PDF-XCHANGE

PDF-XChange Printer Standard V10 USER MANUAL

Head Office:

PDF-XChange Co. Ltd,
P.O. Box 79,
9622 Chemainus Road,
Chemainus, British Columbia
V0R 1K0
Canada

Sales:

Tel: (+00) 1-250-324-1621
Fax: (+00) 1-250-324-1623
sales@pdf-xchange.com
https://www.pdf-xchange.com

In Europe:

PDF-XChange Co. Ltd,
Horsmanshoad,
Pickwell Lane,
Bolney, West Sussex
RH17 5RH
United Kingdom

Sales:

Tel: (+00) 1-250-324-1621
Fax: (+00) 1-250-324-1623
sales@pdf-xchange.com
https://www.pdf-xchange.com

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1 Welcome

 PDF-XChange Standard V9

PDF-XChange Standard is a virtual printer that is used to convert industry-standard file formats to PDF. It's compatible with files from almost all **Windows** applications such as **MS Word, Excel** and **AutoCAD.** It features an optimized, hybrid engine that significantly increases the quality of conversion for images and image-based text characters, and prints to both **GDI** and **XPS. PDF-XChange Standard** installs as a virtual printer that generates fully-compatible, industry-standard, native PDF files. It is used in the same manner as a standard printer - simply open files in their native application, select the option to **Print** and then select **PDF-XChange Standard** from the list of available printers. The document will then be converted into PDF. You can also right-click web pages and click **'Convert to PDF'** to convert web pages to PDF. There is a wide range of customizable settings available that can be used to enhance and edit converted documents, as detailed in the later chapters of this manual.

PDF-XChange Standard requires no additional 'plug-ins' or software. However, we recommend installing another of our products, **PDF-XChange Editor,** for the viewing and manipulation of files created using **PDF-XChange Standard.** It's completely free, and the two products are designed to work in tandem. The free version of **PDF-XChange Editor** is available at the download page of our website **here.**

We offer several other applications for the manipulation of PDF and image files. Please see the **PDF-XChange Products Page** for further information. The **User Forums** are an excellent resource for troubleshooting, and our **Knowledgebase** contains over four hundred articles about our software and other relevant information. If you have any queries then please **Contact Us.**

This manual is composed of the following sections:

- **Installation** details the installation process, system requirements, installation switch options and licensing details for the software.
- **PDF-XChange Standard User Manual** details the operations that the software performs and associated settings.
  - The **Features Overview** details the main features of **PDF-XChange Standard.**

- The **Printer Settings** section details the customizable features and functionality of **PDF-XChange Standard,** and is structured to match the UI of the software.
- The **PDF Saver** section details the **PDF Saver** feature, which is used to determine some settings of **PDF-XChange Standard,** and to perform print jobs from the command line.
- The **MS Office Toolbar Add-in** section details the **PDF-XChange Standard** toolbar add-in for **MS Office** applications.
- The **MS Outlook Add-in** section details the **MS Outlook Add-in**, which is used to convert emails to PDF.
- The **OFFice2PDF** section details the **OFFice2PDF** feature, which enables the batch-conversion of **MS Excel/Word** and **(*.html)** documents to PDF.
- The **Features Added in Version 9** section details all features added in version 9 of the software.

A PDF version of this manual is available **here.** The system administrator's guide, for managing **PDF-XChange** products across an enterprise, is available **here.**

The PDF Format

The **Portable Document Format (PDF)** is an internationally-recognized file format that was developed in 1992 in order to present documents, including text formatting and images, between users of different platforms, application software, hardware and operating systems, who may not have access to mutually-compatible application software. PDF files are based on the **PostScript** page-description language, and every PDF file contains a complete description of a fixed-layout flat document, including the text, fonts, vector graphics, raster images and other information required to display it. PDF was standardized as an open format in 2008, and since then has expanded to contain a range of additional content besides flat text and graphics, including logical structuring elements, interactive elements such as annotations and form fields, layers, rich media (including video content), three dimensional objects that use the **U3D** or **PRC** formats, encryption options, digital signatures, file attachments and document metadata. The specifications of the PDF format are defined and maintained by the **International Organization for Standardization (ISO),** which determines the content that is permitted in PDF documents, the properties of that content and the manner in which it can be manipulated. The original PDF specification was created in 1993, and since then it has been regularly expanded and enhanced to include additional content. The **ISO** published the most recent specification, **PDF 2.0, ISO 32000-2:2020,** in December 2020. All documents that are created and/or edited with **PDF-XChange** software conform to the **ISO** specification and are therefore compatible with all systems and software worldwide that also conform to the **ISO** specification.

2 Installation

Installation

Follow these steps to install **PDF-XChange Standard:**

1. Use the link in your purchase confirmation email, or the download option on the product page **here,** to download an evaluation version of **PDF-XChange Standard.**

2. When the download is complete, click the **PDFXStd9.zip** file to open the containing folder.

3. **PDFXStd9** is displayed next to an icon. Double click the text or the icon to open the **Run/Cancel** dialog box.

4. Click **Run** to open the **PDF-XChange Standard** Setup.

5. Click **Next.**

6. Read the license agreement and select the check box to continue.

7. Click **Next.**

8. Select either **Custom** or **Complete** setup type and select the installation location.

9. Click **Next** and follow the instructions to install the software. Please note that the first time the installer is run it will prompt for a registration number/activation code. We recommend that this is copied and pasted from your receipt in order to avoid mistakes.

When an evaluation copy of **PDF-XChange Standard** is installed, all output is generated with two watermark stamps on each page. When a full version is purchased, it is necessary to enter the serial number provided to ensure that all future output is free of the evaluation watermarks. Follow the steps below to register your license key:

1. Install the software using the steps outlined above.

2. Move to the **Control Panel** and click **Devices and Printers.**

3. Right-click **PDF X-Change Printer** and click **printing preferences** in the submenu.

4. Select the **About** tab in the main toolbar.

5. Click the **Registration** button in the **About** window.

6. Click the **Add New Serial Key** button.

7. Enter the serial key into the text box, or copy and paste it from the clipboard.

8. Click **Continue** to register.

If an evaluation version of **PDF-XChange Standard** is already installed, then there is no need to install it again. Simply follow the steps outlined above to register the product.

Note that it is not necessary to be online to install a license for **PDF-XChange Standard.** If you have a hard copy of your license key (for example on a USB stick) then you can simply copy it into the text box in the **Registration** section detailed above in order to register the license on an offline machine.

VERY IMPORTANT

Please keep your serial key/activation code safe. Do not share it with other parties, as doing so constitutes an illegal breach of copyright. If we discover evidence of abuse then updates will be disabled for your account. Serial keys/activation codes found on websites offering free and illegal software distribution will be disabled immediately. We monitor such websites on a daily basis. Help us safeguard the integrity of our products to ensure that their future development is made possible. Theft of our software deprives us of investment that improves our products for the benefit of all clients.

2.1 System Requirements

System Requirements

PDF-XChange Standard supports all **Windows** (32/64 bit) operating systems from **Windows 7** and later, including **Windows 11.**

Please note the following:

- All versions from **V4** to **V9** are **Microsoft/Citrix Terminal Server** compatible.
- All versions from **V4** to **V7** are **Windows XP/Vista** compatible.
- **V3** is still available for **Windows 95/98.**
- We recommend that users install the latest **Microsoft Windows** service packs and updates before using our products, as doing so will ensure the greatest possible performance of the software.
- Our products - in particular the printer drivers that **PDF-XChange Standard** and **PDF-XChange Lite** utilize - are not designed to work in virtualized environments such as the **XenApp** software.
- There are some limitations to product support for **Windows XP** as **Microsoft** have stopped supporting it. Further information about this issue is available **here.**
- If you are using **Windows 7** then please ensure you have the latest release and all available fixes - otherwise you may encounter issues, as detailed **here.**

2.2 Switches for MSI Installers

 Switches for MSI Installers

The most useful options for msiexec are detailed below. Please note that parameters are case sensitive. All available options are detailed **here.**

The command line for installation is: **msiexec /Option <Required Parameter> [Optional Parameter] [PROPERTY=PropertyValue]**

Install Options

/package or **/i**

This switch installs or configures the product specified.

Syntax

<Product.msi>

/a

This switch installs the product specified on the network as an administrative install.

Syntax

<Product.msi>

/j<u|m>

This switch advertises the specified product. "**u**" advertises to the current user, "**m**" advertises to all users.

Syntax

<Product.msi>

Parameters

- **[/t <Transform List>]**
- **[/g <Language ID>]**

/uninstall | /x

This switch uninstalls the product specified.

Syntax

<Product.msi>

Parameters

The parameter for this switch can be either an .msi file or the relevant product code.

Display Options

/quiet

This switch installs the application without user interaction.

/passive

This switch installs the application in unattended mode. The user will see only the progress bar.

/q[n|b|r|f]

This switch sets the user interface level. **"b"** installs a basic UI, **"f"** installs a full UI and is the default setting, **"n"** means that no UI is installed, **"r"** installs a reduced UI.

Restart Options

/norestart

This switch disables the automatic system restart when installation is complete. (Please note that many **PDF-XChange** products require a restart to function properly).

/promptrestart

This switch prompts the user for a restart when it is necessary.

/forcerestart

This switch forces a system restart when installation is complete.

Logging Options

/l

This switch defines the logging level for installation.

Syntax

<Logfile>

Modifiers

a - start up of actions.

c - initial UI parameters.

e - all error messages.

i - status messages.

m - out of memory or fatal exit information.

o - out of disk space messages.

p - terminal properties.

r - action-specific records.

u - user requests.

v - verbose output.

w - nonfatal warnings.

x - extra debugging information.

+ - append to existing file.

! - flush each line to the log.

* - log all information except for verbose output and extra debugging information.

/log

This switch is the equivalent for **/l*** <LogFile>.

Syntax

<LogFile>

Repair Options

/f

This switch repairs the product specified.

Syntax

<Product>

Parameters

The parameter for this switch can be either an .msi file or the relevant product code.

Modifiers

> **a** - forces the reinstallation of all files.
>
> **c** - if a file is missing or checksum does not match the calculated value.
>
> **d** - if a file is missing or a different version is installed.
>
> **e** - if a file is missing or an equal or older version is installed.
>
> **m** - all required computer-specific registry entries. This is a default setting.
>
> **o** - if a file is missing or an older version is installed. This is a default setting.
>
> **p** - only if a file is missing.
>
> **s** - all existing shortcuts. This is a default setting.
>
> **u** - all required user-specific registry entries. This is a default setting.
>
> **v** - runs from source and re-caches the local package.

Additional options and more detailed explanations are available at the Microsoft website.

Standard Properties

ADDLOCAL

The value of the **ADDLOCAL** property is a list of features, delimited with commas, that install locally. If it is not used then all available options will be installed. If it is used then all required features must be specified.

Syntax

ADDLOCAL=<list of features>

Features

- **F_Drivers** - the **PDF-XChange Standard** print driver and its components.
- **F_Office2PDF** - components of the **Office to PDF** feature, which enables the batch-conversion of **MS Office** documents to PDF. (This requires **F_Drivers**).
- **F_OfficeAddin** - the addin that provides extended support of **MS Office** products. (This requires **F_Drivers**).
- **F_IEAddin** - the add-in for MS Internet Explorer that facilitates the conversion of web pages to PDF format. (This requires **F_BrowserExts**).
- **F_Langs_Drv** - the files that allow the localization of **PDF-XChange Standard** and its components. (This requires **F_Drivers**).
- **F_Updater** - the updater for the applications that **PDF-XChange Products** produce.
- **F_KeyInstaller** – the key installer for **PDF-XChange** applications.
- **F_BrowserExts** - plugin for browsers that enables the conversion of web pages into PDF files.
- **F_ChromeExt** - extension for Chrome browser that enables the conversion of web pages into PDF files. (This requires **F_BrowserExts**).
- **F_EdgeExt** - extension for Edge browser that enables the conversion of web pages into PDF files. (This requires **F_BrowserExts**).

A comprehensive list of properties defined by the **Windows** installer is available **here.**

Product Specific Properties

INSTALLLOCATION

This property specifies the folder in which products are installed.

Syntax

INSTALLLOCATION=<installation folder>

PNAME

Specifies the printer name. The default value is **"PDF-XChange Standard."**

Syntax

PNAME=<printer name>

SET_PRINTER_AS_DEFAULT

If this property is not specified, or specified with a value of "1", then **PDF-XChange Standard** will be set as the default printer.

Syntax

SET_PRINTER_AS_DEFAULT="0"

DESKTOP_SHORTCUTS

If this property is not specified, or specified with a value of "1", then the installer will place shortcuts on the desktop for installed applications.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

If this property is not specified, or specified with a value of "1", then the installer will create a program menu group for installed applications and their components.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

USERNAME

This property specifies the username to which applications will be registered.

Syntax

USERNAME=<username>

ORGANIZATION

This property specifies the organization name to which applications will be registered.

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

KEYFILE

This property specifies the UNC location of the license vault file <filename>.xcvault. See **here** 26 for further information.

Syntax

KEYFILE=<path to xcvault file>

KEYDATA

This property specifies the registration key.

Syntax

KEYDATA=<registration key>

APP_LANG

This property specifies a language for the **PDF-XChange Standard** print driver. (This requires **F_Langs_Drv** in order to operate). This property uses the "language culture name" to define languages. For example German is "de-DE". The **<id>** for target languages is available **here.** The parameters **"Auto", "Builtin"** and **"None"** can also be used instead of a language culture name. **Auto** uses the system locale language, **Builtin** uses US English and **None** retains the existing language in cases where the software is being upgraded, or operates in the same manner as **Auto** if the software is being installed for the first time.

Syntax

APP_LANG=<id>

NOUPDATER

If this property is unspecified, or specified with a value of "0", then the **PDF-XChange Updater** 47 will be installed. If specified with a value of "1" then the updater will not be installed. (Available from build 310).

Syntax

NOUPDATER=<0>

SCHEDULEUPDATER

If this property is unspecified, or specified with a value of "1", then the installer will add a task to the task scheduler to check for software updates.

Syntax

SCHEDULEUPDATER=<0>

MSI Installer Examples

- Install the software in quiet mode to the folder "C:\Program Files\My PDF Applications":

  ```
  msiexec /i StandardV9.x64.msi /quiet INSTALLLOCATION="C:\Program Files\My
  PDF Applications"
  ```

- Install the software in quiet mode to the default folder and specify the user license information:

  ```
  msiexec /i StandardV9.x64.msi /quiet USERNAME="John Doe"
  USERMAIL="abc@a.b.c" KEYFILE="\UNC\path\to\xcvaultfile"
  ```

- Install only **PDF-XChange Standard** and the updater:

  ```
  msiexec /i StandardV9.x64.msi /quiet ADDLOCAL="F_Drivers,F_Updater"
  ```

- Install the software with all features, German as the UI language and a 'basic' UI. (Please note that **ADDLOCAL** is not being used, therefore all components, including **F_VLangs,** are installed:

  ```
  msiexec /i StandardV9.x64.msi /qb APP_LANG=de-DE
  ```

2.3   Switches for EXE Installers

Switches for EXE Installers

The EXE installers support both 32 and 64 bit versions of MS Windows. However, the Microsoft MSIN is not always compatible with a unified 32/64 bit installation. If there is any uncertainty about the details of the system onto which **PDF-XChange Standard** is being installed, then using the EXE installer is recommended. This is because it has the ability to identify the target computer's system architecture and install 32 or 64 bit binaries accordingly.

The command line for installation is **PDFXStd9.exe /Option [Optional Parameter] [PROPERTY=PropertyValue]**

The most useful EXE installation switches for **PDF-XChange Standard** are detailed below. Please note that parameters are case sensitive. All available options are detailed **here.**

Install Options

/install

This switch installs or configures the product specified. It is the default setting.

Syntax

<Product>

/uninstall

This switch uninstalls the product specified.

Syntax

<Product>

/layout

This switch creates a complete local copy of the bundle in the directory.

Display Options

(Please note that the default settings display the UI and all prompts during installation).

/quiet

This switch installs the application without user interaction.

/passive

This switch installs the application in unattended mode. The user will see only the progress bar.

Restart Options

/norestart

This switch suppresses any attempts to restart the computer on which the installation is taking place. The default setting is for the UI to prompt before restarts take place.

Logging Options

/log

This switch logs to a specific file. The default setting is for a log file to be created in %TEMP%. This is also the case if the path is not specified.

Syntax

<LogFile>

Repair Options

/repair

This switch repairs existing installations of the product.

Product Specific Properties

USERNAME

This property specifies the username for which applications are registered.

Syntax

USERNAME=<username>

ORGANIZATION

This property specifies the organization name for which applications are registered.

Syntax

ORGANIZATION=<organization name>

USERMAIL

This property specifies the user email.

Syntax

USERMAIL=<user email>

APP_LANG

This property specifies a language for the **PDF-XChange Standard** print driver. This property uses the "language culture name" to define languages. For example German is "de-DE". The **<id>** for target languages is available **here.** The parameters **"Auto", "Builtin"** and **"None"** can also be used instead of a language culture name. **Auto** uses the system locale language, **Builtin** uses US English and **None** retains the existing language in cases where the software is being upgraded, or operates in the same manner as **Auto** if the software is being installed for the first time.

Syntax

APP_LANG=<id>

SET_AS_DEFAULT

If this property is not specified, or is specified with a value of "1", then **PDF-XChange Standard** will be set as the default application for printing PDF files.

Syntax

SET_AS_DEFAULT="0"

DESKTOP_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will place shortcuts for installed applications on the desktop.

Syntax

DESKTOP_SHORTCUTS="0"

PROGRAMSMENU_SHORTCUTS

If this property is not specified, or is specified with a value of "1", then the installer will create a program menu group for installed applications and their components.

Syntax

PROGRAMSMENU_SHORTCUTS="0"

KEYDATA

This property specifies a registration key.

Syntax

KEYDATA=<registration key>

KEYFILE

This property specifies the UNC location of the license vault file <filename>.xcvault. See **here** 26 for further information.

Syntax

KEYFILE=<path to xcvault file>

NOUPDATER

If this property is not specified, or is specified with a value of "0", then the updater will be installed. If specified with a value of "1" then the updater will not be installed. (Available from build 310).

Syntax

NOUPDATER="0"

SCHEDULE UPDATER

If not specified, or specified with a value of "1", then the installer will create a **Windows Schedule Task** to check for updates once a fortnight.

Syntax

SCHEDULEUPDATER=<0>

EXE Installer Examples

- Install the application in quiet mode to the default install folder "C:\Program Files\Tracker Software":

  ```
  PDFXStd.exe / quiet
  ```

- Install the application in quiet mode to the default folder and specify the user license information and key as a vault file:

  ```
  PDFXStd.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c" KEYFILE="C:
  \license\V9Pro.xcvault"
  ```

- Install the application in quiet mode to the default folder. Specify the user license information and key as a string:

  ```
  PDFXStd.exe /quiet USERNAME="John Doe" USERMAIL="abc@a.b.c" KEYDATA="PVP60
  - ZJ2J77DN5kdBuQRhj ... dmGZ7VXrd6TkEJoJCz+1i2UTPSA5AvAU14Q="
  ```

2.4   Licensing

 Licensing

Since version 5.5 and build 308 **PDF-XChange** has moved to a new serial key licensing system. The new system offers both the standard serial key method of licensing our applications, as well as the option to use a license file. The license file is known as an **"XCVault"** file, which is a modified .zip file. The main benefit of this feature is that there is no longer a need to re-install the software if you are using an evaluation version and intend to upgrade. Follow the steps below to access and activate XCVault files:

1. Login to your account with **PDF-XChange.**

2. Move to the "**Your products and Serial numbers**" tab.

3. Move to the product for which you would like to download the XCVault file.

4. Click the arrow icon highlighted in *(figure 1)*. The window will expand as detailed below:
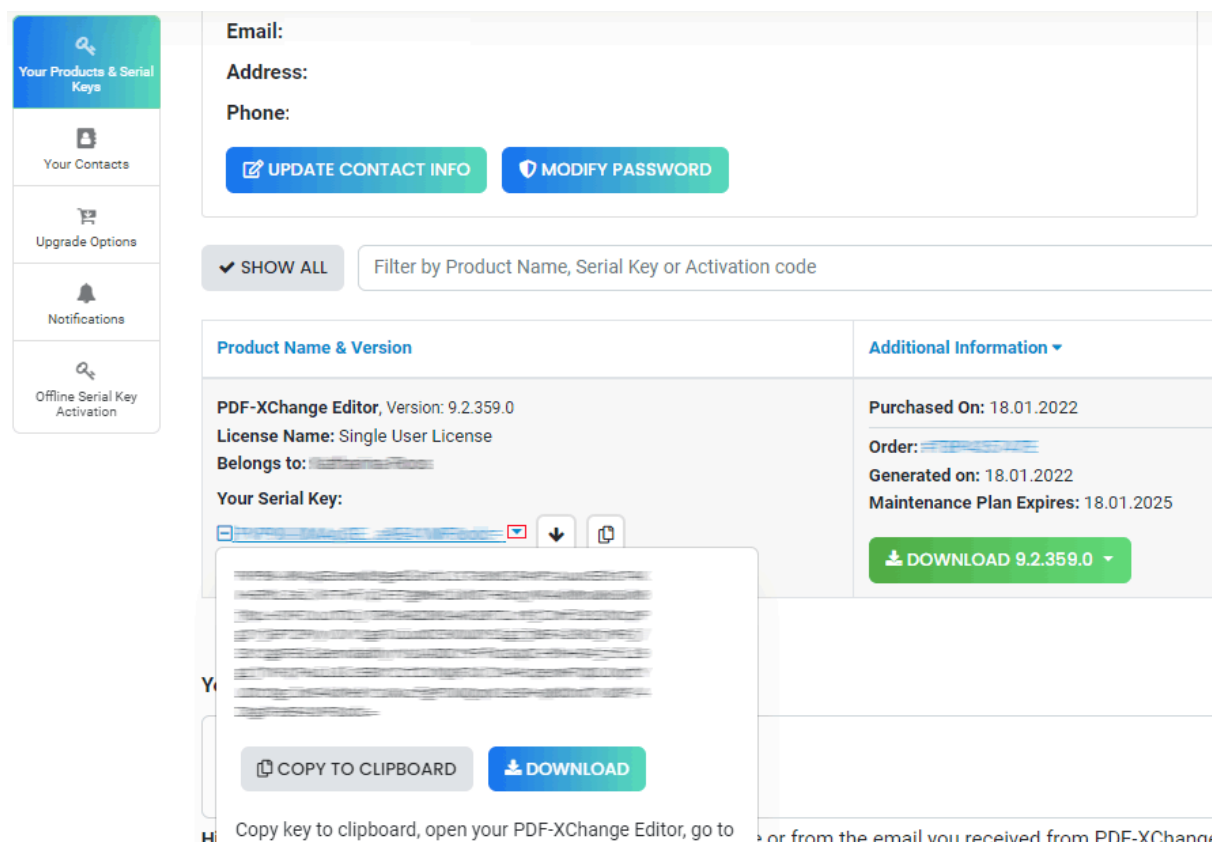
Figure 1. XCVault File Access Point

5. Click the **Download** button. The XCVault file will then download to the local computer.

6. Click the download icon to launch the XCVault file. All product licenses will then update.

System administrators should note that this information is stored within the **Windows Registry.** However, the method used to license the application can have an effect on the storage location. When an XCVault file is being used, its information is stored in two locations: **HKCU\Software\Tracker Software\Vault** and **HKLM\SOFTWARE\Tracker Software\Vault.** It should also be noted that license information is stored as a hexadecimal value. Therefore, if a registration key is being used to deploy the license, it is advisable to first license a single machine in order to create the first registration key.

