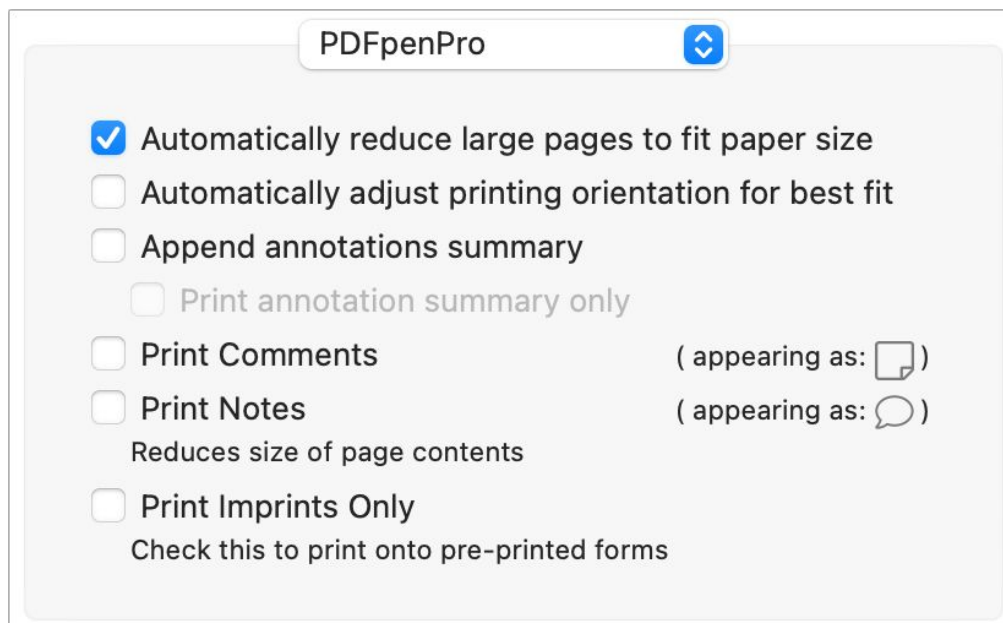


Figure 108: In PDFpen, choose File > Print to access these options.

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. You also have the option to print just the summary.

Use PDFpen in iOS and iPadOS

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 elsewhere also applies to PDFpen in iOS and iPadOS, 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 various ways you can [Get PDFs in and out of PDFpen in iOS and iPadOS](#).

Note: My descriptions of PDFpen for iPad & iPhone are based upon version 6.0.2.

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 109**) 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 109: The toolbar in PDFpen for iPad & iPhone hides when you don't need it (top, the iPad toolbar; bottom, the more compact small-screen version for iPhone).

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 110**).



Figure 110: The navigation tools live on the left side of the toolbar.

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

- **Back** : Tap this icon to save the current document and return to the Documents screen. Read the next section, [Get PDFs in and out of PDFpen in iOS and iPadOS](#), for more about accessing documents.
- **Undo** : Use this icon 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 icon? It makes sense if you think of it as providing a way to travel back through time.
- **Show Sidebar**  **and Hide Sidebar** : These icons 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 icons 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 111**) is an easy way to get to any page in your PDF quickly: just tap the thumbnail of the page you want to view.