Standard Deployment

Copy and paste serial keys into the installer to implement them during installation. Alternatively, click the **personal.xcvault** file after installation has taken place.

Silent Deployment

XCVault files can also be used for silent deployment of serial keys after installation has taken place. A windows command line can be used to push the XCVault file to each user that qualifies for a full

license. The command line for operation is: **XCVault.exe /Option <path_to_xcvault_file>.** Available command line options are detailed below:

<div align="center">

XCVault Command Line Options

</div>

/Install

This command designates the utility as the default handler of **.xcvault** files in the system. Please note that this requires administrative rights.

Example

```
xcvault.exe /Install
```

/AddKeys

This command installs all keys from **.xcvault** files.

Syntax

xcvault.exe [/AddKeys] <xcvault_file> [/M|/S|/R]

/M – specifies that new keys are added in the **HKEY_LOCAL_MACHINE** registry section and administrative rights are required.

/R – specifies that new keys will be unencrypted when added. Please note that this does not affect existing keys.

/S – specifies that the command is not permitted to show error/information messages.

Examples

```
xcvault.exe /AddKeys "c:\Personal.xcvault"
```

```
xcvault.exe "c:\Personal.xcvault"
```

/AddKeyData

This command installs the specified key.

Syntax

xcvault.exe [/AddKeyData] <keystring> [/M|/S|/R]

/M – Installs key into HKLM for per-machine use. This option requires administrative rights. If this option is not specified then key will be installed in HKCU for per-user use and administrative rights are not required.

/S – specifies that the command is not permitted to show error/information messages.

/R – specifies that new keys will be unencrypted when added. Please note that this does not affect existing keys.

Example

```
xcvault.exe /AddKeyData <keystring>
```

/OpenKeys

This command stores all keys in an open form, instead of encrypting them by machine-specific ID. This option is useful for terminal servers that have a load-balancing and/or VDI environment.

Syntax

xcvault.exe /OpenKeys [/M|/S]

/M – decrypts keys only in the per-machine store (HKLM). This option requires administrative rights. If it is not specified then the keys will be changed only in the per-user store (HKCU).

/S – specifies silent mode and suppresses any messages with information about results.

Example

```
xcvault.exe /OpenKeys
```

/ProtectKeys

This command is the opposite of the "OpenKeys" command:

Syntax

> **xcvault.exe /ProtectKeys [/M|/S]**

> **/M** – encrypts keys only in the per-machine store (HKLM). This option requires administrative rights. If it is not specified then the keys will be changed only in the per-user store (HKCU).

> **/S** – specifies silent mode and suppresses any messages with information about results.

Example

> `xcvault.exe /ProtectKeys`

/ActivateKeys

This command activates installed keys.

Syntax

> **xcvault.exe /ActivateKeys [/S|/AA]**

> **/S** – specifies silent mode and suppresses any messages with information about results.

> **/AA** – specifies that currently activated keys will be reused in the activation process.

Example

> `xcvault.exe /ActivateKeys`

/RemoveKeys

This command removes all license keys for all products from the per-user store (HKCU). If the per-machine store (HKLM) is available for modification then all keys will be removed from it, otherwise keys from this store will be marked as removed for only the current user.

Syntax

> **xcvault.exe /RemoveKeys [/S|**

/S – specifies silent mode and suppresses any messages with information about results.

Example

```
xcvault.exe /RemoveKeys
```

/Cleanup

This command removes all license-related information for all installed products from per-machine (HKLM) and per-user (HKCU) stores. If the per-machine store is not empty then administrative rights are required.

Syntax

xcvault.exe /Cleanup [/S|

/S – specifies silent mode and suppresses any messages with information about results.

Example

```
xcvault.exe /Cleanup
```

A sample script and associated literal path is detailed below:

C:\Program Files\Tracker Software\Vault>XCVault.exe /S with literal path **D: \Documents\Ref\Personal.xcvault**

Activating silent deployment is a two-step process. The first step is to call on the XCVault.exe that will apply the key. The second step is to specify the literal path to the personal.xcvault file. The presence of the script means that users are not notified of serial key deployment.

Passing License Details During Installation

The inclusion of XCVault files since version 5.5 and build 308 means that the command line install option **KEY=<regkey>** no longer passes license details to associated products. The command line can be used to resolve this issue and there are two methods available:

The first method is to use the option **KEYFILE=<xcvault file>** to specify the UNC location of the license vault file <filename>.xcvault. For example:

    KEYFILE="C:\Users\JohnDoe\Desktop\Personal.xcvault".

The second method is use the option **KEYDATA=<regkey>** to specify the registration key with a text string. For example:

    KEYDATA="PXP70-Y5EN....cFrBqnyKhv7eOw=".

The first method is recommended as the new keys are very complex and therefore less suited to being passed as strings at the command line. The details of these switches and examples of their use are available **here.** [17]

2.5   End User License Agreement

End User License Agreement

PDF-XChange® Versions 9.x EULA (End User License Agreement)

PDF-XChange® V9

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PDF-XChange is based in part on the Independent JPEG Group's work and uses the libjpeg-turbo library.

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Last amended date: March 30th, 2022.

2.6   The PDF-XChange Updater

The PDF-XChange Updater

The **PDF-XChange Updater** is used to check for and download updates to **PDF-XChange Standard.** Follow the steps below to access and edit updater settings:

1. Click the **Windows Start Button**.

2. Click **Control Panel.** The **Control Panel** dialog box will open.

3. Click **Devices and Printers** in the **Control Panel** dialog box.

4. Move to the **Printers** tab and right-click **PDF-XChange Lite.**

5. Click **Printing Preferences**. The **PDF-XChange Lite Printing Preferences** dialog box will open.

6. Click the **About** tab, then click **Check for Updates** in the **Help** dropdown menu to open the **PDF-XChange Updater:**
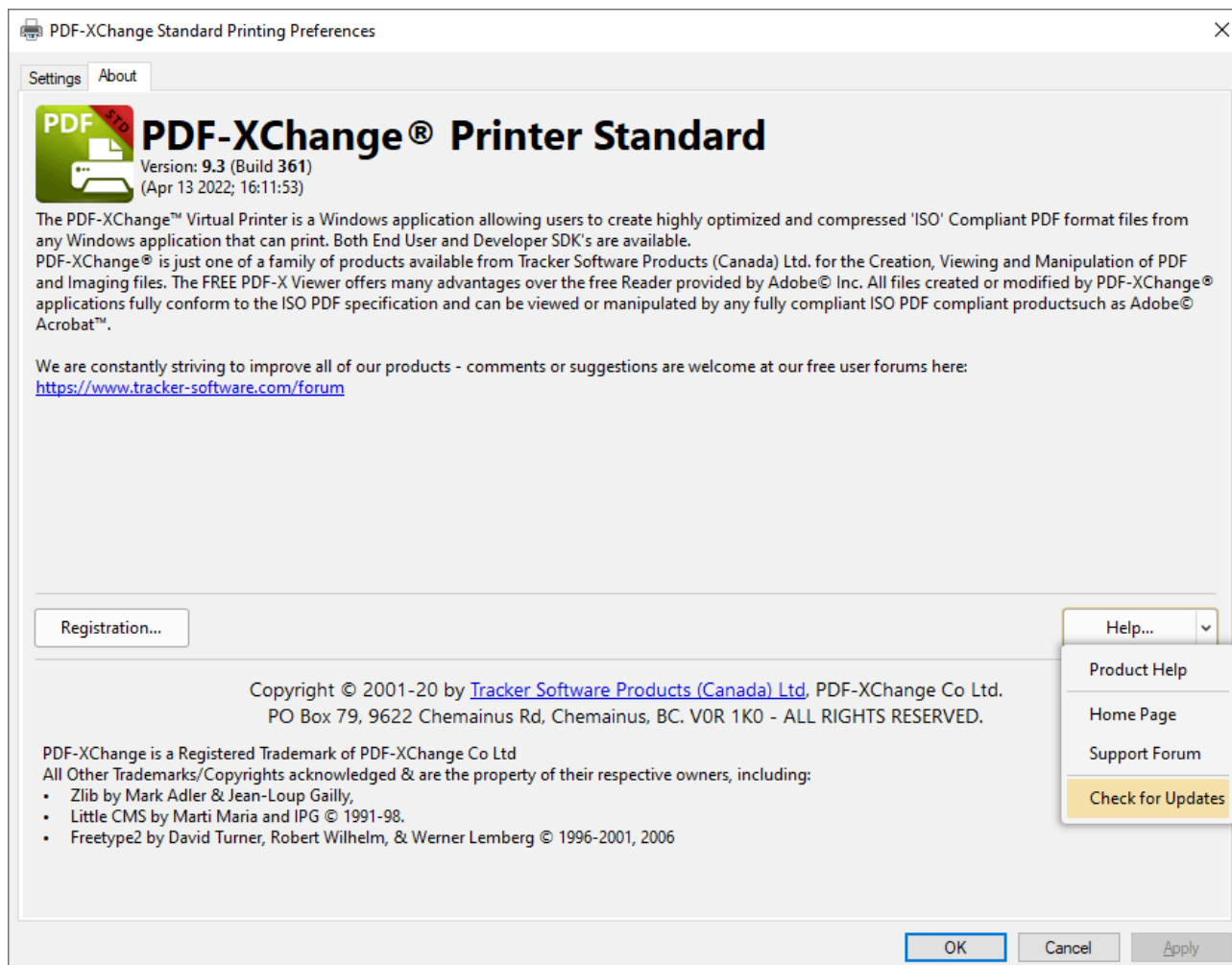
Figure 1. About Tab, Check for Updates

The **PDF-XChange Update** dialog box will open:
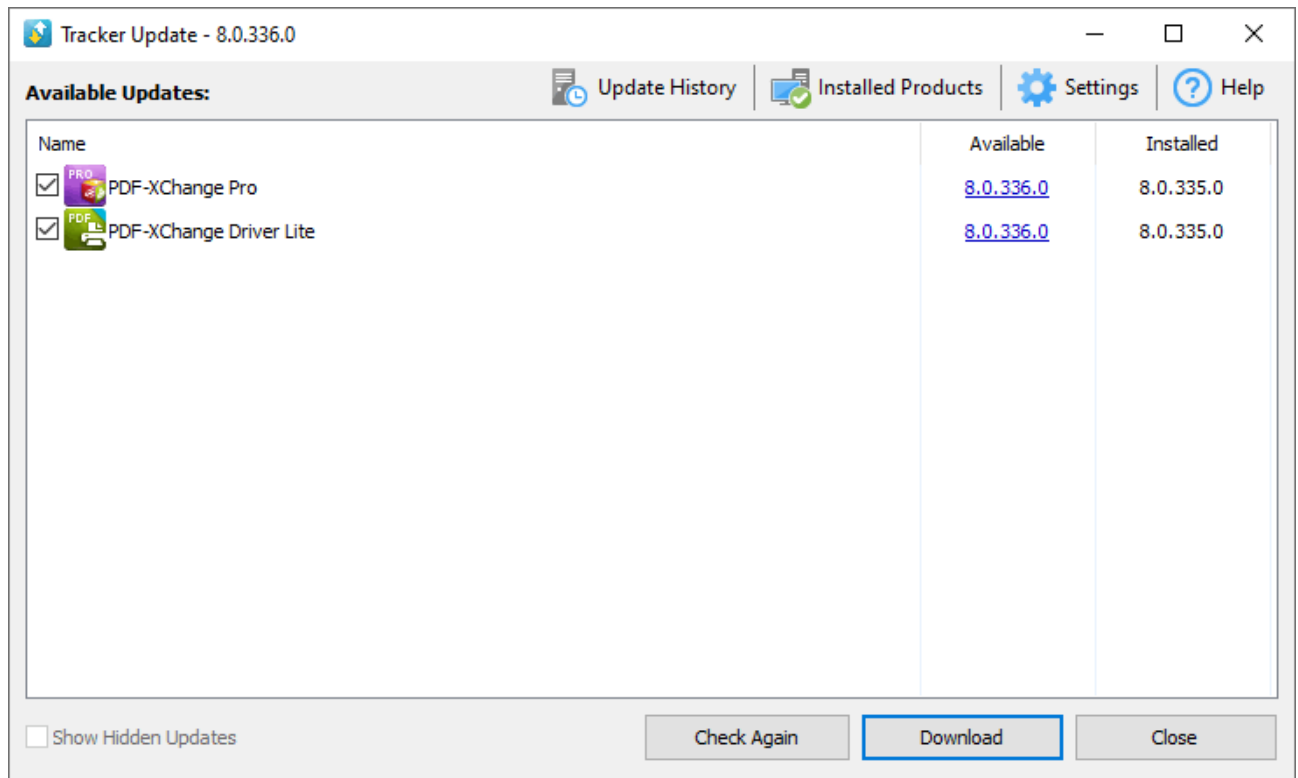
Figure 2. PDF-XChange Update Dialog Box

- Available updates are displayed in the main window. Click the **Download** button to download and install available updates.
- Click **Update History** to view a breakdown of recent updates.
- Click **Installed Products** to view a breakdown of installed products from **PDF-XChange.**
- Click **Settings** to customize settings for the **PDF-XChange Updater.** These options are detailed beneath *(figure 3)* below.
- Click **Help** to launch the online help for the **PDF-XChange Updater.**
- Select/clear the **Show Hidden Updates** box to show/hide hidden updates.
- Click **Check Again** to check for more recent updates.
- Click **Close** to close the **PDF-XChange Update** dialog box.

Settings
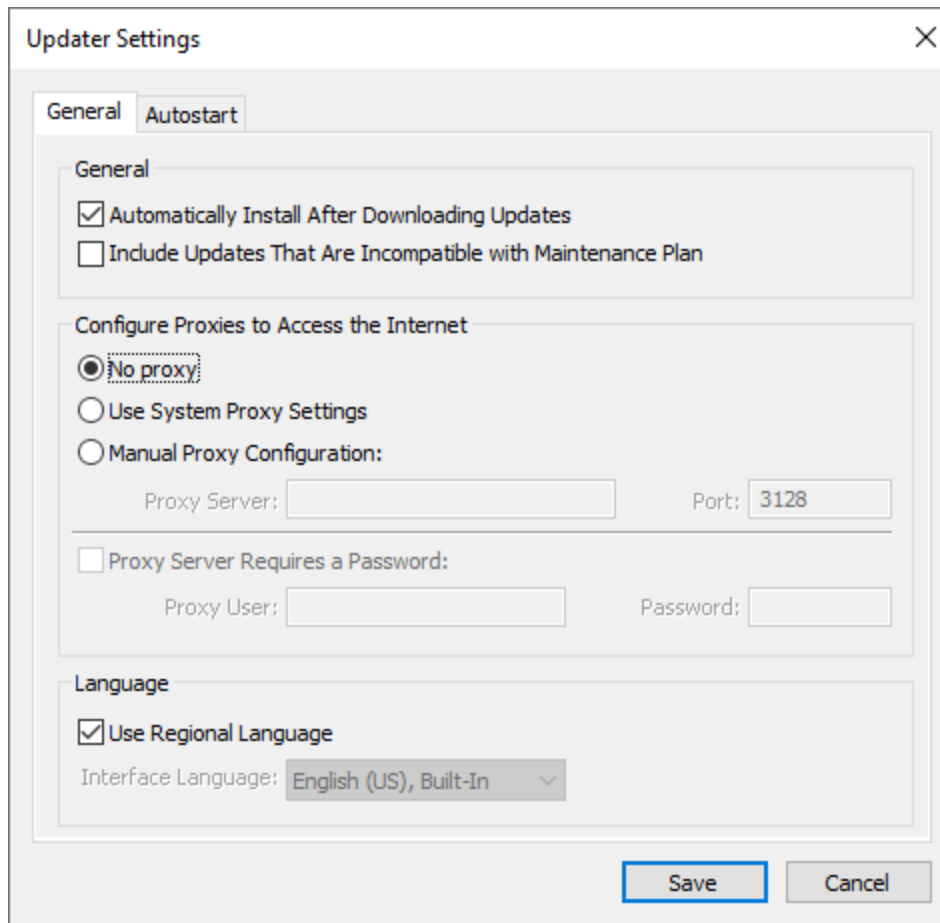
Figure 3. Updater Settings Dialog Box

- Select/clear the **Automatically Install After Downloading Updates** box to enable/disable the automatic installation of downloaded updates.
- Select/clear the **Include Updates That Are Incompatible with Maintenance Plan** box to include/exclude products that are not included in your current maintenance plan. Note that if updates are listed here and your license has expired, then the software will revert to evaluation mode when the updates are downloaded.
- Select an option in the **Configure Proxies to Access the Internet** section to determine the proxy that the updater uses to access the internet:
  - Select **No Proxy** to disable the use of a proxy to access the internet.
  - Select **Use System Proxy Settings** to use the current system proxy settings to access the internet.
  - Select **Manual Proxy Configuration** to use a custom proxy, then enter the **Proxy Server** and **Port** number details in the text boxes.
- Select the **Proxy Server Requires a Password** box to set a password for the use of **Proxy Server** when the **Manual Proxy Server** option above is used, then enter the **Proxy User** and **Password** details in the text boxes.

- Select the **Use Regional Language** box to use the regional language as the interface language for downloaded updates, or select a different option from the dropdown menu. Note that the language of the user interface can be subsequently changed as desired in the user preferences.
- Click **Save** to save settings.

Autostart

Use the **Autostart** tab to set a schedule for automatically checking for updates to the software:
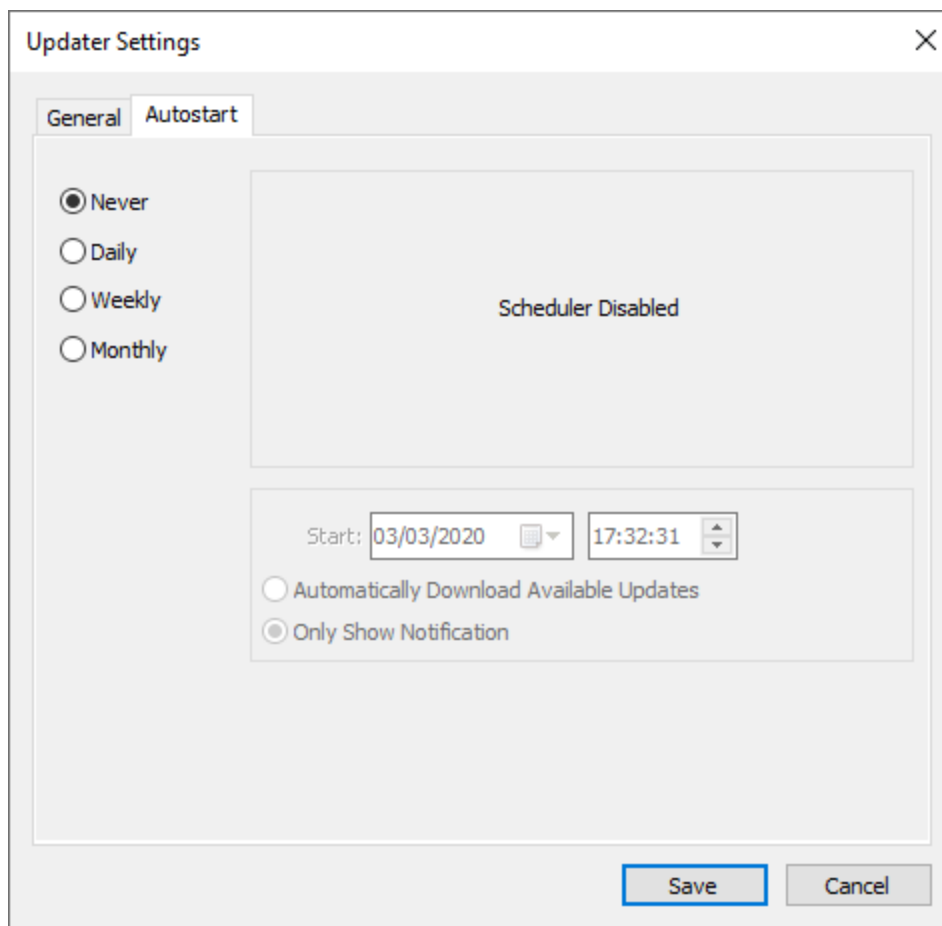
Figure 4. Updater Settings Dialog Box, Autostart Tab

- Select **Never** to disable this feature.
- Select **Daily, Weekly** or **Monthly** to check for updates automatically on a daily, weekly or monthly basis as desired. Note that different scheduling options are available depending on which option is used.
- Use the **Start** text box to determine the date and time at which the schedule starts.
- Select **Automatically Download Available Updates** to download available updates automatically, or select **Only Show Notification** to receive a notification that updates are available instead.

Click **Save** to save settings.

3   **PDF-XChange Standard V9 User Manual**

 PDF-XChange Standard V9 User Manual

The **PDF-XChange Standard V9** package includes **MS Office** integration. This provides additional and dynamic functions, such as the preservation of interactive table of contents elements in converted documents and embedded URL support from toolbar/ribbon icons directly within most **MS Office** applications.

The **OFFice2PDF** batch convertor facilitates the conversion of multiple files to PDF from supported formats such as **(*.doc), (*.xls), (*.rtf), (*.html)** and **(*.txt).**

3.1　　Features Overview

Features Overview

PDF-XChange Standard is one of the most feature-rich virtual printers available worldwide. It combines high quality conversion with optimized compression to create professional documents that are comparatively small in size. The main features of **PDF-XChange Standard** are detailed below:

- **AES Encryption** to enhance security options.
- **Booklet Mode** enables the printing of booklets and similar documents.
- **Bookmarks** functionality for converted files.
- **Compression Options** that provide settings and standards for images and text.
- **Conversion** of colored images to grayscale/monochrome to enhance compression and reduce file size.
- **Customzied Printing Profiles** that enable the saving of personalized settings for subsequent use.
- **Digital Signing** of documents to demonstrate authenticity.
- **Document Information** options that support basic and advanced settings, including the option to add **XMP Metadata.**
- **DPI Reduction** to reduce file size.
- **Font Embedding** to ensure compatibility on all computers. Chinese, Japanese and Korean fonts are available.
- **Enhanced Saving** options that determine how files are saved/named. **Macros** 70 have been introduced to increase workflow efficiency.
- **Headers and Footers** can be in inserted into converted files.
- **Hybrid Conversion Engine** that prints to both **GDI** and **XPS.**
- **Language** options that support a wide range of languages.
- **MAPI** and **SMTP** options for emailing files, including .zip compression functionality.
- **MRC (Mixed Raster Content)** support.
- **MS Office** toolbar add-in that installs automatically and creates a tab in **MS Office** programs on your computer.
- **n-UP** printing options enable the rescalding and/or resizing of pages, and the placement of multiple pages on each printed sheet.