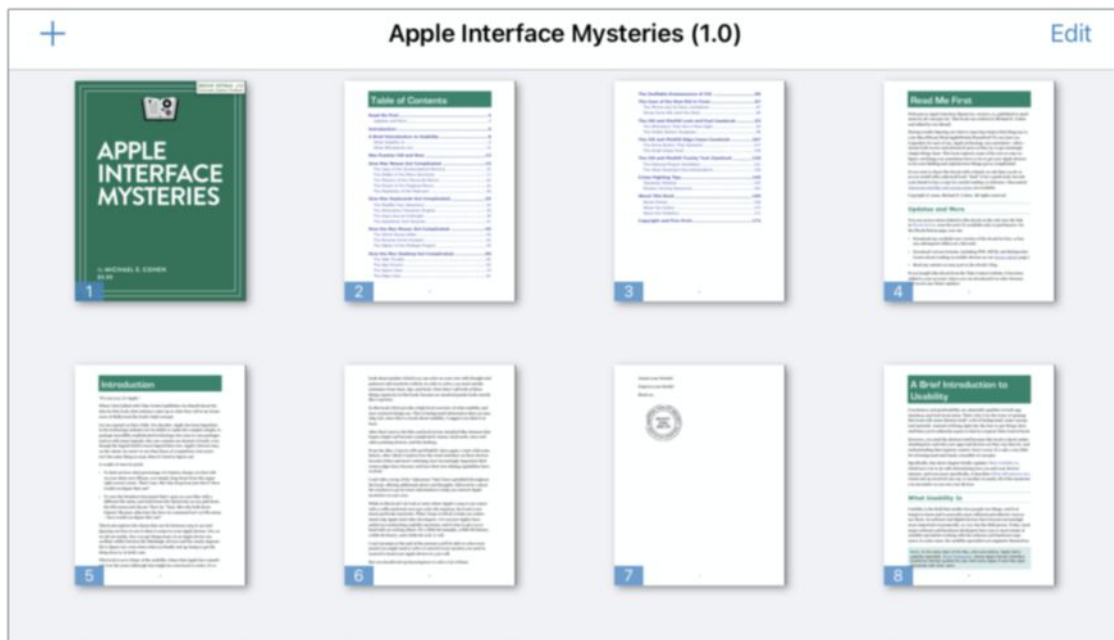


Figure 111: Tap a thumbnail in Thumbnail view to go to that page.

However, its power is revealed when you tap Edit to see its various editing options appear on the toolbar (**Figure 112**).



Figure 112: 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 pages corresponding to the selected thumbnails; then 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 **+** icon 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 **+** icon 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 113**). 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.

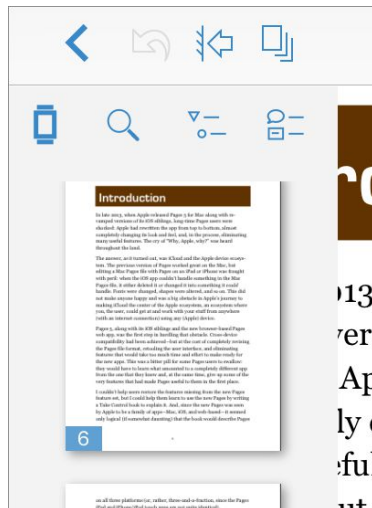







Figure 113: Tap an icon at the top of the sidebar to change what it displays.

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 114**).

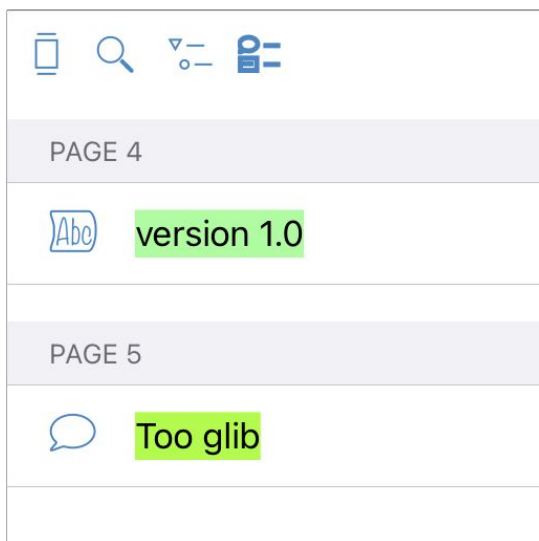


Figure 114: The icon beside each annotation listed in the sidebar indicates the type of annotation; listed here is one highlighted phrase and one note.


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 115**).








Figure 115: The right side of the toolbar is where many tools and commands live.

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/iPadOS Library Popover](#)), and the Tools icon; this last produces a popover containing an assortment of commands (see [The iOS/iPadOS Tools Popovers](#)).

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/iPadOS 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/iPadOS 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 116**).



Figure 116: The Highlight tools appear on the Editing Bar with the most recently used tool selected (here, the Highlight Text tool is selected).

The iOS/iPadOS Drawing Tools



The Drawing  tools (**Figure 117**) are made up of tools that correspond to those described in [The Draw Tools](#) along with the Scribble  tool described in [The Markup Tools](#).



Figure 117: 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/iPadOS Text Tools

The Text **T** tools (**Figure 118**) correspond to four of the tools described in **The Markup Tools**: a Text **T** tool for creating imprints; a Comment **[]** tool for creating comment boxes; a Note **[]** tool for placing note icons, with their associated pop-up note windows, on the page; and an Audio **[]** tool for creating and placing sound annotations.



Figure 118: Use the Text tools to add text imprints, comments, notes, and sound annotations to your PDF.

The iOS/iPadOS Tool Options

Each tool you select provides one or more tool options that appear as icons in the center of the Editing Bar (**Figure 119**). They are used for setting colors, fonts, line styles, and so on.