- The **Office2PDF** [188] feature enables the batch-conversion of files and the use of 'watched directories' that enable the auto-conversion of specified folders/files to PDF.
- **Overlay** options that enable the use of PDF pages as overlays.
- **Paper Properties** that provide options for paper size, resolution, scaling and output.
- **PDF/A: 1a, 1b+2a, 2b** and **2u (RGB)** are supported as conversion options.
- **Security** options that determine document and password permissions.
- **Tool Tips** are visible when the pointed is hovered over functions/properties.
- **URL** and **Email Links** can be added when files are converted.
- **Watermarks** can be added to documents in text/graphic format.

3.2　　PDF-XChange Standard Printer Settings

PDF-XChange Standard Printer Settings

Follow the steps below to view/edit printer settings in **PDF-XChange Standard:**

　　1. Enter 'printers & scanners' in the **Windows Search Box,** then click **Printers &
　　scanners** in the search results:
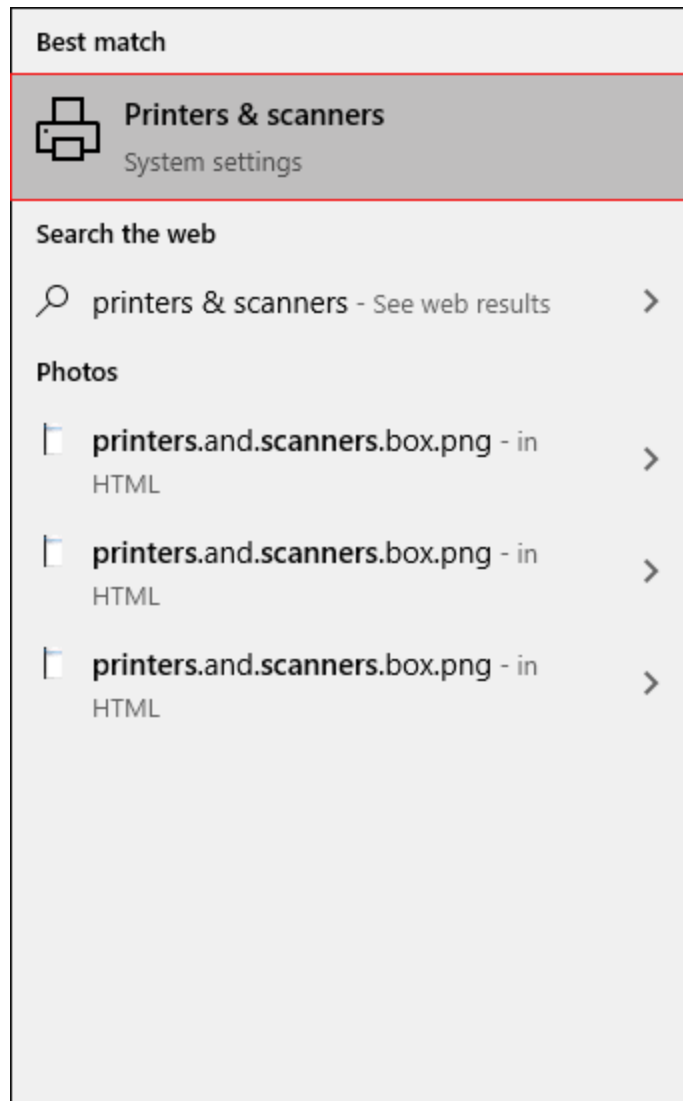
Figure 1. Windows Search Box Results

The **Printers & scanners** tab will open.

2. Click **PDF-XChange Standard,** then click **Manage:**
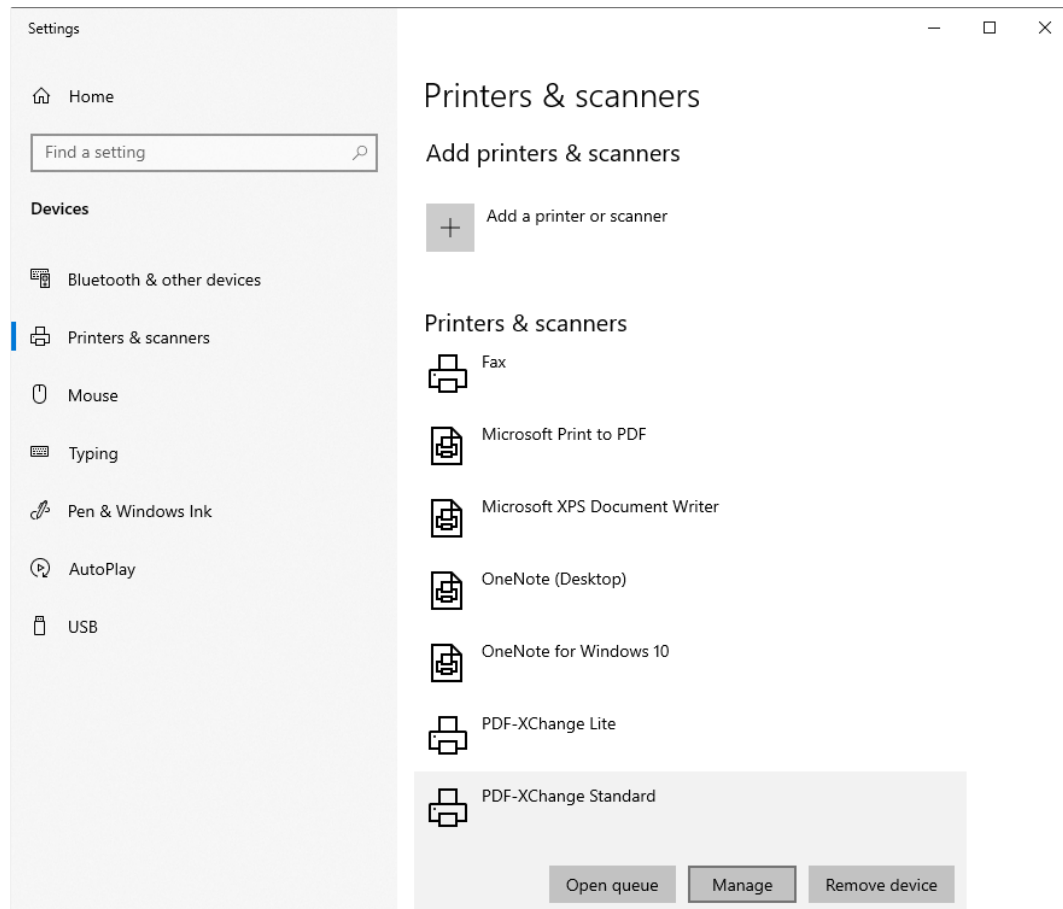
Figure 2. Printers & scanners Tab

The **PDF-XChange Standard** tab will open.

3. Click **Printing Preferences:**
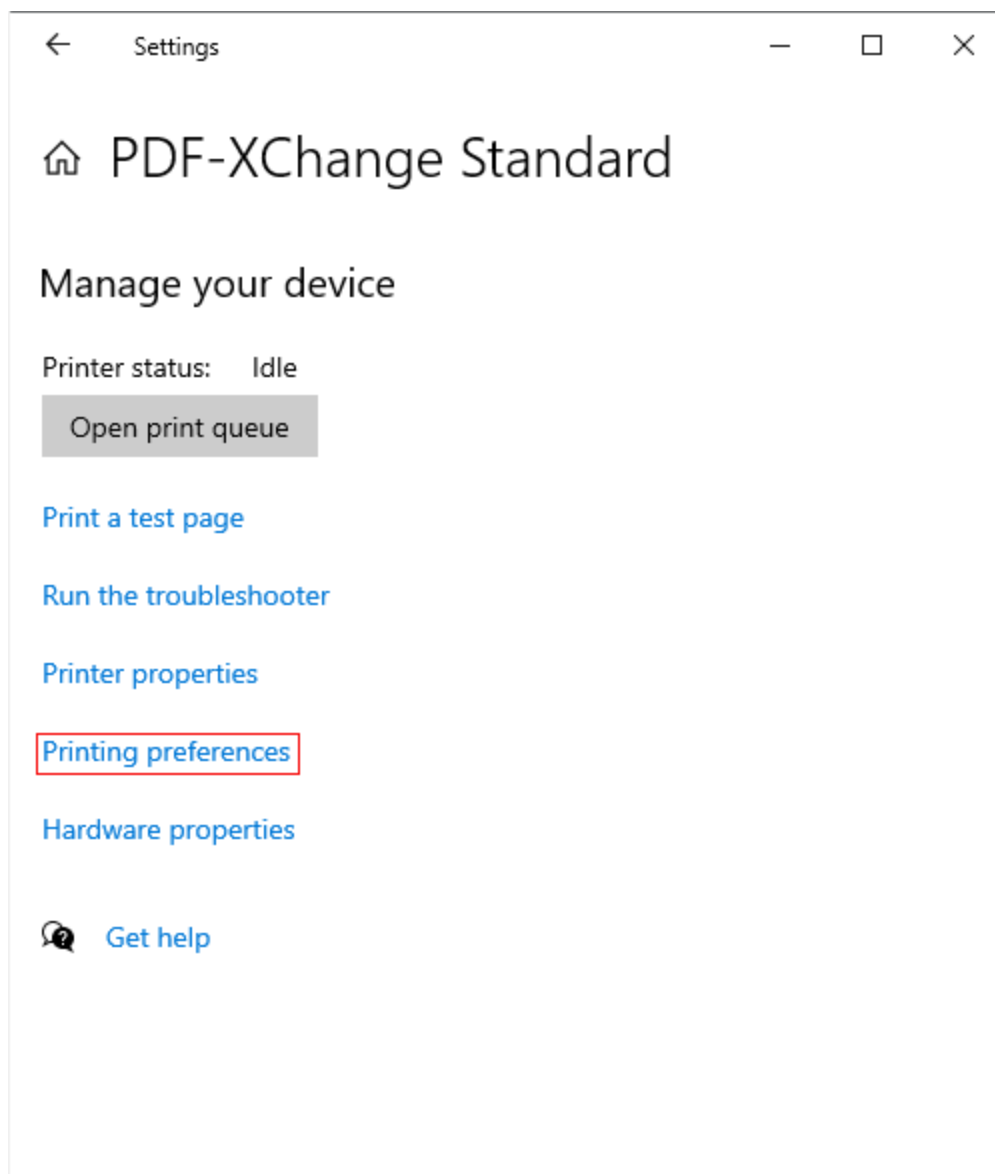
Figure 3. PDF-XChange Standard Tab, Printing Preferences

The **PDF-XChange Standard Printing Preferences** dialog box will open. These settings are used to determine all options in **PDF-XChange Standard:**
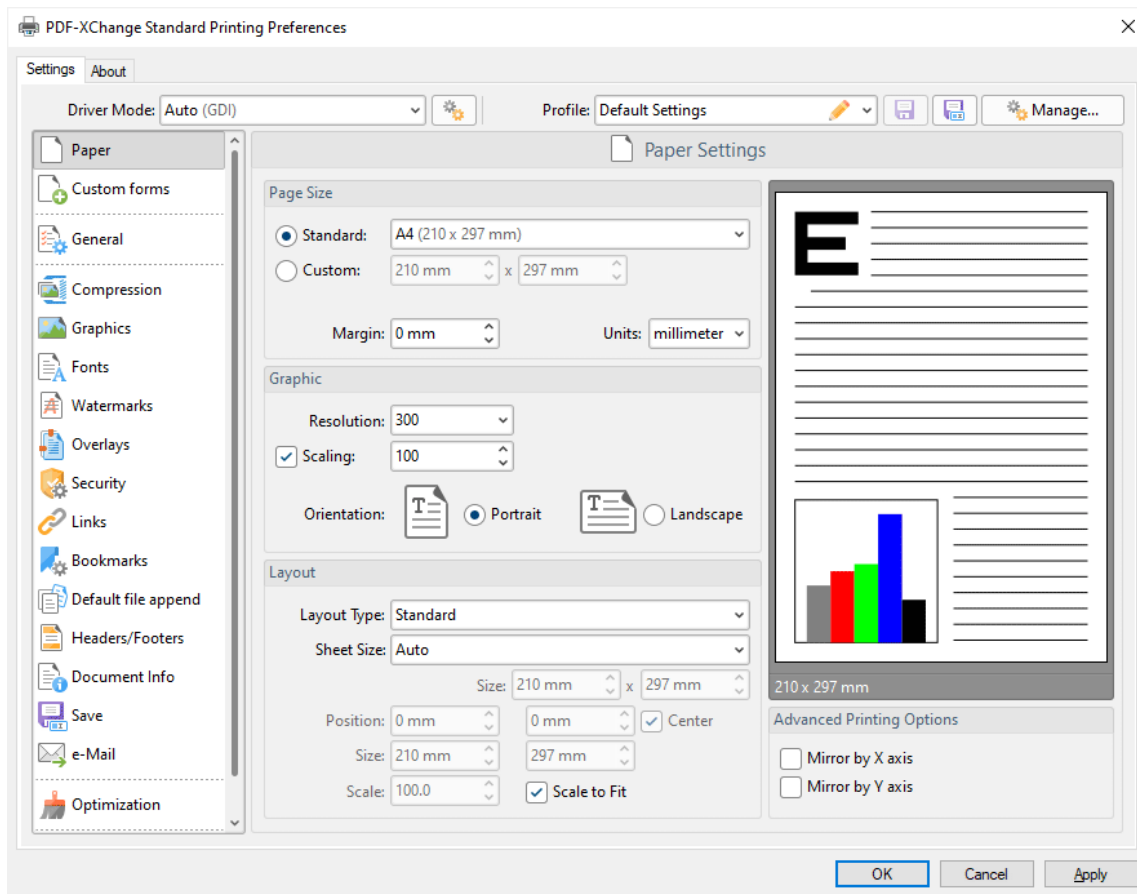
Figure 4. PDF-XChange Standard Printing Preferences Dialog Box

4. Click options in the list of settings on the left to view/edit settings for the **PDF-XChange Standard** printer. All settings are listed below:

- **Paper** [113]
- **Custom Forms** [122]
- **General** [125]
- **Compression** [129]
- **Graphics** [131]
- **Fonts** [133]
- **Watermarks** [135]
- **Overlays** [139]
- **Security** [141]
- **Links** [147]
- **Bookmarks** [149]
- **Default File Append** [151]
- **Headers and Footers** [153]
- **Document Info** [156]
- **Save** [158]

- **Email** [160]
- **Optimization** [162]
- **Languages** [165]

About

The **About** tab can be used to access further information about the product view help pages, check for updates and register new serial keys/activation codes.

3.2.1   **Profiles**

Profiles

The **Profile** section is used to save customized printer settings for subsequent use:
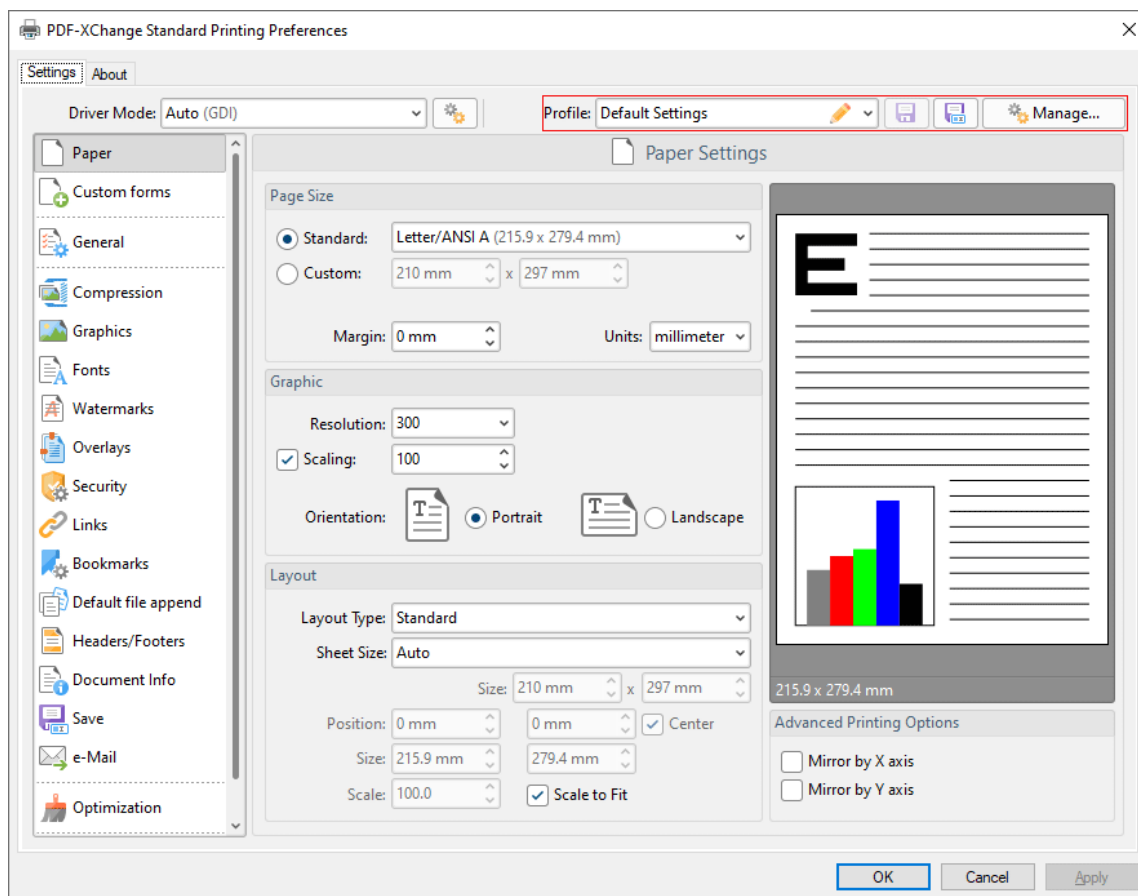
Figure 1. PDF-XChange Standard Printing Preferences Dialog Box. Profile Options Highlighted

Click the disk icon to open the **Add Profile** dialog box and saved customized settings:
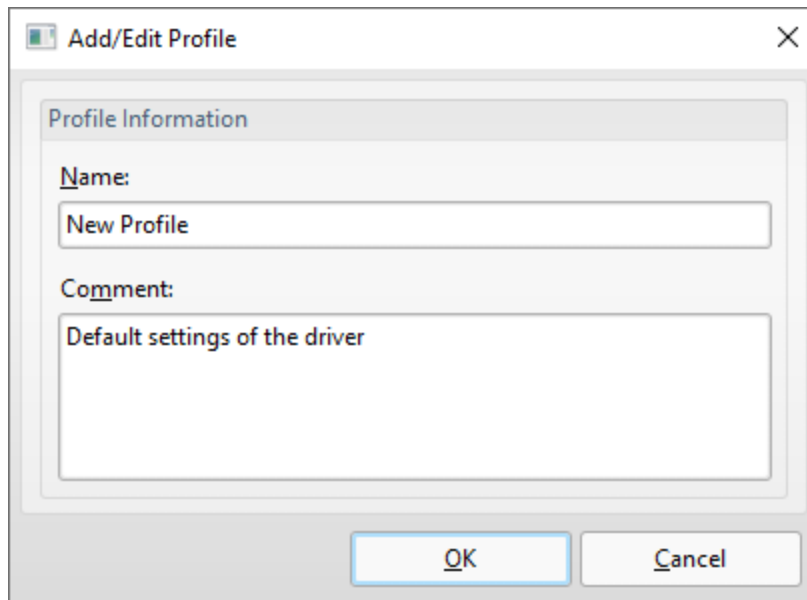
Figure 2. Add/Edit Profile Dialog box

- Use the **Name** text box to enter a name for the profile.
- Use the **Comment** text box to add a description of the profile.
- Click **OK** to save profiles. They will then be available in the **Profile** submenu highlighted in *(figure 1).*
- Click the **Manage** button in *(figure 1)* to manage saved profiles. The **Profiles Manager** dialog box will open:
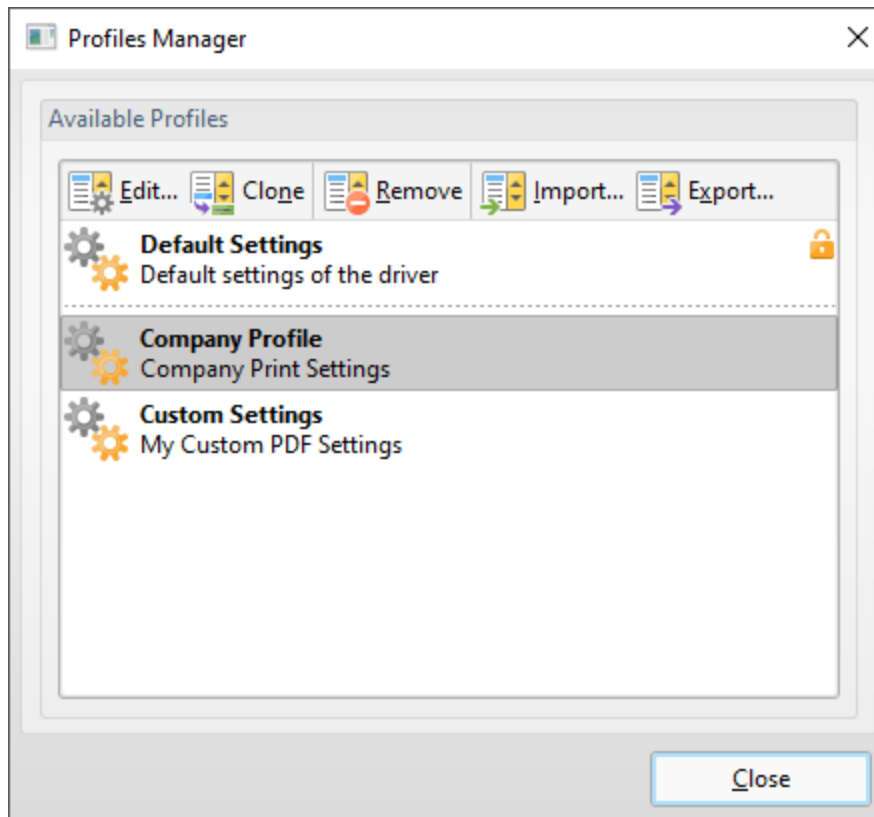
Figure 3. Profiles Manager Dialog Box

- Click **Edit** to edit selected profiles. The **Edit Profile** dialog box will open. Edit the **Name** and **Comment** of the profile and click **OK** to save changes.
- Click **Clone** to clone selected profiles. This option enables the duplication and editing of profile settings without changing the original profile. The cloned profile will appear in the list of profiles and can then be edited as desired.
- Click **Remove** to remove selected profiles.
- Click **Export** to export selected profiles. Exported profiles save as **(*.pxppp)** files that can be uploaded to other installations of **PDF-XChange Standard** via the **Import** feature detailed below.
- Click **Import** to import settings that the **Export** feature has been used to export. Alternatively, **rundll32** can be used to install profiles, as detailed below. Further information on **rundll32** is available **here.**

RUNDLL32 OPTION

There is also a **rundll32** option for profiles:

rundll32 "C:\Program Files\Tracker Software\PDF-XChange Standard\drvui.x64.dll",DUI30_Command [/InstallProfile:"<fullpathtoprofile>" | /SetDefProfile:"<profile_name>"] [/PrinterName:"PDF-XChange Standard"] [/AsDefault] [/ForUser]

Note that the **drvui.x64.dll,** as detailed above, should be used for 64-bit systems. If a 32-bit system is being used, then the **drvui.x86.dll** should be used instead.

Use the **Export** feature detailed in *(figure 3)* to export profiles for use in conjunction with the **rundll32** option.

The **rundll32** contains the following parameters:

- **/InstallProfile:"<fullpathtoprofile>"** installs a profile from the path specified. If **/AsDefault** is specified then the profile will be set as the default profile.
- **/AsDefault** sets the new profile as the default profile.
- **/SetDefProfile:"<profile_name>"** sets the specified profile as the default profile. For example: **/SetDefProfile:"Current".**
- **/PrinterName** specifies the printer to which changes are made. If no printer is specified then the default printer is used.
- **/ForUser** changes the profile for only the current user. If this parameter is not specified then the profile is changed for all users.

Example

The following command line installs an exported profile to the printer **'PDF-XChange Standard':**

C:\Program Files\Tracker Software\PDF-XChange Standard\drvui.x64.dll",DUI30_Command /InstallProfile:"C:<path to profile>\ProfileName.pxpp" /PrinterName:"PDF-XChange Standard"

3.2.2   **Driver Mode**

 Driver Mode

The **Driver Mode** determines the print mode of **PDF-XChange Standard:**
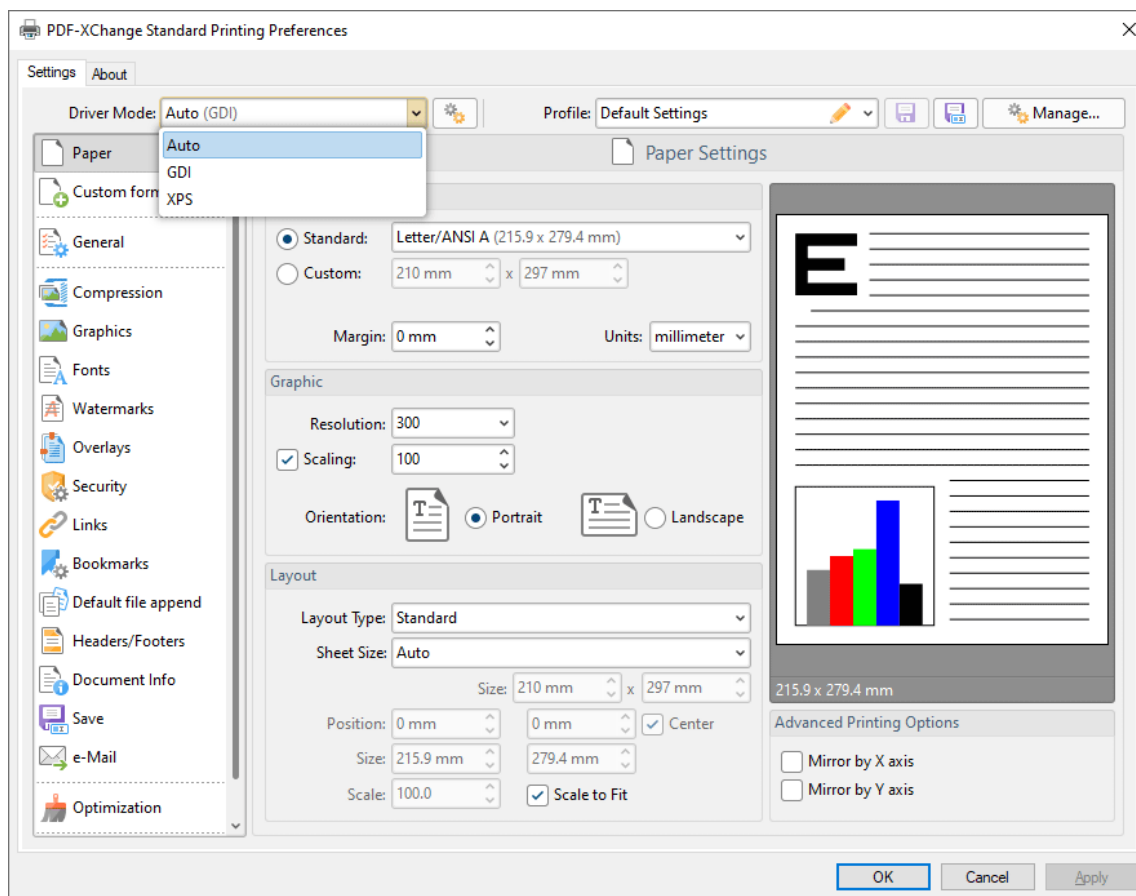
Figure 1. Driver Mode Options

Printer drivers on **Microsoft Windows** systems make use of **GDI (Unidrv** or **P-Script-based)** or **XPS (XPSDrv)** in order to print documents. **PDF-XChange Standard** supports both of these modes, and the **Driver Mode** settings determine which mode is used:

- **Auto** allows **PDF-XChange Standard** to determine the print mode.
- **GDI** specifies **GDI** printing to **GDI.**

- **XPS** specifies **XPS** printing to **XPS.**

Driver Mode Rules

The driver mode rules are used to set printing to **GDI** or **XPS** for specific applications. Click the icon next to the **Driver Mode** dropdown menu in order to specify driver mode rules:
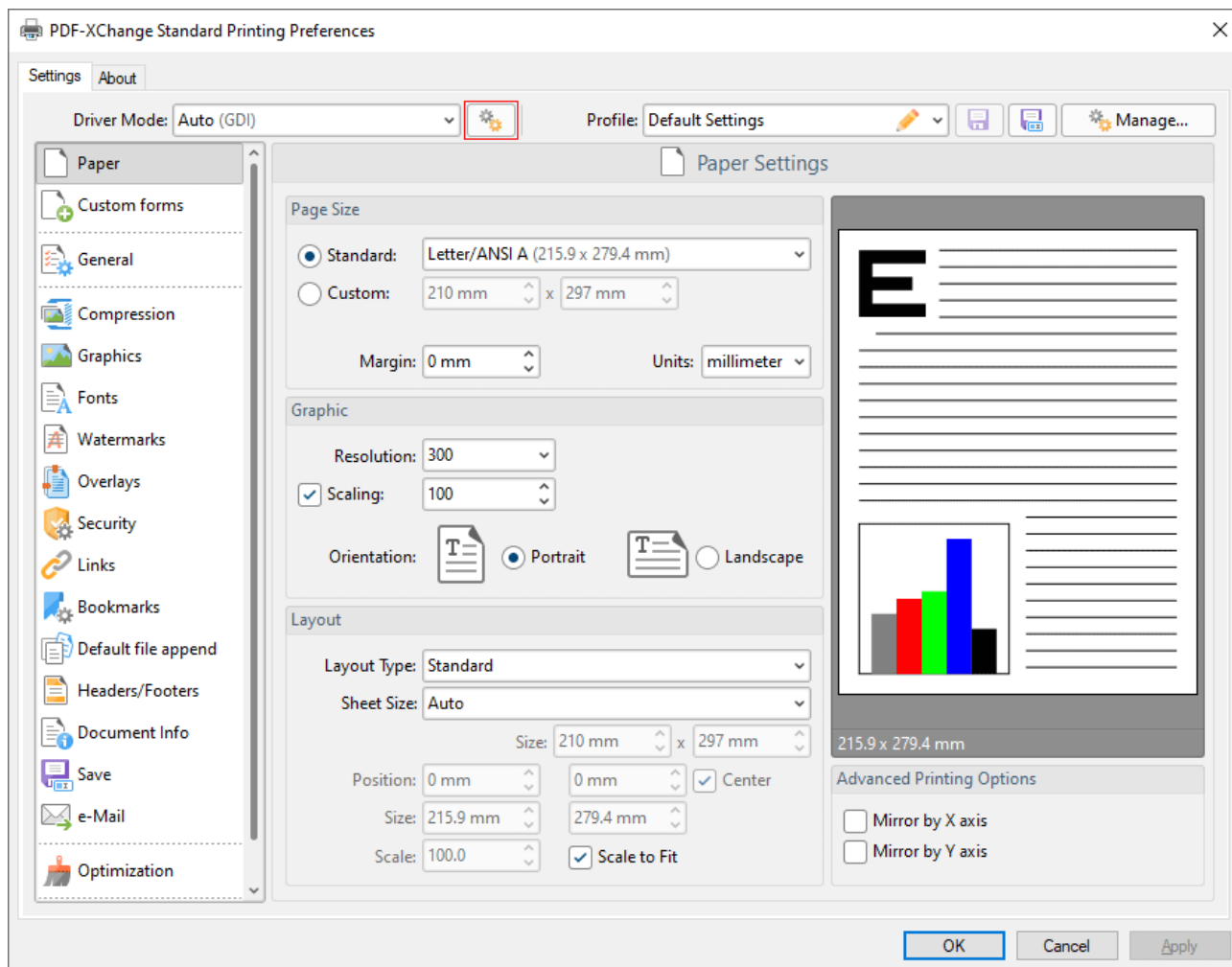
Figure 2. Driver Mode Rules Icon

The **Driver Mode Rules** dialog box will open:
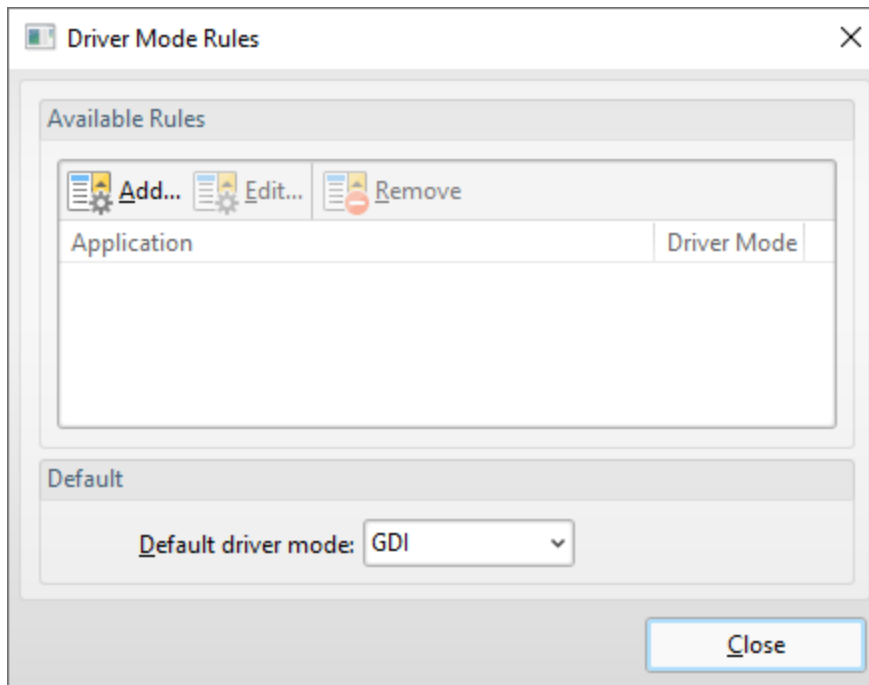
Figure 3. Driver Mode Rules Dialog Box

- Click **Add** to add applications to the list. The **Add/Edit Driver Mode** dialog box will open, as detailed below.
- Click **Edit/Remove** to edit/remove selected applications. The **Add/Edit Driver Mode** dialog box will open, as detailed below.
- Use the **Default driver mode** dropdown menu to determine the default driver mode in **PDF-XChange Lite.**
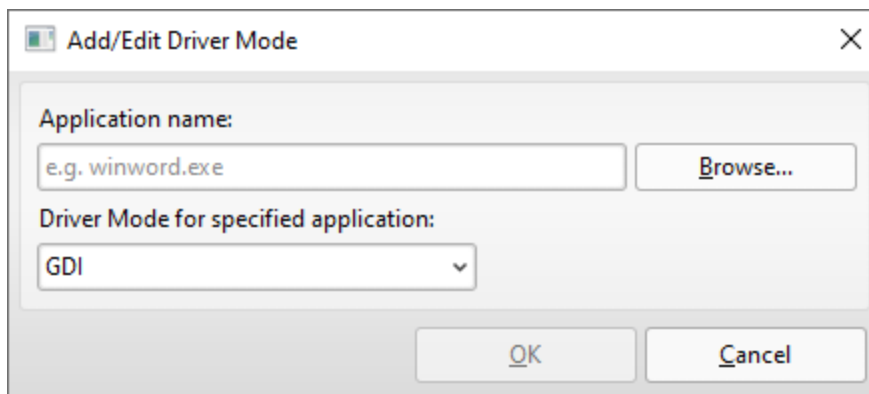
Figure 4. Add/Edit Driver Mode Dialog Box

- Enter the name of the application in the **Application name** text box. Note that the executable file of the application must be used. Alternatively, click **Browse** to select an application manually.
- Use the dropdown menu to determine the **Driver Mode** for the specified application. **PDF-XChange Lite** will then print in the specified mode when this application is used.

Click **OK** to save changes.

3.2.3 **Macros**

 Macros

Macros are used throughout **PDF-XChange Standard.** 'Macro' is an abbreviation of 'macroinstruction' - a term in computer science for a rule that specifies how input characters should be entered to create corresponding output. This means that components of the output process can be simplified during the input process, which makes the work involved less intensive and more dynamic. Multiple macros can be used simultaneously as desired.

Please note that certain symbols are not compatible with macros and therefore are not permitted in document names. If inconsistencies are noticed between the name used when files are saved and the final file name then it is advised to change the name used when files are saved.

The format for macros is:

%[<Macro Name>] or, when it is customizable: **%[<Macro Name>:<Parameter>]**. The **<Parameter>** step is optional in all cases except for the **Environment Variable** macro.

For example, the **Page Number** macro can be used to specify the page numbering format. The syntax for the **Page Number** macro is **%[Page:<Parameter>]** and the following parameters are available:

- **'r'** specifies the use of lower-case roman numerals - **%[Page:r].**
- **'R'** specifies the use of upper-case roman numerals - **%[Page:R].**
- **'L'** specifies page labels as the page numbering format in cases where page labels have been specified. If page labels have not been specified then standard page numbers are used - **%[Page:L].**
- **'<integer>** specifies the minimum number of digits used. This value can be any positive integer from 1 to 12 - for example **%[Page:4]** starts the numbering as **"0001, 0002, 0003...".**

When macros are available the macro icon is displayed:
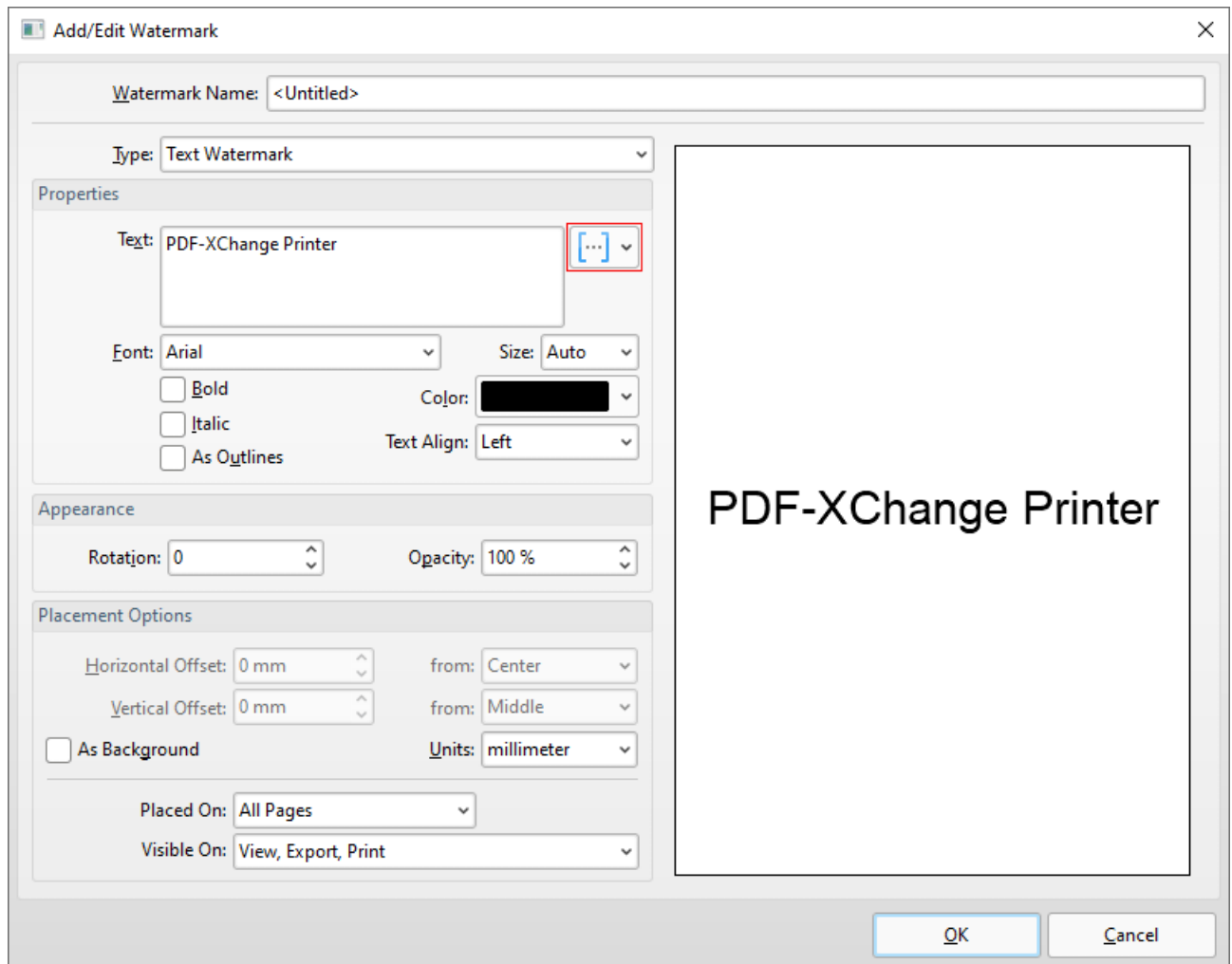
Figure 1. Macro Icon

Click the macro icon to view a list of available options, then click to add macros to the associated text box. All macros are detailed below:

- **Application Name** [73]
- **Computer Name** [77]
- **Date and Time Macros** [81]
- **Document Name** [85]
- **Document Path** [90]
- **Environment Variable** [95]
- **Page Number** [104]
- **Pages Count** [100]
- **User Name** [109]

Further information about macros is available **here.**

3.2.3.1   Application Name

Application Name

The **Application Name** macro adds the executable filename of the application that calls **PDF-XChange Standard** to print documents.

The syntax for this macro is **%[AppName]**

Example

Follow the steps below to use the **Application Name** macro to create a watermark:
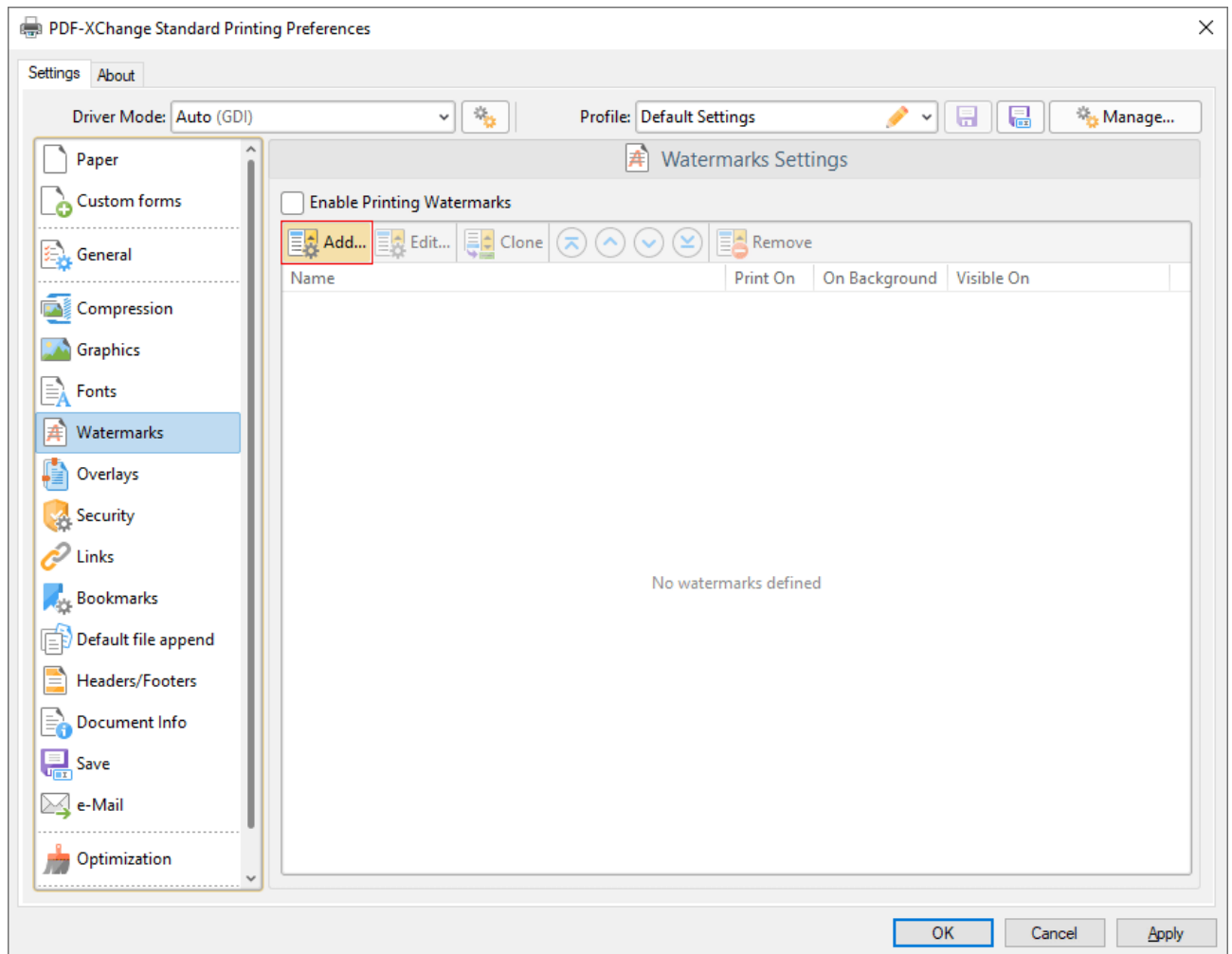
    1. Click **Watermarks** in the settings menu, then click **Add:**

Figure 1. Watermarks Settings Dialog Box, Add Watermark Button Highlighted

The **Add/Edit Watermark** dialog box will open.