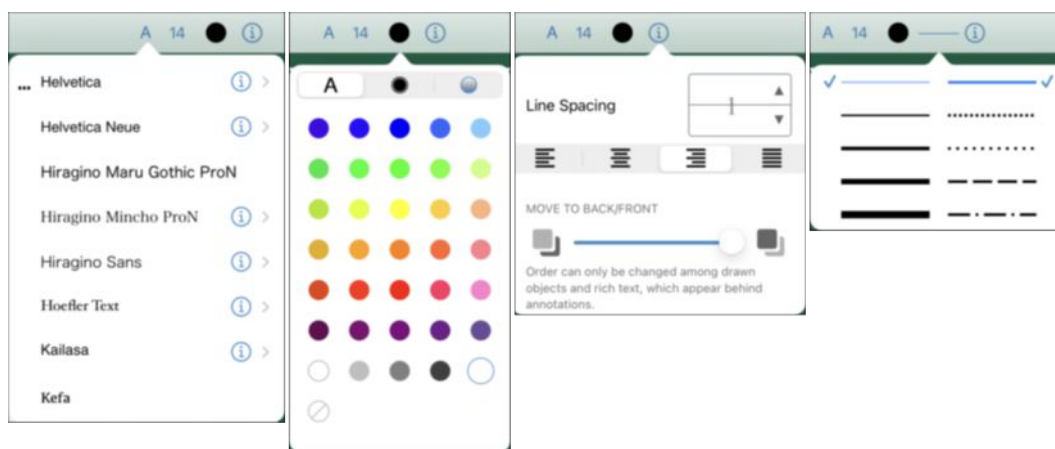


Figure 119: The tool options vary by tool. The first three sets of options shown above are provided by the Text tool and, starting from the left, allow you to choose a font, text color, and line spacing and text alignment. The rightmost popover shown above, provided by the Comment tool, sets border width and border line style. Not shown: the font size popover that appears when you tap the font size on the Editing Bar.

When you use highlighting tools or the Scribble tool, you may find yourself awkwardly trying to avoid accidental touches to the screen with your palm or wrist so they don't leave marks. That's what the Palm Guard is for: tap the left or right edge of the screen to have the Palm Guard overlay the screen (**Figure 120**). Only the open area between the top and bottom Palm Guard sections responds to touches.

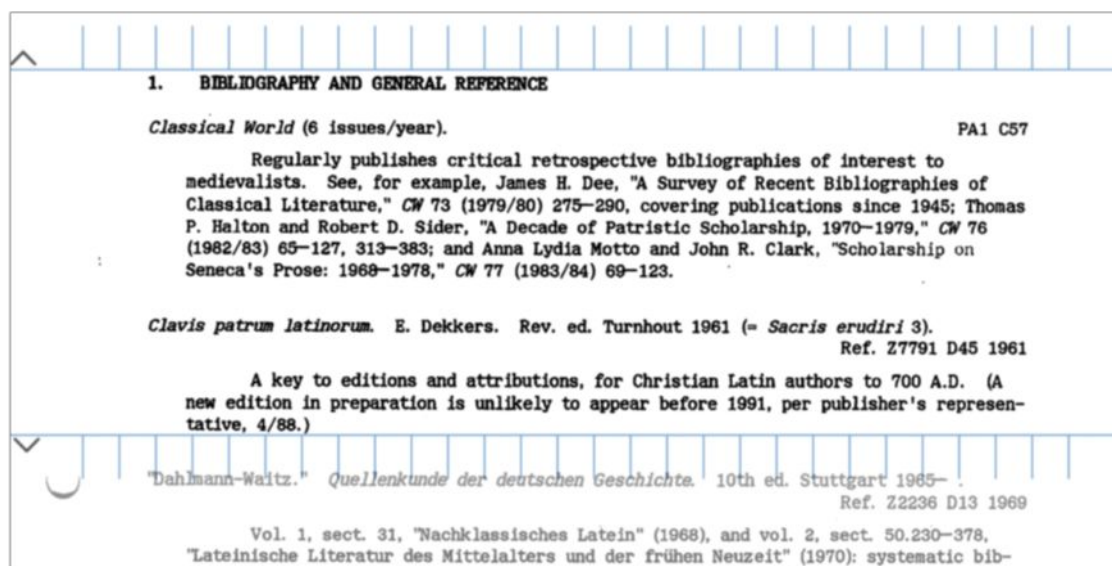






Figure 120: The Palm guard is active: only screen touches in the unguarded area between the two overlays affect the document.