2. Clear the **Text** text box, then click the macro icon and click **Application Name** in the dropdown menu:
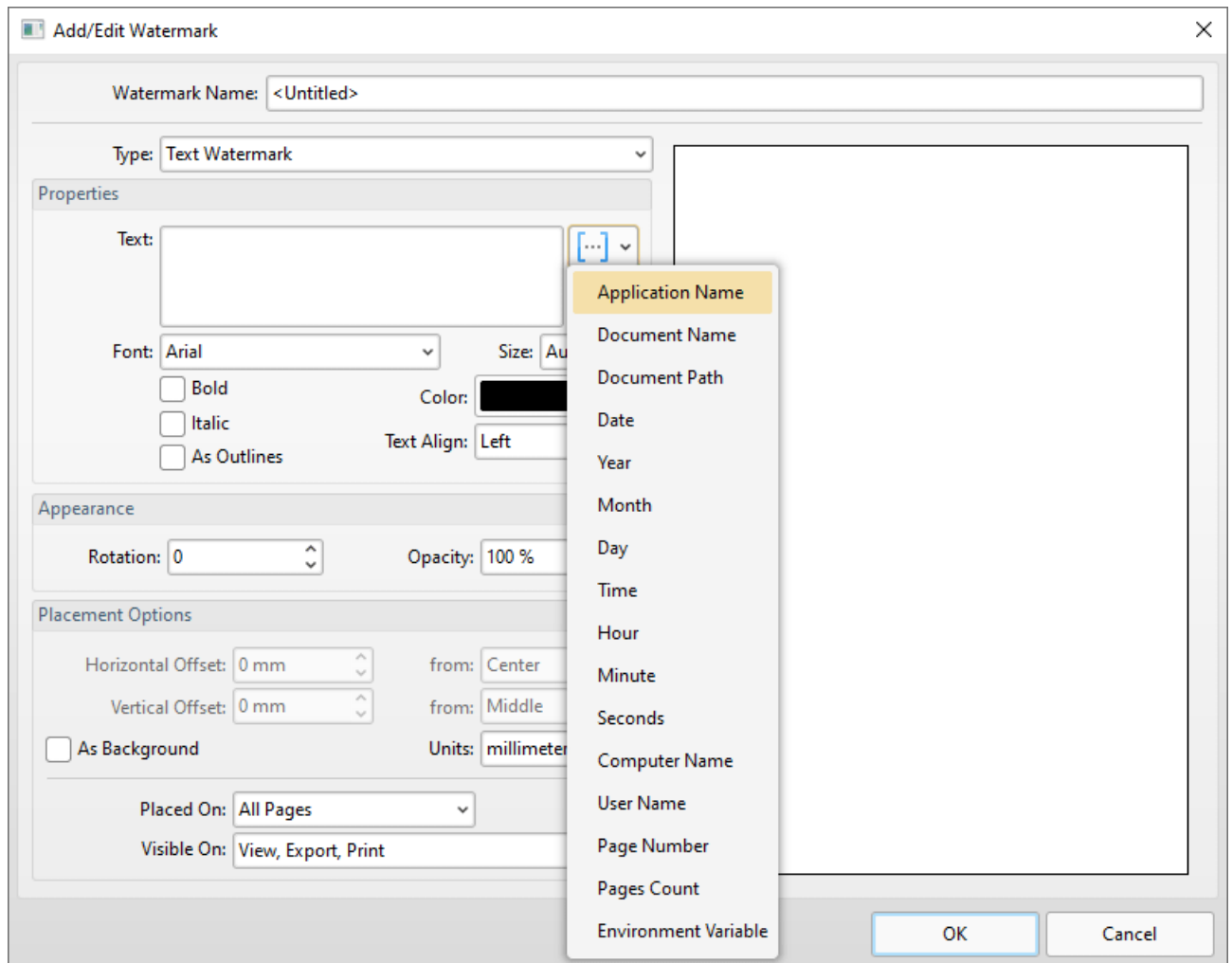
Figure 2. Add/Edit Watermark Dialog Box, Application Name Macro Selected

The **%[AppName]** macro is then added to the text box, and the watermark text updates to the name of the application that calls **PDF-XChange Standard** to print documents. For example, if **Microsoft Word** is used then **'WINWORD'** is added:
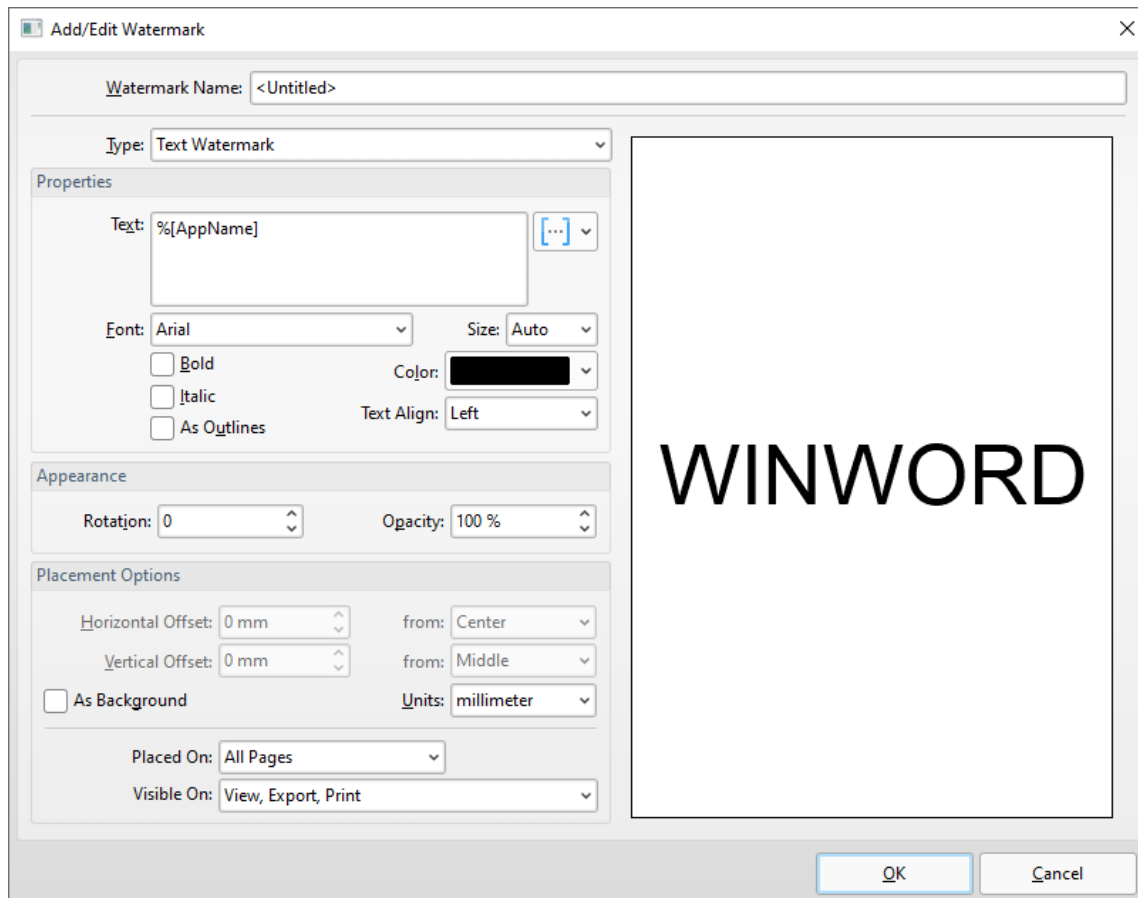
Figure 3. Add/Edit Watermark Dialog Box, %[AppName] Macro Example

3.2.3.2   Computer Name

Computer Name

The **Computer Name** macro adds the name of the local computer as defined by the **Windows Computer Name.**

The syntax for this macro is **%[Computer]**

Example

Follow the steps below to use the **Computer Name** macro to create a watermark:

1. Click **Watermarks** in the settings menu, then click **Add:**

Figure 1. Watermarks Settings Dialog Box, Add Watermark Button Highlighted

The **Add/Edit Watermark** dialog box will open.

2. Clear the **Text** text box, then click the macro icon and click **Computer Name** in the dropdown menu:
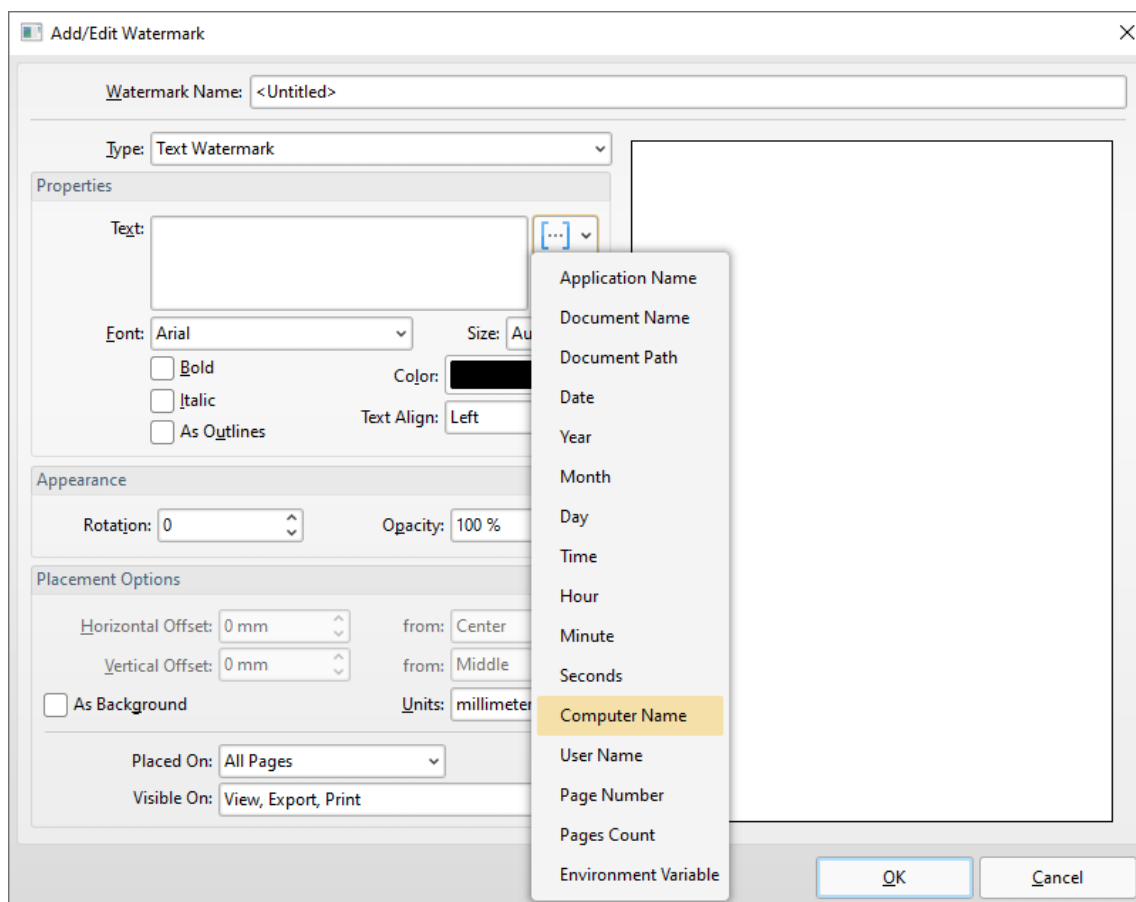
Figure 2. Add/Edit Watermark Dialog Box, Computer Name Macro Selected

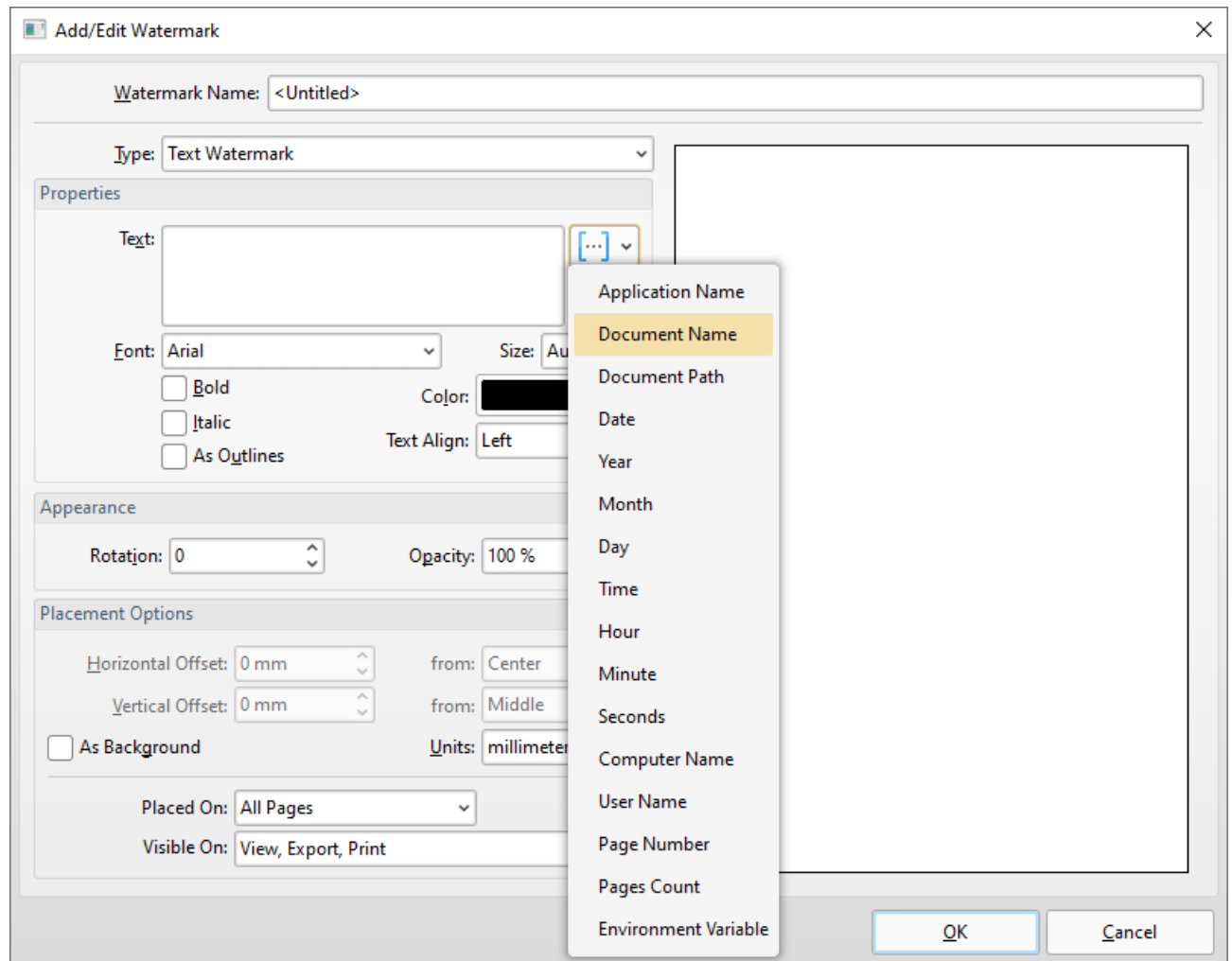The **%[Computer Name]** macro is then added to the text box, and the watermark text updates to name of the local computer:
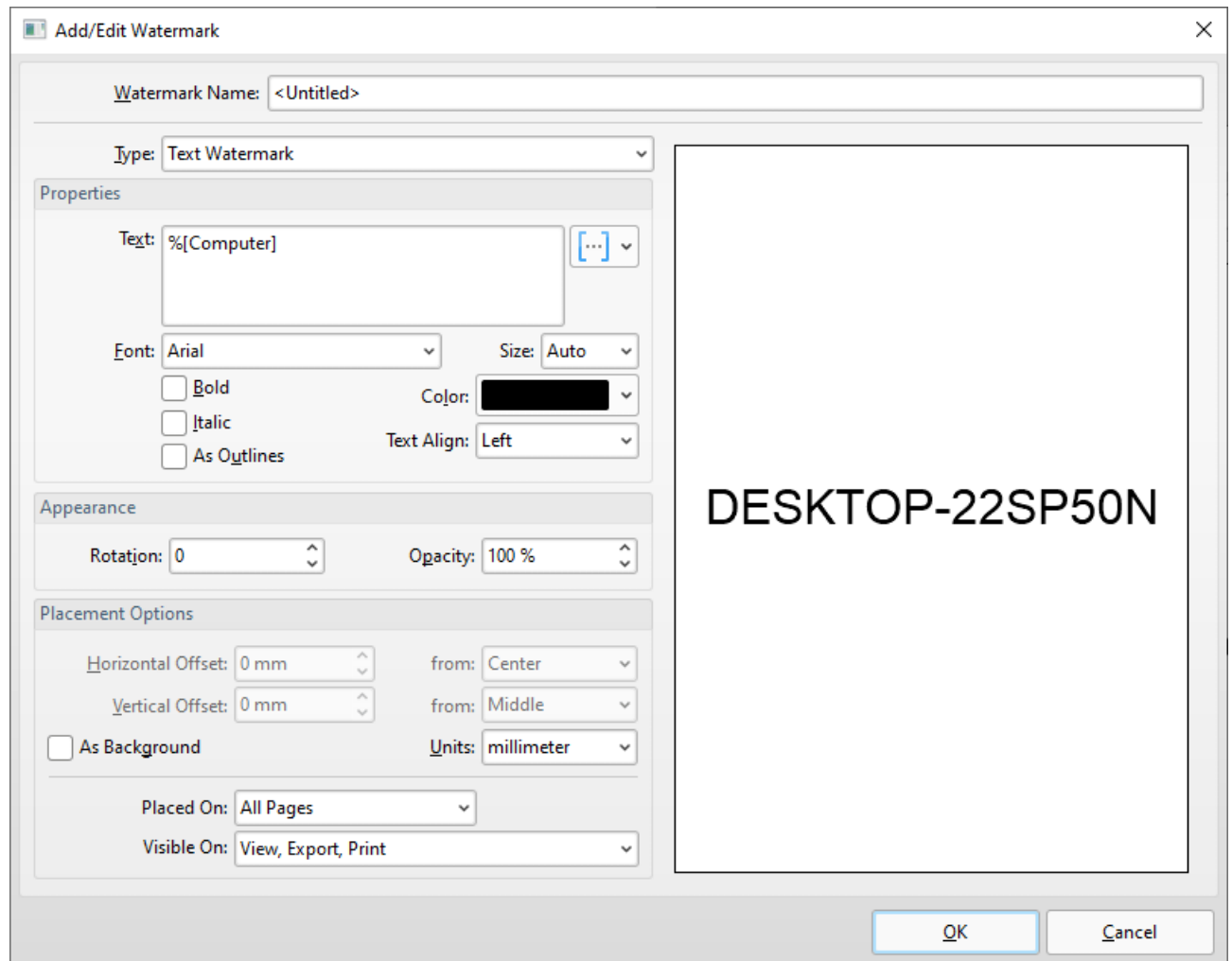
Figure 3. Add/Edit Watermark Dialog Box, %[Computer] Macro Example

3.2.3.3 **Date and Time Macros**

Date and Time Macros

There are several macros in **PDF-XChange Standard** that are used to create date and time output. They operate in an identical manner and are often used in conjunction with each other. The date and time macros are detailed below:

%[Date]

The **%[Date]** macro adds the current date. The following parameters are available:

- **d** inserts the day of the month and omits the zero in cases of single-digit values.
- **dd** inserts the day of the month and includes a zero in cases of single-digit values.
- **ddd** inserts the day of the week as a three-letter abbreviation.
- **dddd** inserts the day of the week.
- **M** inserts the month as a numerical value and omits the zero in cases of single-digit values.
- **MM** inserts the month as a numerical value and and includes a zero in cases of single-digit values.
- **MMM** inserts the month as a three-letter abbreviation.
- **MMMM** inserts the month.
- **yy** inserts the year as two digits and adds a zero in cases of values lower than 10.
- **yyyy** inserts the year.

The syntax for this macro when parameters are used is **%[Date:<Parameter>]**

Note that several parameters can be used in sequence in order to insert a customized date. For example, **%[Date:dddd, dd MMMM yyyy]** inserts the day of the week followed by the day of the month, the month name in full and the year as four digits:
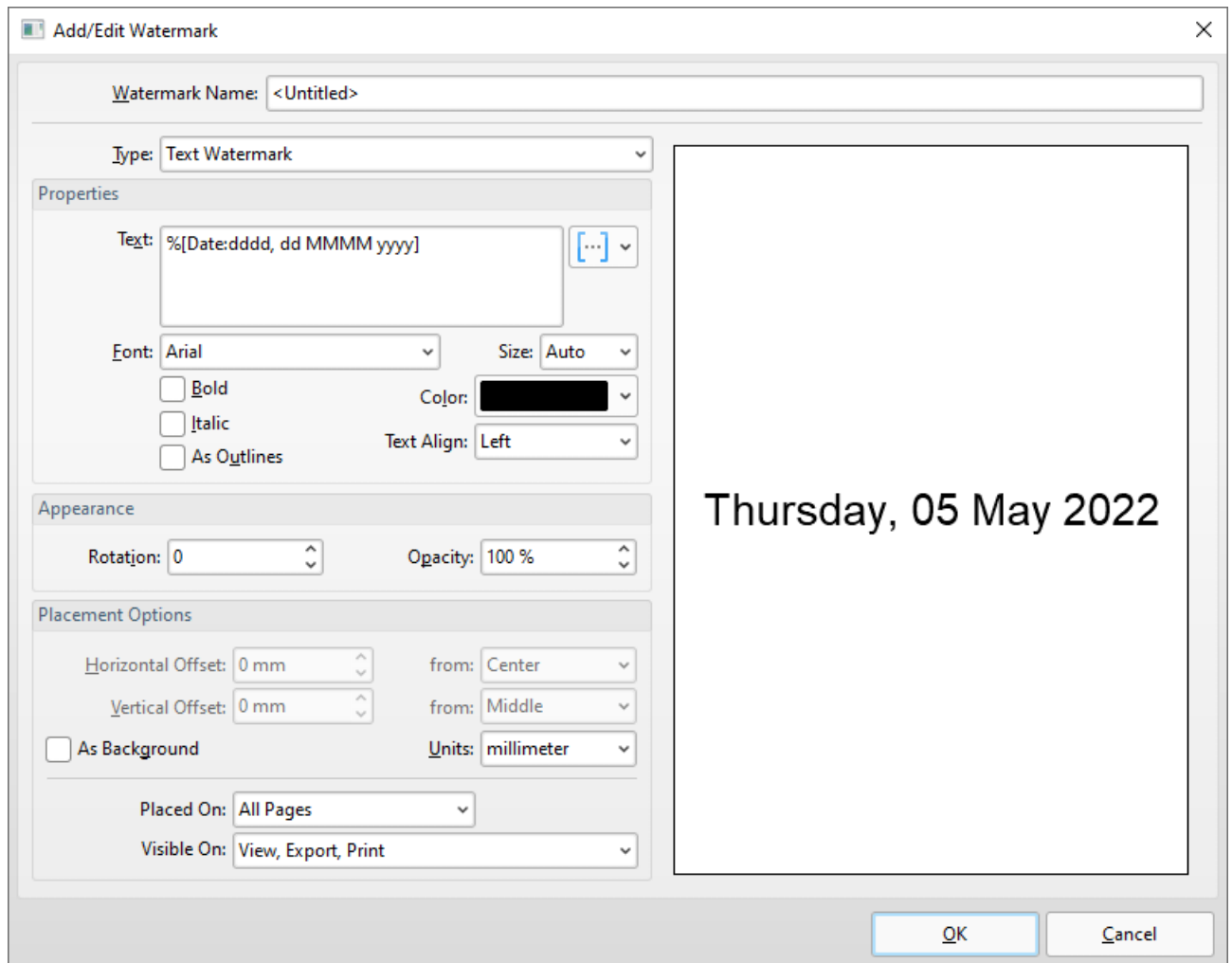
Figure 1. Add/Edit Watermark Dialog Box, Example %[Date] Macro

If parameters are not specified for this macro then output reverts to default, which is the the format **d/M/yyyy.**

%[Year]

The **%[Year]** macro adds the current year as a four-digit value.

%[Month]

The **%[Month]** macro adds the current month as a numerical value from 1-12.

%[Day]

The **%[Day]** macro adds the current day of the month as a two-digit value.

%[Time]

The **%[Time]** macro adds the current time. The following parameters are available:

- **h** inserts the hour and omits the zero in cases of single-digit values.
- **hh** inserts the hour and includes a zero in cases of single-digit values.
- **H** inserts the hour, includes a zero in cases of single-digit values and uses a 24 hour-clock.
- **m** inserts the minutes and omits the zero in cases of single-digit values.
- **mm** inserts the minutes and includes a zero in cases of single-digit values.
- **s** inserts the seconds and omits the zero in cases of single-digit values.
- **ss** inserts the seconds and includes a zero in cases single-digit values.
- **t** inserts a single character to reference the a.m./p.m. variable: **A** or **P.**
- **tt** inserts two characters to reference the a.m/p.m. variable: **AM** or **PM.**

The syntax for this macro when parameters are used is **%[Time:<Parameter>]**

Note that several parameters can be used in sequence in order to insert a customized time. For example, **%[Time:H:mm tt]** inserts the current hour and minutes, and inserts two characters to reference the a.m./p.m. variable:
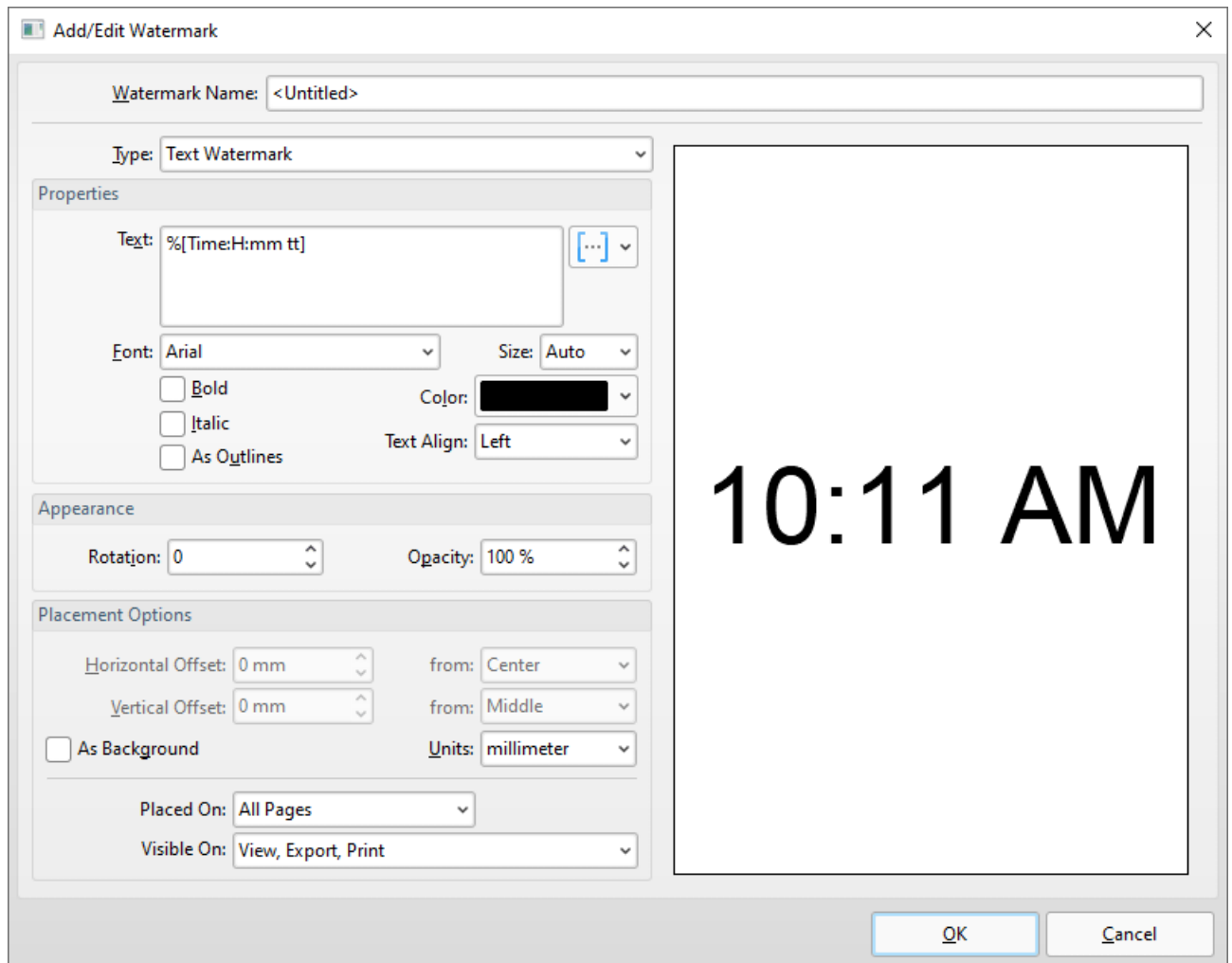
Figure 2. Add/Edit Watermark Dialog Box, Example %[Time] Macro

%[Hour]

The **%[Hour]** macro adds the hour value from the current time.

%[Minute]

The **%[Minute]** macro adds the minute value from the current time.

%[Seconds]

The **%[Seconds]** macro adds the second value from the current time.

Note that these macros can be combined as desired.

3.2.3.4   Document Name

Document Name

The **Document Name** macro adds the name of printed documents.

The syntax for this macro is **%[DocName]**

Example

Follow the steps below to use the **Document Name** macro to create a watermark that contains the name of the document in text format:

1. Click **Watermarks** in the settings menu, then click **Add:**

Figure 1. Watermarks Settings Dialog Box, Add Watermark Button Highlighted

The **Add/Edit Watermark** dialog box will open.

2. Clear the **Text** text box, then click the macro icon and click **Document Name** in the dropdown menu:

Figure 2. Add/Edit Watermark Dialog Box, Document Name Macro Selected

The **%[DocName]** macro is then added to the text box, and the watermark text updates to the name of the document:
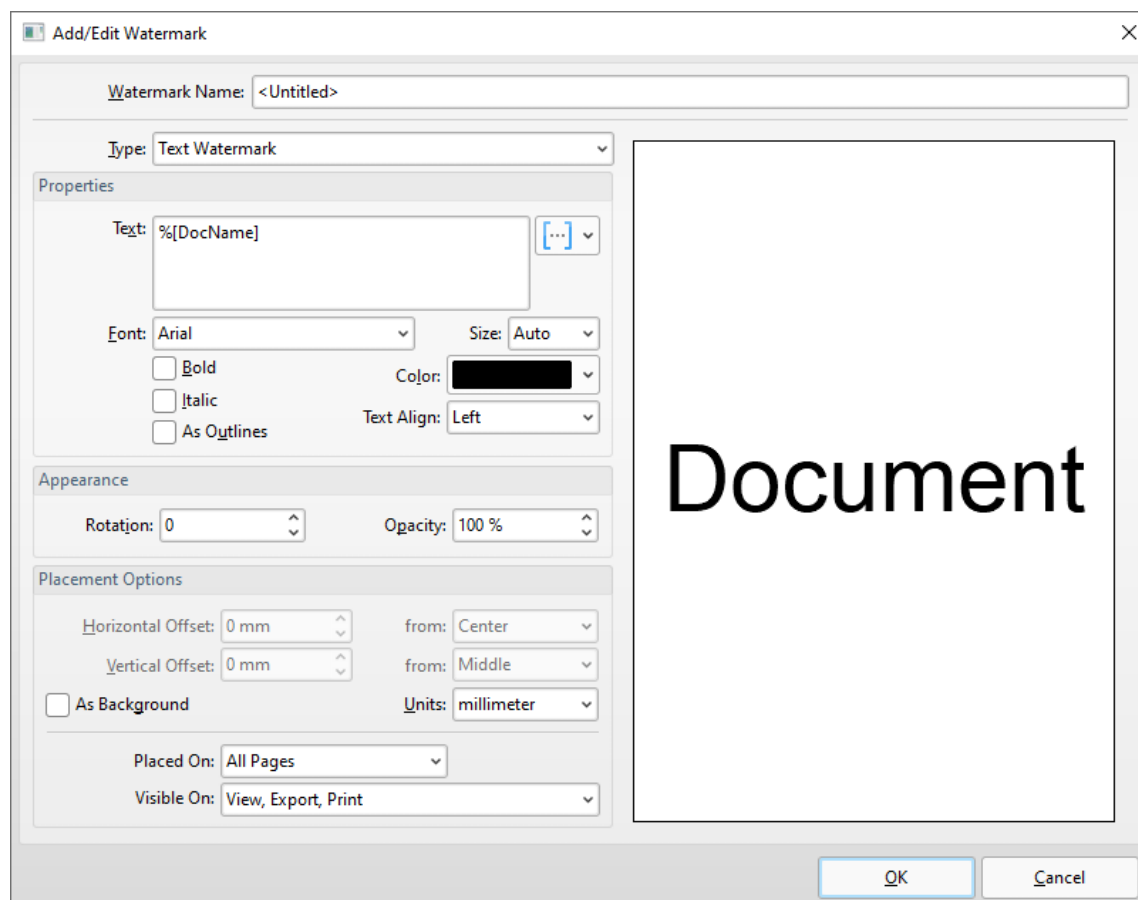
Figure 3. Add/Edit Watermark Dialog Box, %[DocName] Macro Example

Note that the preview pane displays the default value, which is the word **'Document.'** The watermark text will update to the name of documents when they are printed. For example, if the settings detailed above are used to print a document entitled **'Lorem Ipsum',** then it will print as detailed below:
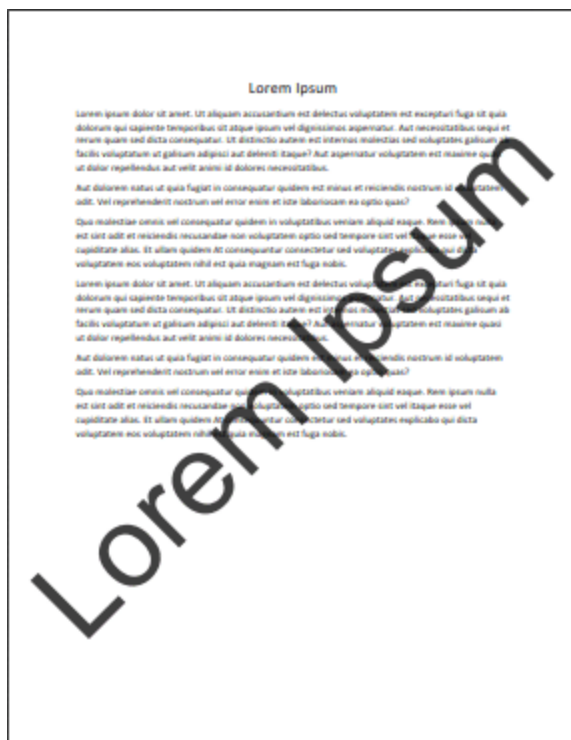
Figure 4. Sample %[DocName] Macro Output

Further Information

The **getDocumentName** function of the **titrules.js** JavaScript uses the document name at the time of printing to define this macro. This JavaScript is included to give **PDF-XChange Standard** priority over other applications when documents are saved. This is a necessary process because of the complicated manner in which **Microsoft** defines document names. Please note that modifying the **titjules.js** JavaScript is a complicated process that only experienced JavaScript programmers should perform. If you require assistance in doing this then please **Contact Us.**

3.2.3.5   Document Path

Document Path

The **Document Path** macro adds the source path of the printed document.

The syntax for this macro is **%[DocPath]**

Example

Follow the steps below to use the **Document Path** macro to create a watermark:
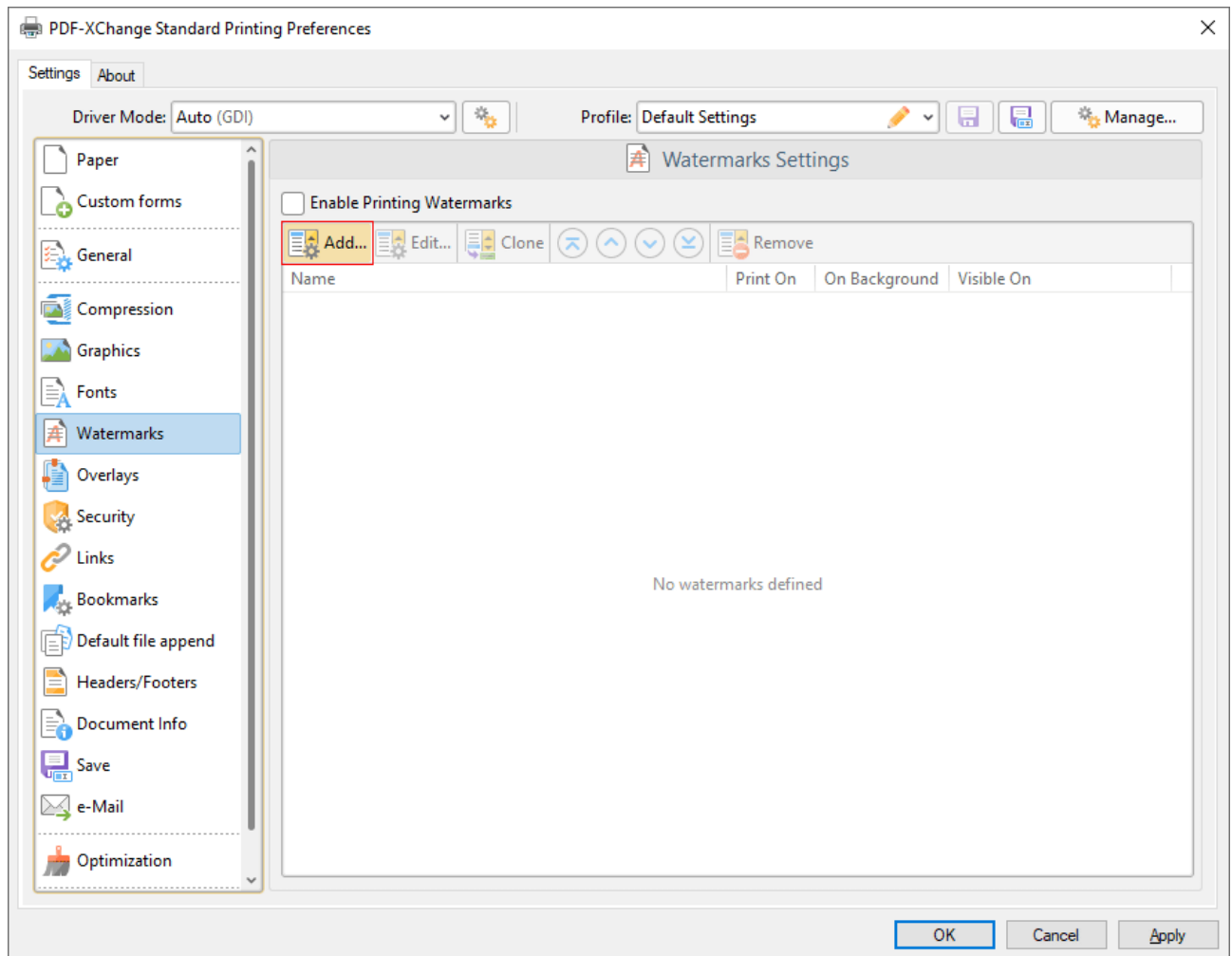
1. Click **Watermarks** in the settings menu, then click **Add:**

Figure 1. Watermarks Settings Dialog Box, Add Watermark Button Highlighted

The **Add/Edit Watermark** dialog box will open.

2. Clear the **Text** text box, then click the macro icon and click **Document Path** in the dropdown menu:
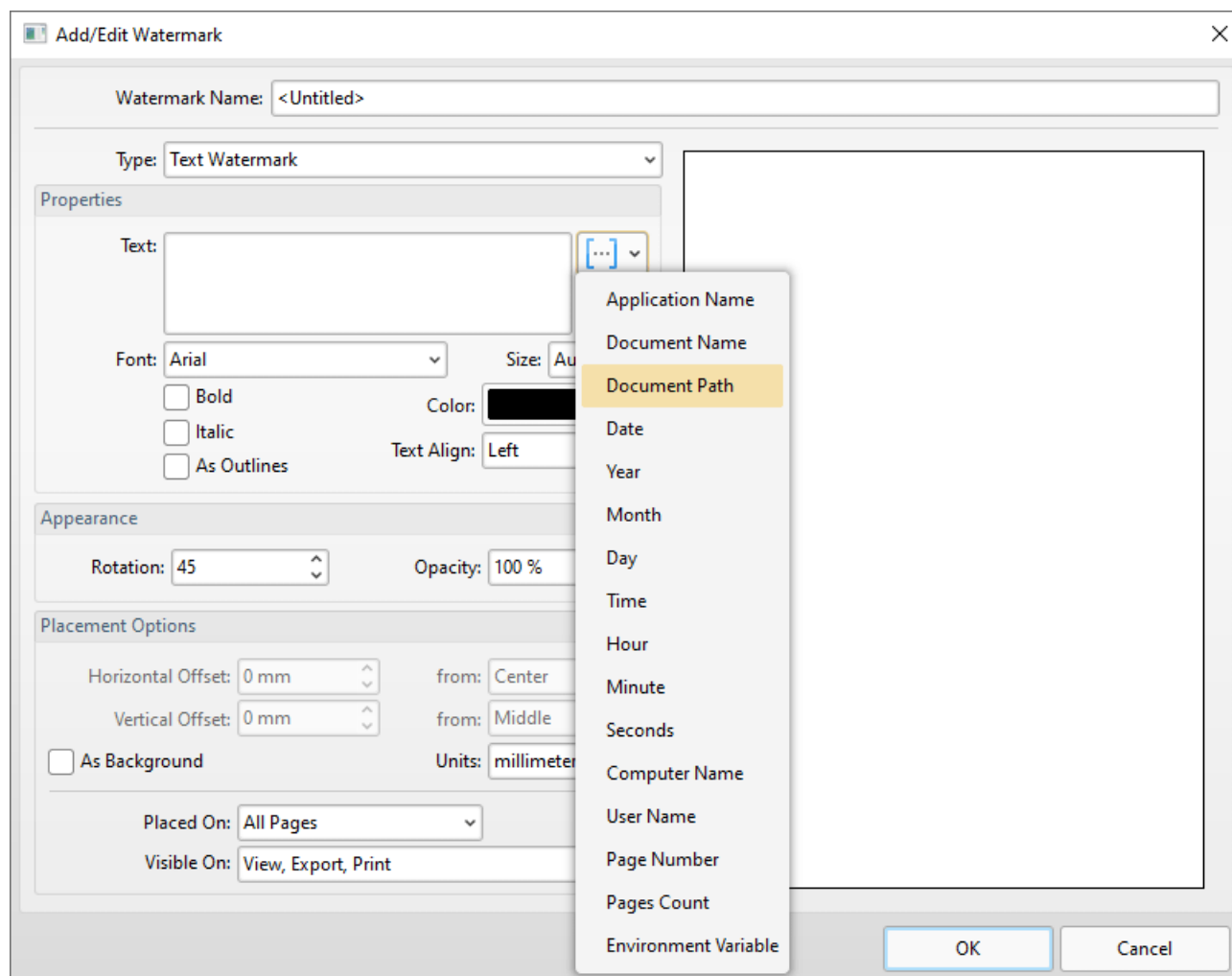
Figure 2. Add/Edit Watermark Dialog Box, Document Path Macro Selected

The **%[DocPath]** macro is then added to the text box, and the watermark text updates to the path of the document:
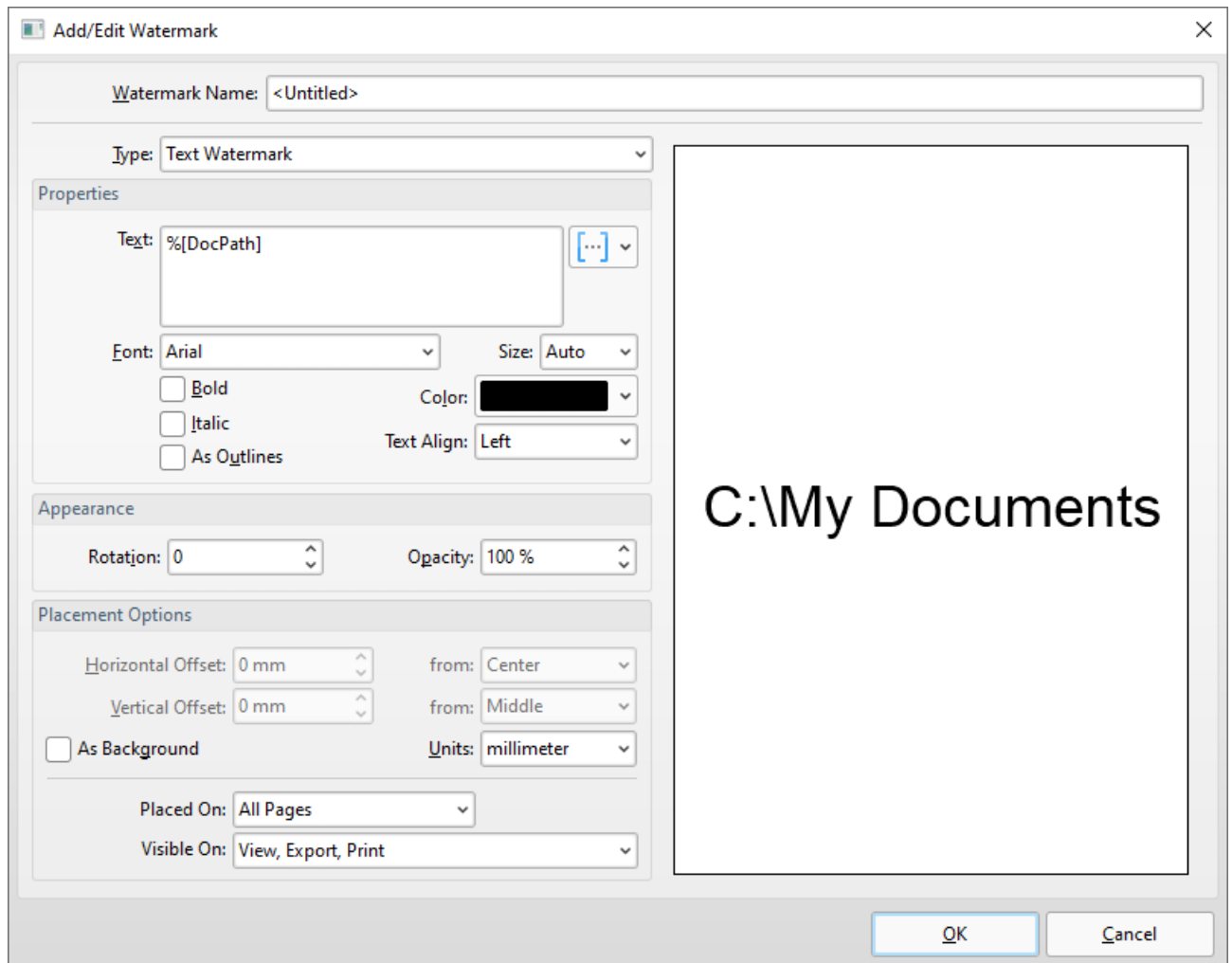
Figure 3. Add/Edit Watermark Dialog Box, %[DocPath] Macro Example

Note that the preview pane displays the default value, which is **'C:\My Documents.'** The watermark text will update to the path of documents when they are printed. For example, if the settings detailed above are used to print a document that is located on the desktop, then it will print as detailed below:

Figure 4. Sample %[DocPath] Macro Output

Please note that some printing applications cannot identify the paths of printed documents, and this macro will return no data in those cases. Furthermore, it should be noted that paths must be present in order to be referenced - unsaved documents, for example, return no data when this macro is used.