To move the protection overlays, drag their up  and down  arrow icons.

Note: Palm protection automatically ends after a few seconds of inactivity.

A second tool option that appears when you use the Highlight and Scribble tools is a repositioning  tool. Tap this to allow pinch zooming and dragging gestures to reposition the PDF on the screen when the Highlight and Scribble tools are active; tap it again to return to highlighting and scribbling.

The iOS/iPadOS 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 121**). To see the popover, tap the Library  icon on the toolbar. The Library's con-

tents are similar to those described in [The Library](#), though there are some differences.



Figure 121: The PDFpen Library popover in iOS/iPadOS offers features similar to those in the PDFpen Library on the Mac, but there are some differences, such as the Photos collection, shown here.

Note: If you have signed in to iCloud on your Mac and have enabled iCloud Drive access for PDFpen or PDFpenPro on that Mac, your Library contents sync between your Mac and your iOS/iPadOS device.

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  icon. Tap Edit to rearrange the items in the collection or to delete items from it.
- **Photos** : Tap this to browse the Photos library on your iOS/iPadOS device—select a photo to add it to a PDF. Tap the Camera  icon to take a photo with your device's camera and add that

photo to the PDF. Tap the information ⓘ icon on 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/iPadOS Tools Popovers

Yes, popovers, plural. There are two versions (**Figure 122**): 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.

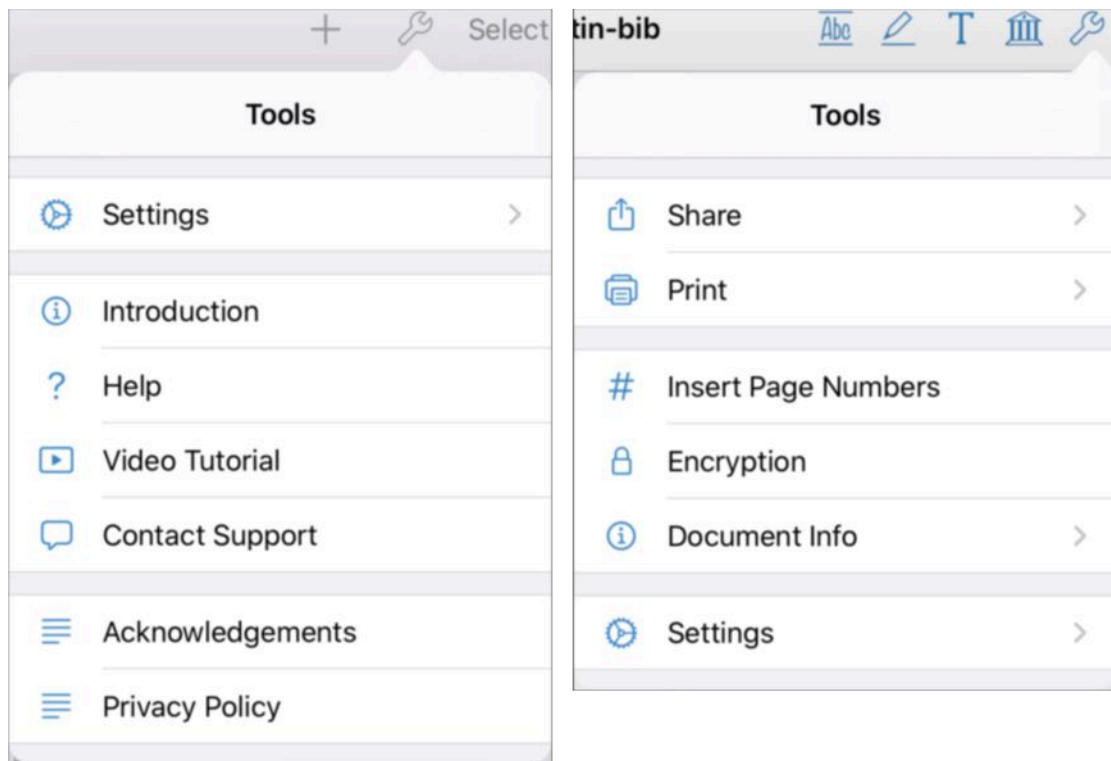


Figure 122: The Tools popover offers different options on the Documents screen (left) and on the PDF editing screen (right).