3.2.3.6   Environment Variable

Environment Variable

The **Environment Variable** macro adds information taken from user-specified variables.
This macro must be qualified with a parameter in order to return information.

The syntax for this macro is **%[Env:<Parameter>]** and the following parameters are available:

Parameters

- **ALLUSERSPROFILE** inserts the full path to the *All Users* profile directory.
- **APPDATA** inserts the full path to the *Application Data* directory of the current user.
- **CommonProgramFiles** inserts the full path to the *Common Files* directory.
- **CommonProgramFiles(x86)** inserts the full path to the *(x86) Common Files* directory in 64-bit versions of **Windows.**
- **CommonProgramFilesW6432** inserts the full path to the *Common Files* directory in 64-bit versions of **Windows.**
- **COMPUTERNAME** inserts the computer name.
- **HOMEDRIVE** inserts the drive letter on the local computer that is connected to the user's home directory.
- **HOMEPATH** inserts the complete path of the current user's *Home* directory, as defined by the user's account properties.
- **LOCALAPPDATA** inserts the complete path to the current user's *Application Data* directory.
- **LOGONSERVER** inserts the name of the domain controller that authenticated the client's logon request.
- **OS** inserts the name of the operating system.
- **PROCESSOR_ARCHITECTURE** inserts the chip architecture of the CPU.
- **ProgramData** inserts the full path to the *All Users* profile directory.
- **ProgramFiles** inserts the full path to the *Program Files* directory.
- **ProgramFiles(x86)** inserts the full path to the *(x86) Program Files* directory in 64-bit versions of **Windows.**
- **ProgramFilesW643** inserts the full path to the *Program Files* directory in 64-bit versions of **Windows.**
- **PUBLIC** inserts the full path to the *Public* directory.

- **SESSIONNAME** inserts the session name and number when a client is connected via a terminal server.
- **SystemDrive** inserts the name of the drive on which the system folder was placed.
- **SystemRoot** inserts the name of the system folder.
- **TEMP** inserts the name of the default temporary folder used by the operating system and applications available to the current user.
- **TMP** inserts the name of the default temporary folder used by the operating system and applications available to the current user. (Note that some applications require the **TEMP** environment variable, whilst others require **TMP.** The values for both should be identical).
- **USERDOMAIN** inserts the name of the user domain that contains the account of the current user.
- **USERDOMAIN_ROAMINGPROFILE** inserts the name of the user domain for RDS or standard roaming profile paths.
- **USERNAME** inserts the name of the current user.
- **USERPROFILE** inserts the location of the current user's profile directory.
- **windir** inserts the full path to the *Windows* directory.

Example

Follow the steps below to use the **Environment Variable** macro to create a watermark from the full path to the *Common Files* directory:

1. Click **Watermarks** in the settings menu, then click **Add:**
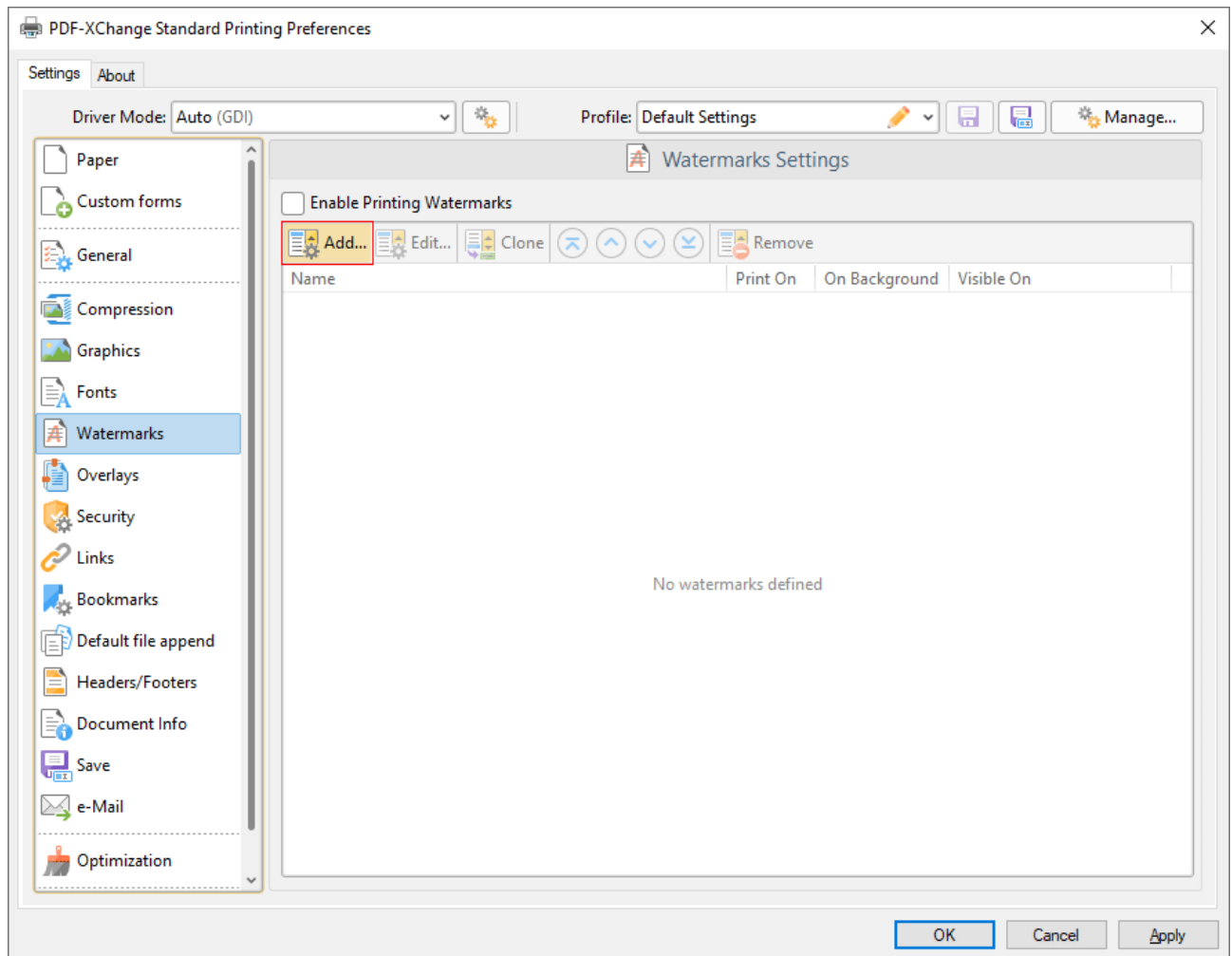
Figure 1. Watermarks Settings Dialog Box, Add Watermark Button Highlighted

The **Add/Edit Watermark** dialog box will open.

2. Clear the **Text** text box, then click the macro icon and click **Environment Variable** in the dropdown menu:
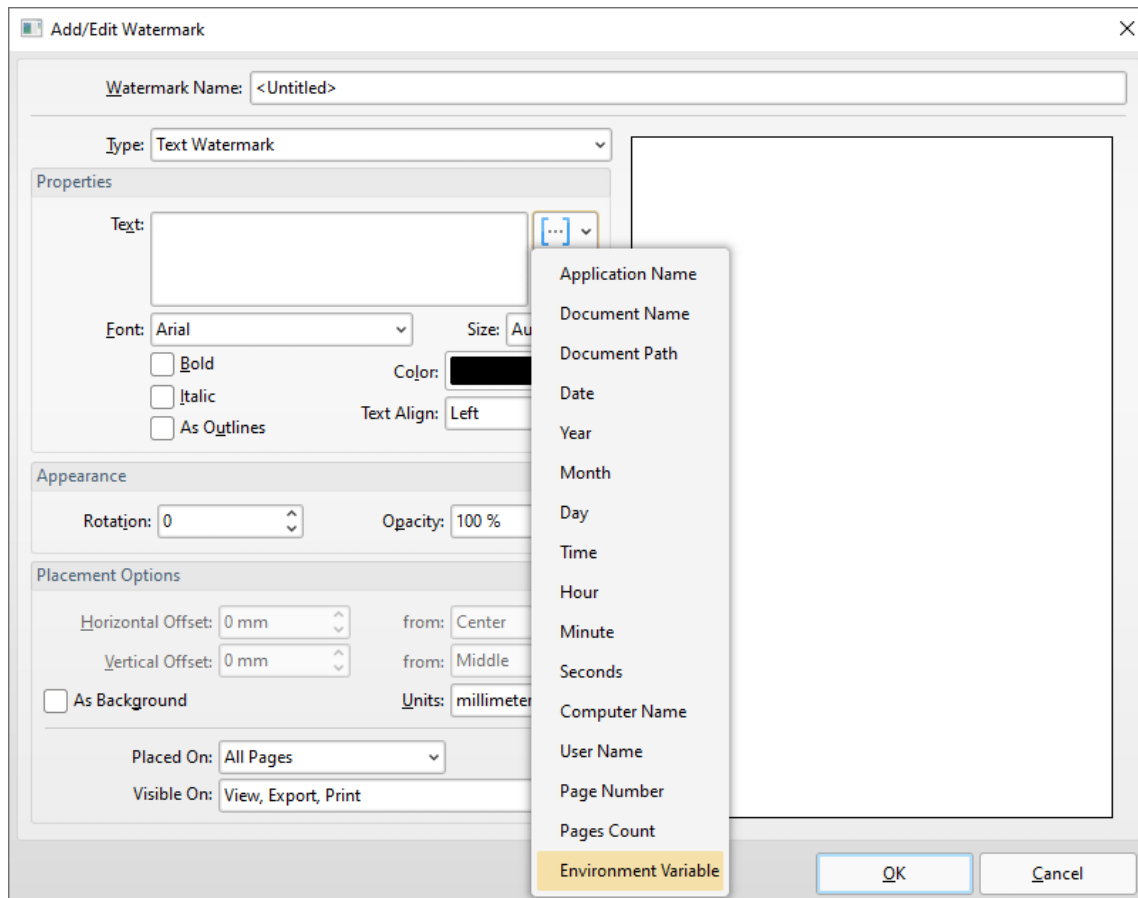
Figure 2. Add/Edit Watermark Dialog Box, Environment Variable Macro Selected

The **%[Env]** macro is then added to the text box.

3. Add the text **":CommonProgramFiles"** to the macro.

The watermark text will update to the full path to the *Common Files* directory:
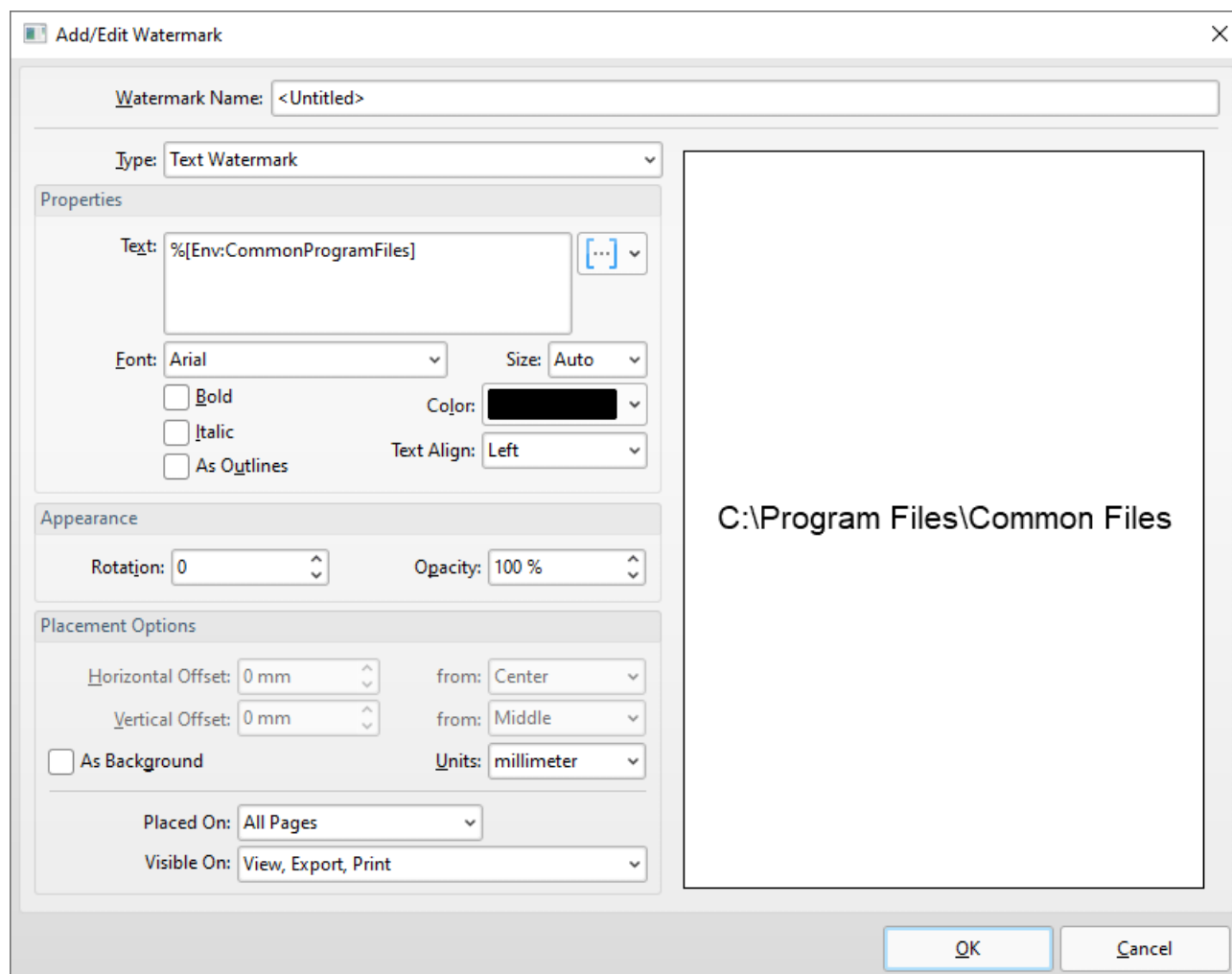
Figure 3. Add/Edit Watermark Dialog Box, %[Env:CommonProgramFiles] Macro Example

3.2.3.7   Pages Count

Pages Count

The **Pages Count** macro adds the number of document pages.

The syntax for this macro is **%[Pages]**

Example

Follow the steps below to use the **Pages** macro to create a watermark:
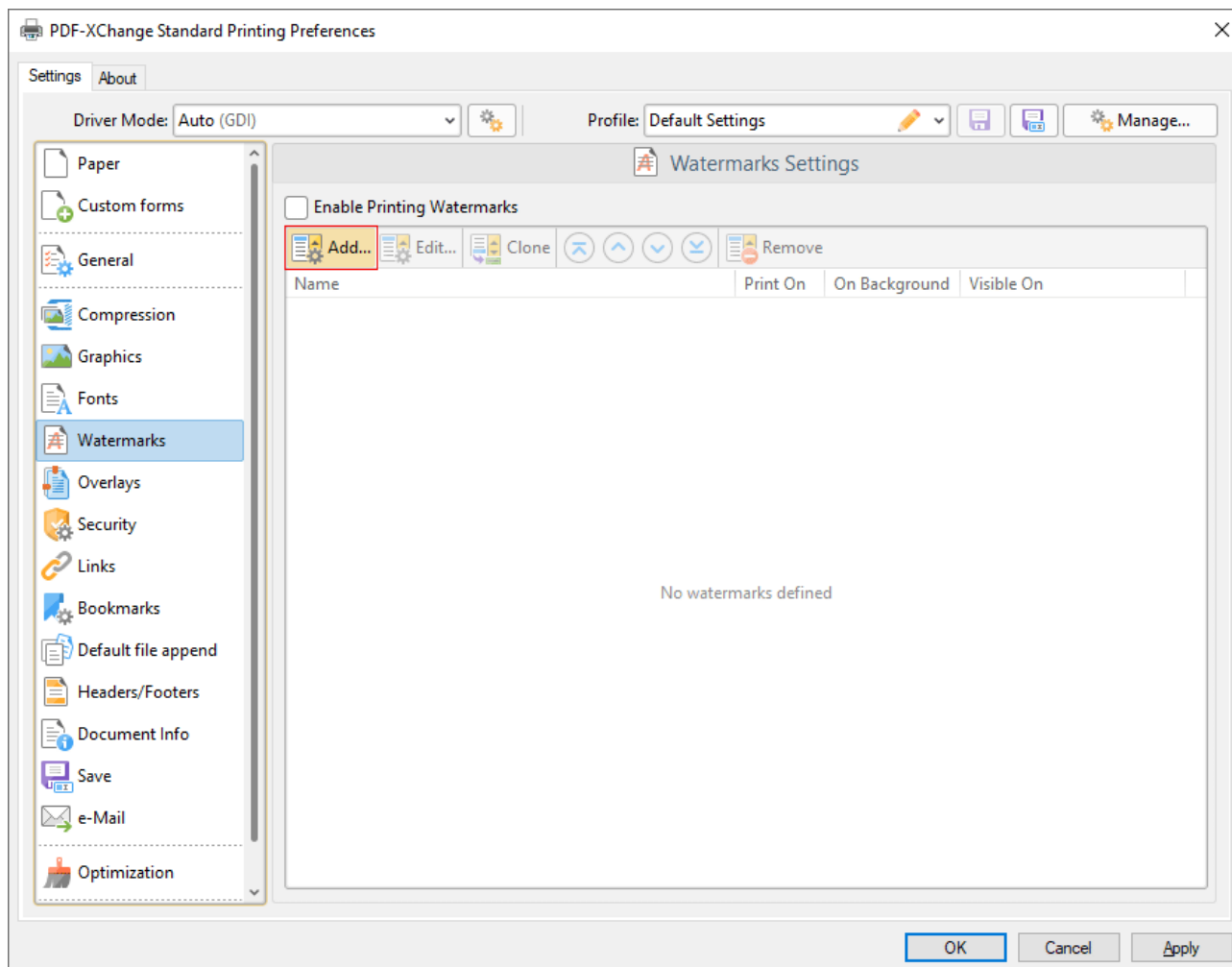
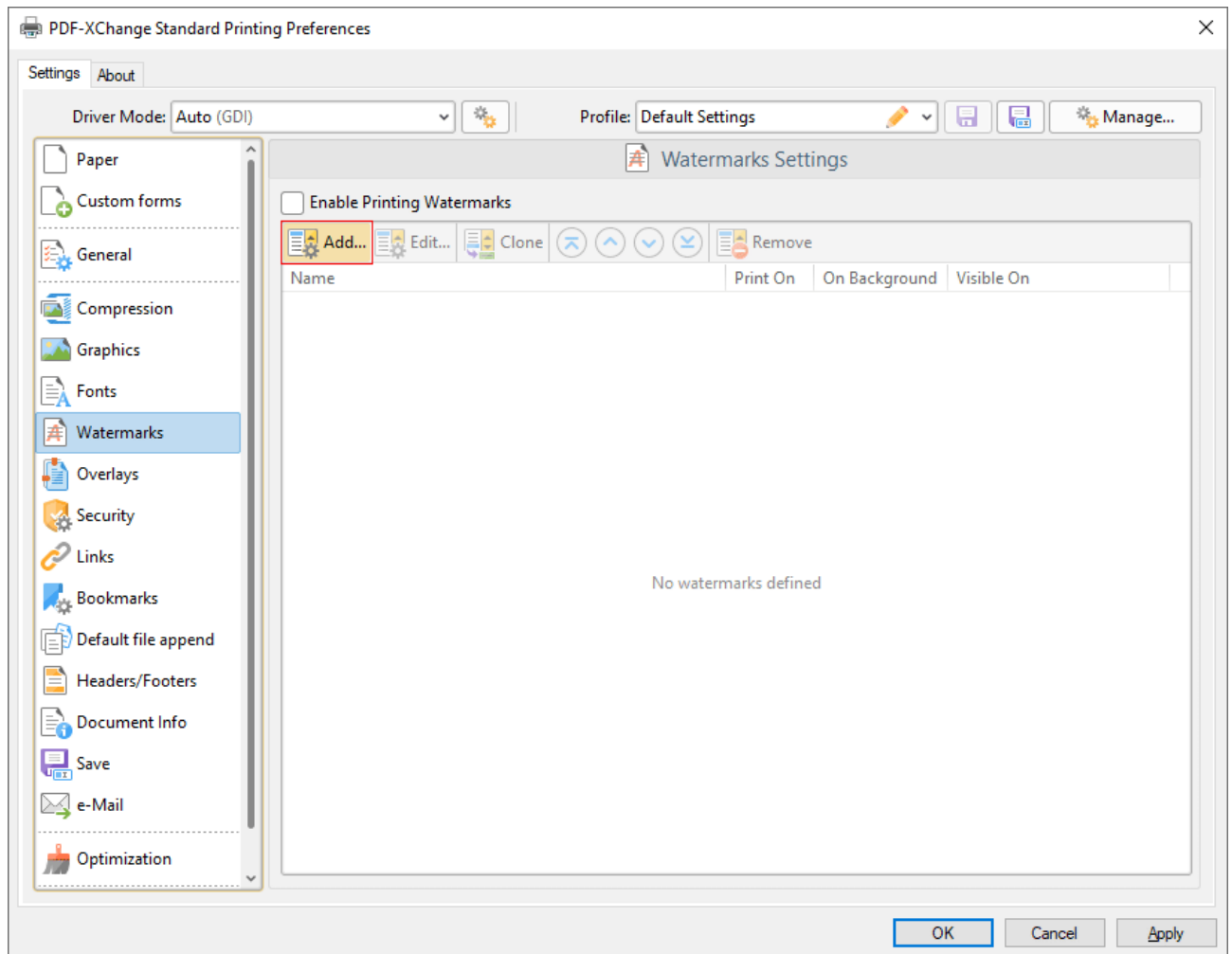   1. Click **Watermarks** in the settings menu, then click **Add:**

**Figure 1.** Watermarks Settings Dialog Box, Add Watermark Button Highlighted

The **Add/Edit Watermark** dialog box will open.