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

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

The Tools popover on a PDF editing screen provides access to PDFpen's settings as well, but the rest of the popover's 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 [Add Headers, Footers, and 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/iPadOS Settings

The Settings popover, accessed from either Tools popover described just above, provides configuration options for the PDFpen iOS/iPadOS

app (**Figure 123**). It's also a quick way to find out which version of the app is currently installed.

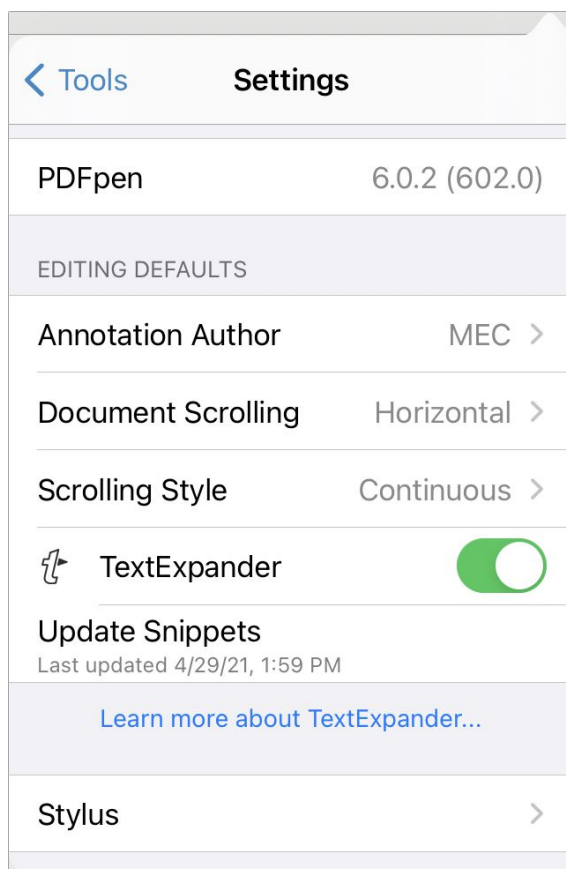


Figure 123: Use this to set app-wide configuration options.

Note: The iOS/iPadOS Settings app also has an entry for PDFpen, which contains a few switches to permit PDFpen to access your device's features, and, more importantly, where you want the app to store its documents, which is described just ahead in [Get PDFs in and out of PDFpen in iOS and iPadOS](#).

Here are the available Settings options:

- **Annotation Author:** Tap this to enter the name with which your annotations are labeled.
- **Document Scrolling:** This controls the direction in which you swipe to move from page to page in a multi-page PDF.
- **Scrolling Style:** Change between continuous page display and paginated when you scroll.

- **TextExpander:** If you use Smile's [TextExpander + Keyboard](#) app, enable this switch to use your TextExpander snippets with the standard iOS/iPadOS keyboard instead of having to switch to the custom TextExpander keyboard.
- **Update Snippets:** If you use TextExpander 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 third-party pressure-sensitive stylus to use with PDFpen. The app supports several such styli (it automatically supports the Apple Pencil).

The iOS/iPadOS Edit Menu

When you select text or an object in your PDF, a contextual edit menu appears above or below the selection (**Figure 124**).

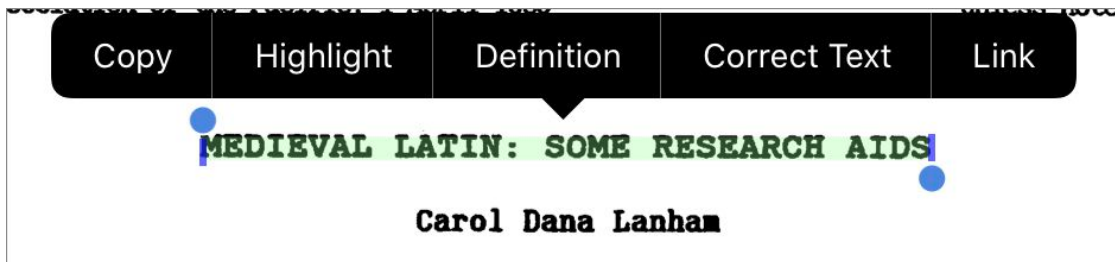


Figure 124: The edit menu appears when you select something in the PDF.

The commands available on the menu vary depending on the selected item. Typically, but not always, this is where you find commands like Copy and Paste.

Here are some of the other items that might appear on the menu:


- **Correct Text:** You find this item on the edit menu when text is selected. Tap it and you can enter corrections in a new imprint that PDFpen creates for you as described in [Use the Correct Text Command](#).
- **Definition:** When you select a single word of text, you also get a Definition item that, when tapped, looks the word up in your device's built-in dictionary.

- **Watermark:** When you select a graphic that has been placed in the PDF, you get a Watermark item. Choose Watermark place a watermark on the pages of the PDF based on the selected graphic. You get a popover that provides various layout options for the watermark.
- **Delete:** When you select any item placed in the PDF, you can choose this item to delete it.
- **Link:** Use this to link the selection to another location in the PDF or to a URL.

Tip: Want to remove a Highlight? You can press and hold a highlight to select it and then choose Delete from the edit menu to do away with it.

Get PDFs in and out of PDFpen in iOS and iPadOS

Pundits and press have often referred to Apple's iOS (and iPadOS) as a “walled garden” and the metaphor is apt, especially when it comes to apps and their documents. The iOS/iPadOS file management system certainly does have more walls than the Finder on a Mac, in which apps can access documents stored in almost any user folder and where users can arrange their documents howsoever they like. But with the advent of the Files app and its features, which third-party apps like PDFpen can adopt, the walls are much lower than they used to be, with plenty of gates and openings in the hedges you can use.

When you open PDFpen in iOS/iPadOS, if you are not looking at a PDF you're looking PDFpen's gateway into the iOS file management system (which I shall henceforth call the Documents screen), and if you *are* looking at a PDF, a tap of the Back  button takes you to that gateway.

The Documents screen looks and acts very much like the display that the Files app uses; if you're familiar with Files, PDFpen's Documents screen should look equally familiar.

Browse Documents in iOS/iPadOS

From the Documents screen you can navigate among all the locations available to your iOS/iPadOS device in which you may have stored a document compatible with PDFpen (**Figure 125**).

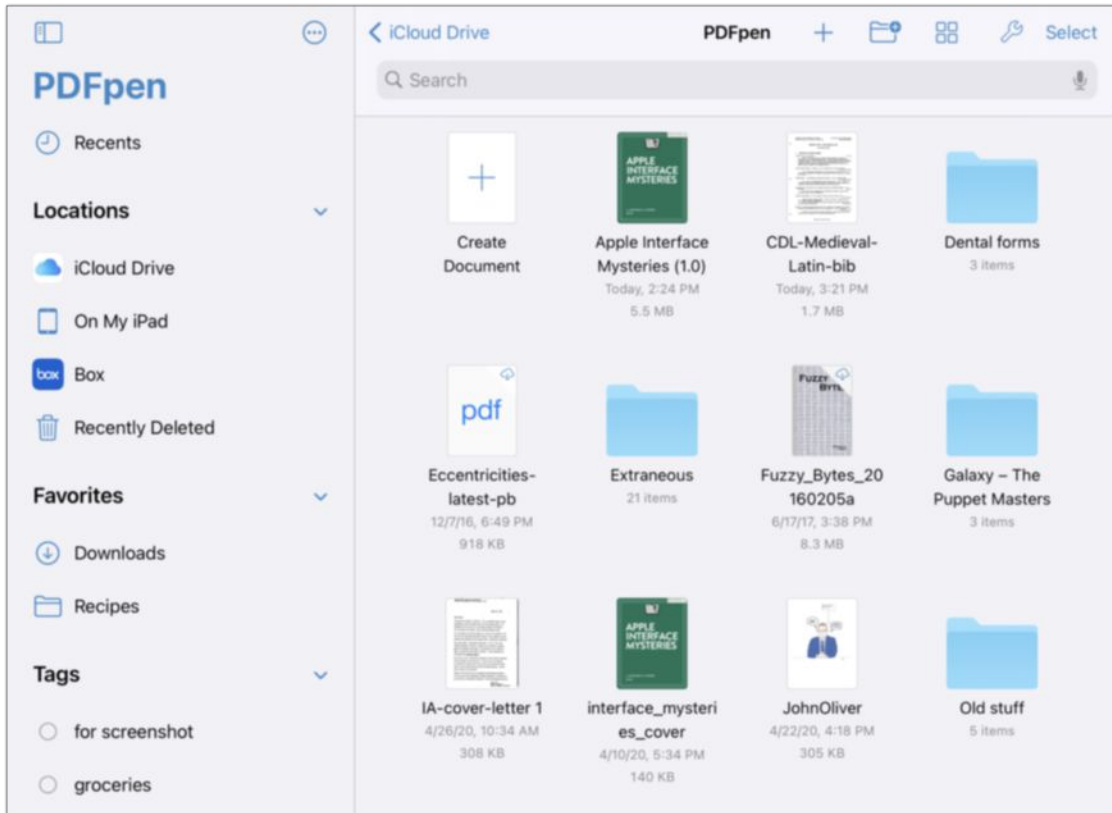


Figure 125: Use the Locations sidebar to navigate to all the locations on or connected to your device where you may have PDFs stored.

The screen features a Locations sidebar that lists locations in which you can open and create documents, and a main pane that presents documents at the current location.

That is, it looks this way in iPadOS: in iOS, a Browse pane occupies the whole screen in portrait mode, and you get to the Locations sidebar by tapping the Back button at the upper left of the screen until it appears, filling the screen; iOS devices also offer a button bar at the bottom of the screen with which you can quickly switch from Browse pane showing the current location to a Recents view. (I'll keep calling the Locations screen on iOS devices the "Locations sidebar" through-

out the rest of this section, even though it occupies the entire screen, and even though it shows more than just locations.)

The main pane you see when browsing shows you the documents stored at the currently selected location; the location's name is displayed at the top of the pane (in **Figure 125** above, it displays my iCloud Drive's PDFpen folder). The gestures you make in this pane are familiar:

- To work on a document, tap it.
- To open a folder to see the documents inside, tap it.
- To rename, move, delete, share, or tag an item, touch and hold its thumbnail to see a contextual menu of useful commands (**Figure 126**). (Note that you can simply drag an item to move it into a folder if the folder is visible on the same screen.)

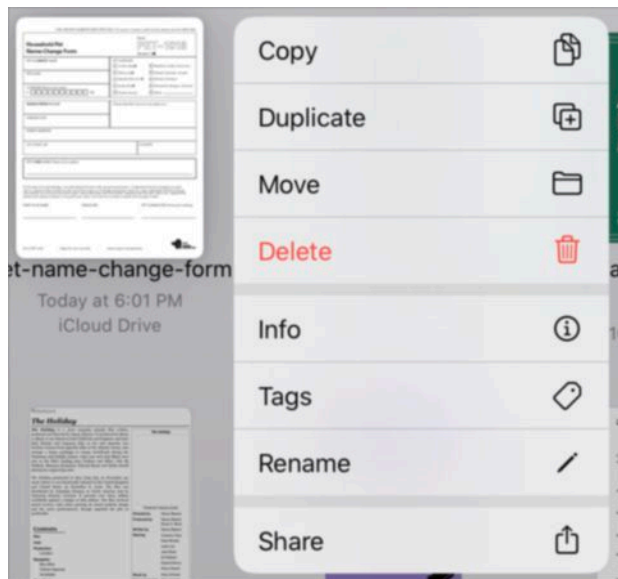


Figure 126: Touch and hold a document to see a menu of commands that act upon the document.

- To move, share, or delete multiple documents, first tap Select at the top right; the commands for handling selected items appear at the bottom of the pane.

Tip: When you select multiple PDFs, a Join button appears on the pane’s toolbar. Tap it to create a new PDF that contains all the selected documents.


A Search field also appears at the top of the main pane. Type in it to see documents that match your search string, no matter where they’re located.

To change the currently selected location and view its contents, tap a location in the Locations sidebar. Although the location you’ll probably use most often is iCloud Drive, you can use *On My Device* to keep documents in the app’s local storage instead of in the cloud.

No matter what location you are viewing, the toolbar area at the top of the main Browse pane contains buttons you can tap to create a new document at that location, create a new folder for documents, and change the view to an ordered list (**Figure 127**).





Figure 127: Use these buttons at the top of the Browse pane for creating new documents and folders, and for changing how the view is displayed.

And speaking of locations, you aren’t limited to iCloud Drive and local storage on your device: you also have other storage locations available to you. These locations can be supplied, often along with apps that support them, by third-party vendors, such as Dropbox, Box, or Google, or when you connect a compatible USB storage device. Tap the More  button at the top of the Locations sidebar and then tap Edit Sidebar to show or hide any of them and to change their order.

There is one item in the Locations sidebar that you can’t move or hide: Recently Deleted. Tap it to see all the items you have deleted from the app over the last 30 days—that is, anything that Apple has a say about; third-party developers and server administrators may keep or discard items according to their own policies.

A Few of Your Favorite Things

When you press and release a folder thumbnail in the Browse view and then choose Favorite from the menu that appears, iOS/iPadOS adds the folder to the Favorites section of the Locations sidebar. Add favorite folders to make them easy to navigate to with a tap. (For example, I have favorited my PDFpen folder so I can get to it quickly no matter what location I happen to be browsing.)

To remove a folder from the Location sidebar's Favorites section, tap the list's More  button, choose Edit Sidebar, and then tap the Delete  button beside the folder.

Tag Documents in iOS/iPadOS

As on the Mac, you can apply tags to any document, and you can make up new tags. To add a tag, follow these steps:

1. Touch and hold briefly on a document thumbnail, and then release.
2. On the menu that appears, tap Tags (**Figure 128**). A popover that lists all of your available tags appears, as well as a button at the top of the list you can tap to create a new tag.

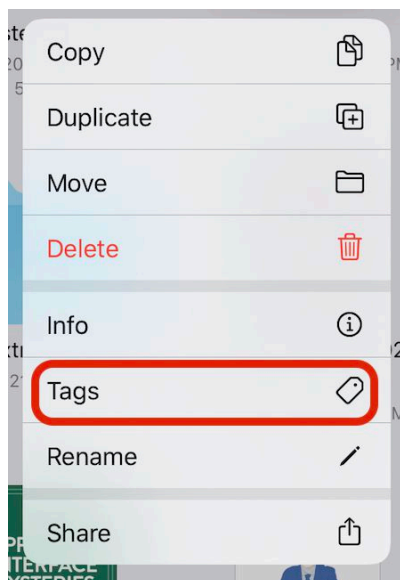


Figure 128: Tap Tags on this menu to apply existing tags to a PDF or to create new tags to apply.

3. Tap one or more tags in the popover's list to assign them to your document.

Where Do New Documents Go?

You may be wondering where newly created documents are stored. By default, they end up in PDFpen's App Library folder in your iCloud Drive, just as they always did—that is, if you are using iCloud Drive. If not, your files end up in the app's local storage area on your device, or in the currently browsed location.


And what are App Library folders? They are folders that, in your iCloud drive, look just like normal folders, but they can hold only files compatible with the associated app—you can't even drag in an incompatible file in iCloud Drive in the Finder. When you use iCloud Drive, PDFpen creates an App Library folder. Note, however, that since PDFpen allows you to add file attachments, the PDFpen App Library allows a wide variety of file types to be dragged into it.

More Ways to Get at Files



Even with the rich file management capabilities that iOS/iPadOS provides to PDFpen, you may still need to move files from other sources into PDFpen, and to send files from PDFpen, to other locations than those available on the Locations sidebar.


For that I recommend you consult two short topics from the PDFpen online help: [Import](#) and [How to Export Documents](#).

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. The command requires you to specify a scripts folder in which to store the scripts, but helpfully shows you where to find it.

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 > Preferences > General.

Neither the PDFpen scripts nor the Populate Scripts Menu command appear on Apple’s Script  menu. The AppleScript  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 ⌘-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.


Tip: Although the next two scripts still have their uses, you may want to use PDFpen's capability to [Add a Watermark](#) instead.


- **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 5-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 > Headers, Footers, Page Numbers > Insert command, but it be useful in 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 > Headers, Footers, Page Numbers > Insert 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 5-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 Shift 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 AppleScript  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.PDFpen13.MacAppStore`
- PDFpenPro from the Mac App Store: `~/Library/Application Scripts/com.smileonmymac.PDFpenPro13.MacAppStore`
- PDFpen from Smile: `~/Library/Application Scripts/com.smileonmymac.PDFpen`
- PDFpenPro from Smile: `~/Library/Application Scripts/com.smileonmymac.PDFpenPro`
- PDFpen from Setapp: `~/Library/Application Scripts/com.smileonmymac.pdfpen-setapp`

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 websites 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.)
- [Prepressure.com](#): Customer support engineer Laurens Leurs maintains this site, which specializes in useful articles about prepress topics, including PDF.
- [*The MacSparky Paperless Field Guide*](#): This book contains lots of information about going paperless, and it provides even more ways to use PDFpen in that endeavor.
- [*Take Control of Your Paperless Office*](#): This book, by Joe Kissell, is the seminal work on paperless PDF workflows.

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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, produced interactive CD-ROMS, helped create the first commercial ebooks, written a novel, 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.

Michael is the author of [*Apple Interface Mysteries*](#), a book that attempts to explain how things got so complicated on your Apple devices. He is also the author of [*Take Control of Pages*](#), the only book we know of that covers Apple's Pages apps on both Mac *and* iPadOS (as well as providing additional information about the iOS and the web apps). Plus it has a delicious chocolate-colored cover.

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