2. Clear the **Text** text box, then click the macro icon and click **Pages Count** in the dropdown menu:
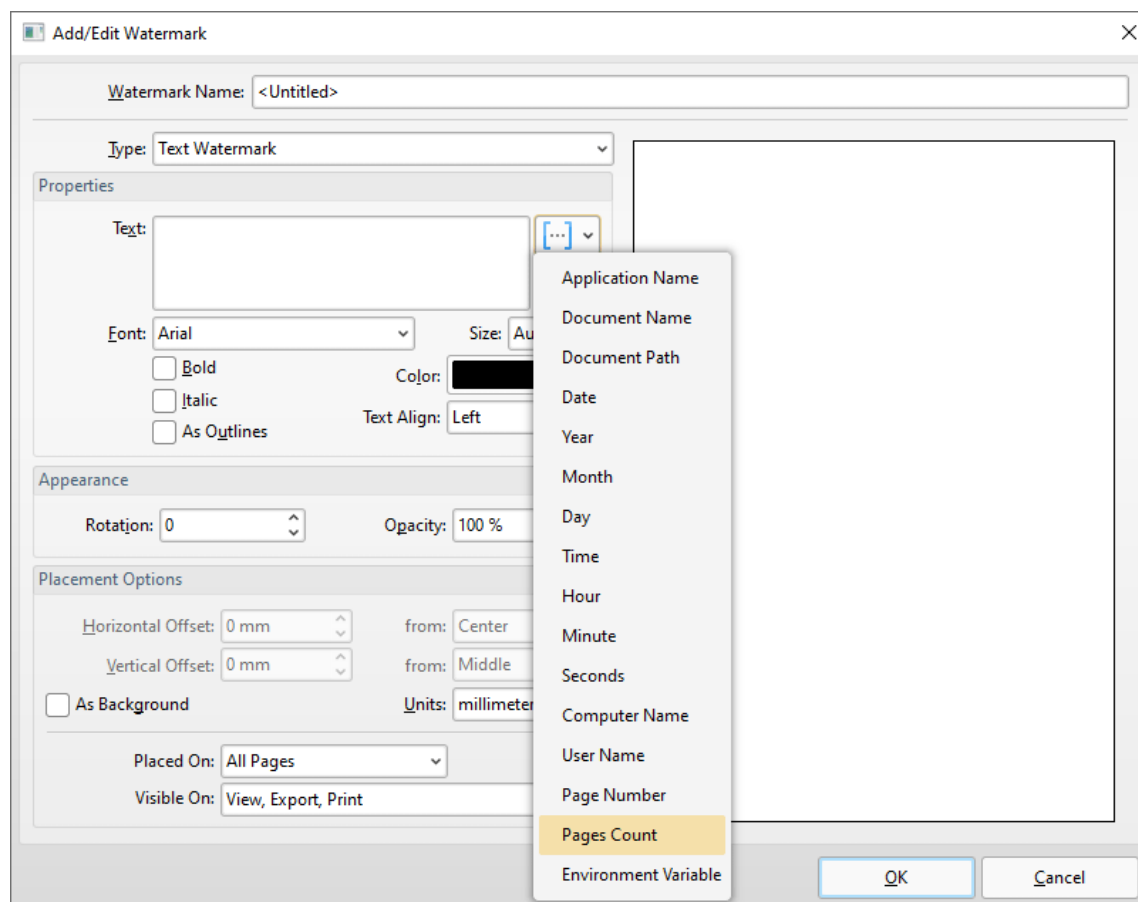
Figure 2. Add/Edit Watermark Dialog Box, Pages Count Macro Selected

The **%[Pages]** macro is then added to the text box, and the watermark text updates to the number of document pages. For example, in a three-page document, it appears as detailed below:
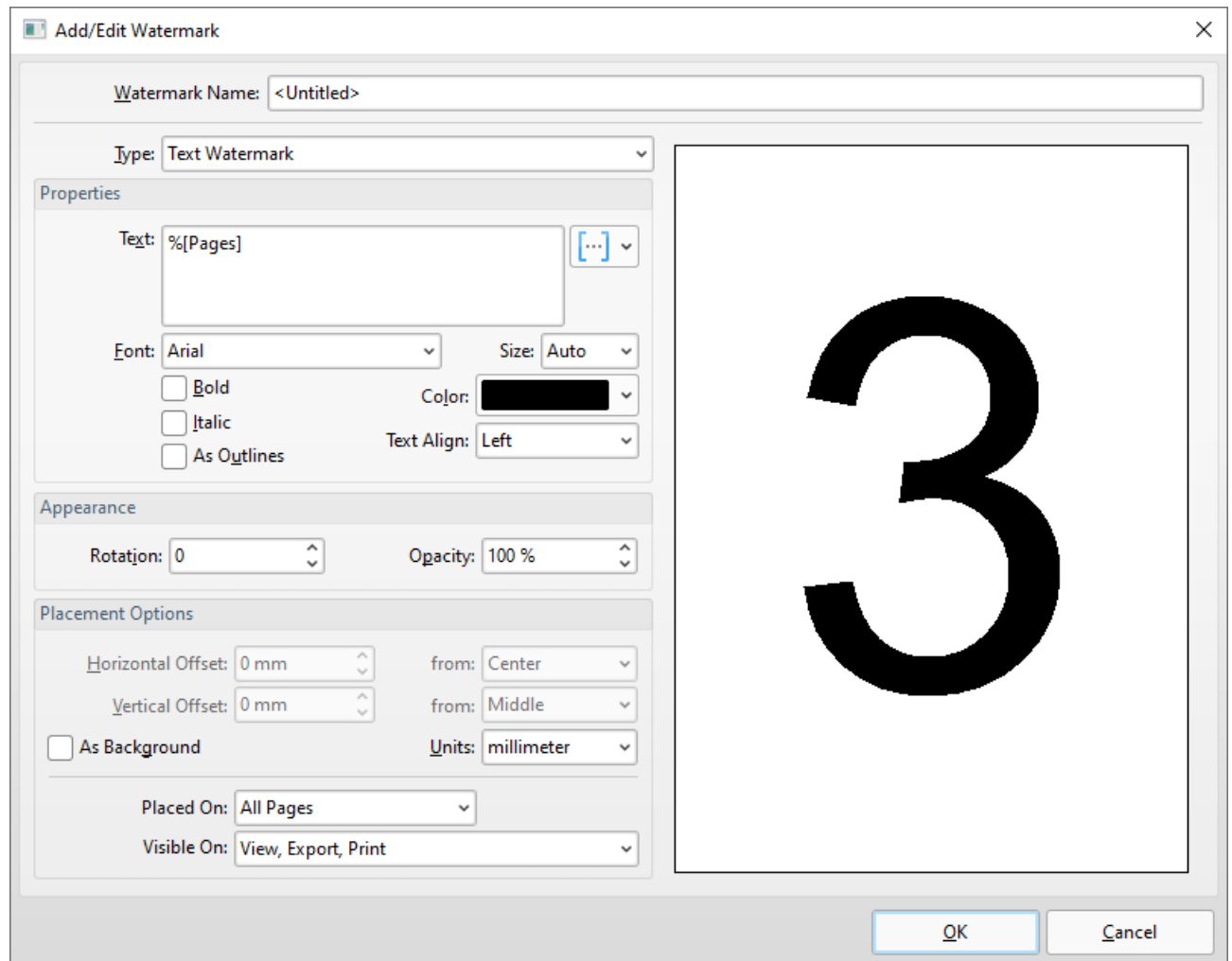
Figure 3. Add/Edit Watermark Dialog Box, %[Pages] Macro Example

3.2.3.8 **Page Number**

Page Number

The **Page Number** macro adds the page number of source pages.

The syntax for this macro is **%[Page]**

Example

Follow the steps below to use the **Page Number** macro to create a watermark:
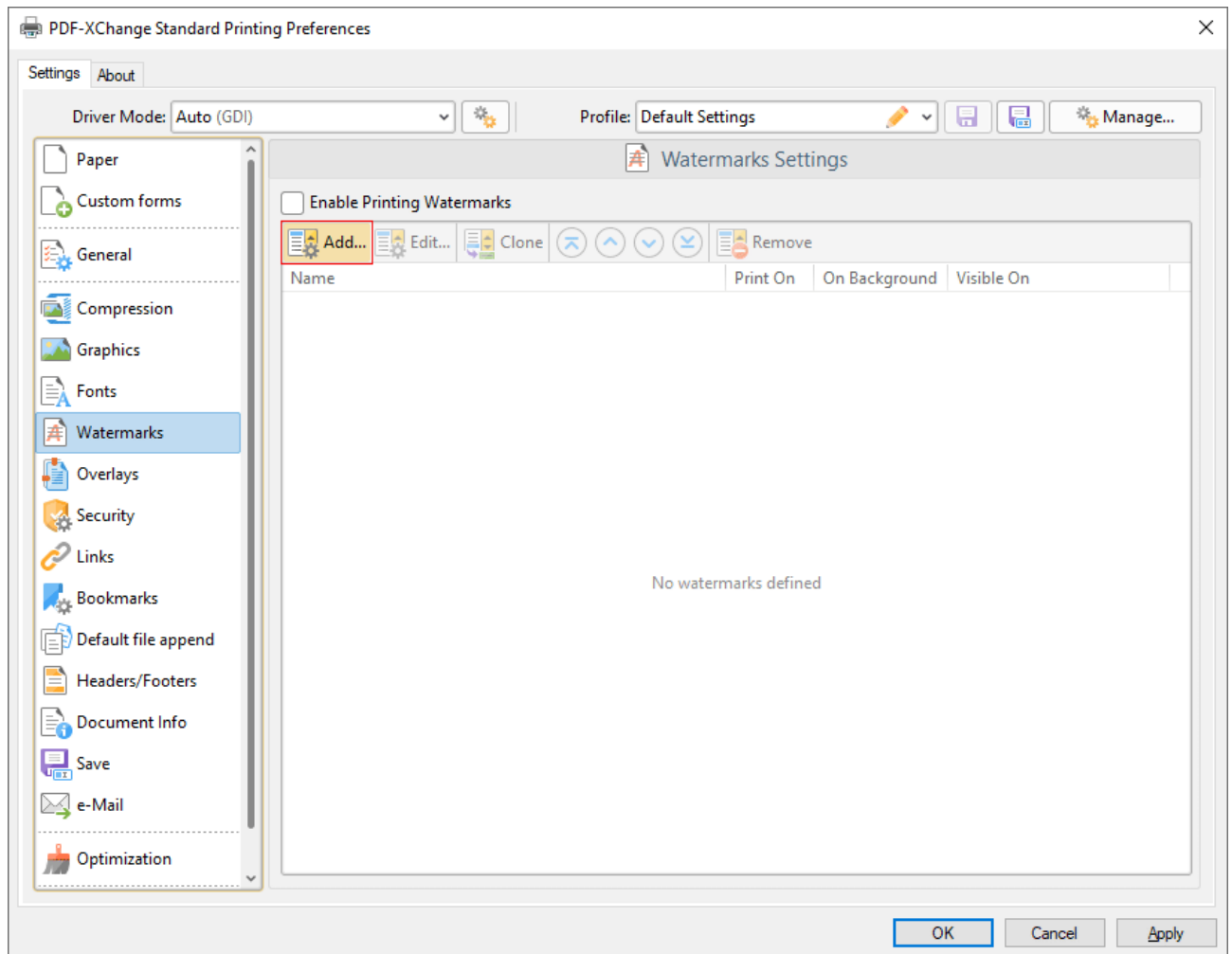
    1. Click **Watermarks** in the settings menu, then click **Add:**

Figure 1. Watermarks Settings Dialog Box, Add Watermark Button Highlighted

The **Add/Edit Watermark** dialog box will open.

2. Clear the **Text** text box, then click the macro icon and click **Page Number** in the dropdown menu:
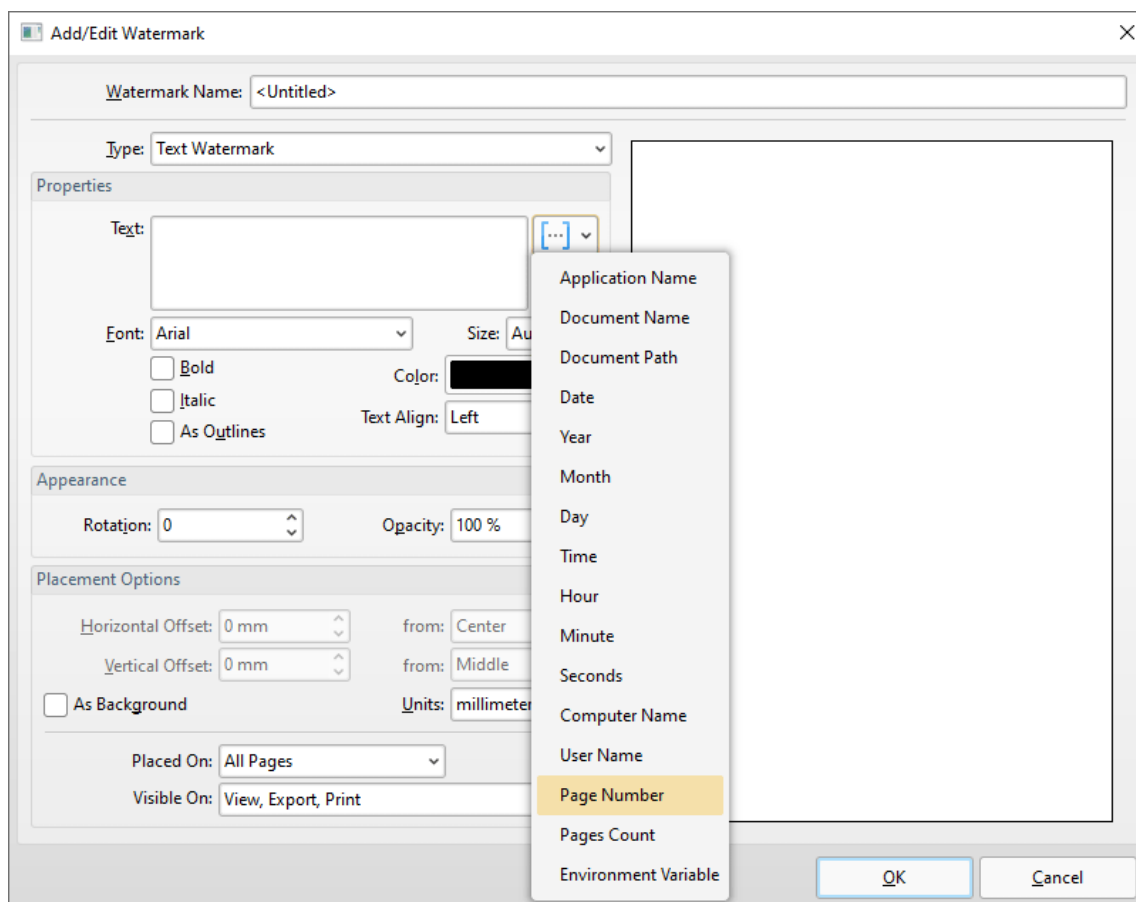
Figure 2. Add/Edit Watermark Dialog Box, Page Number Macro Selected

The **%[Page]** macro is then added to the text box, and the watermark text updates to the page number:
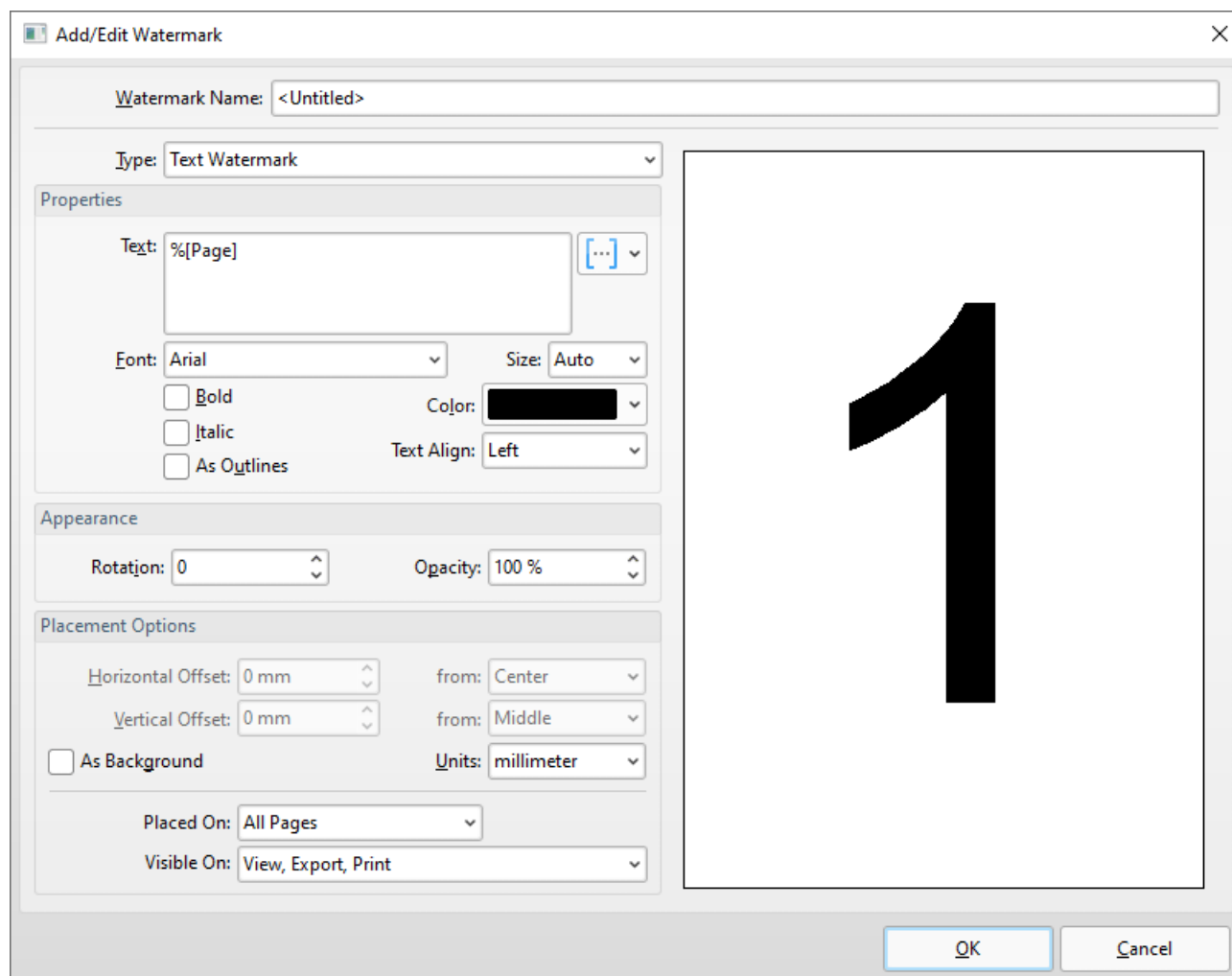
Figure 3. Add/Edit Watermark Dialog Box, %[Page] Macro Example

Note that the preview window displays the default value, which is '1' as this represents the first page. If the **Page Number** macro is used when printing a three-page document, for example, then the output pages will appear as detailed below:
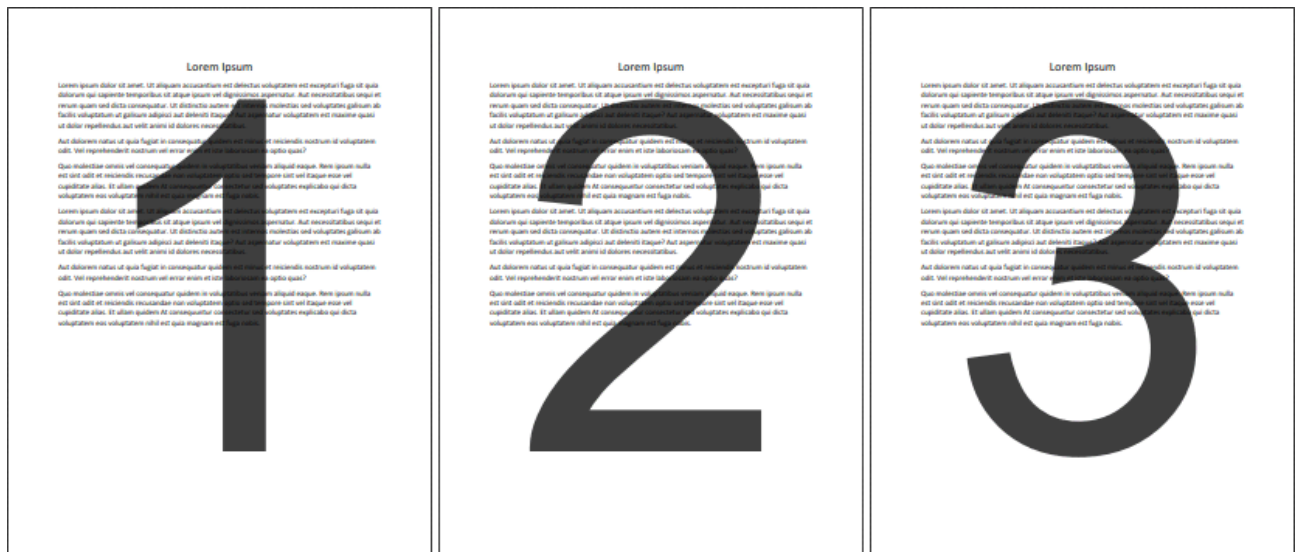
Figure 4. %[Page] Macro Output Example, Three Page Document

3.2.3.9   User Name

User Name

The **User Name** macro adds the name of the current user.

The syntax for this macro is **%[User]**

Example

Follow the steps below to use the **User Name** macro to create a watermark:

    1. Click **Watermarks** in the settings menu, then click **Add:**

Figure 1. Watermarks Settings Dialog Box, Add Watermark Button Highlighted

The **Add/Edit Watermark** dialog box will open.

2. Clear the **Text** text box, then click the macro icon and click **User Name** in the dropdown menu:
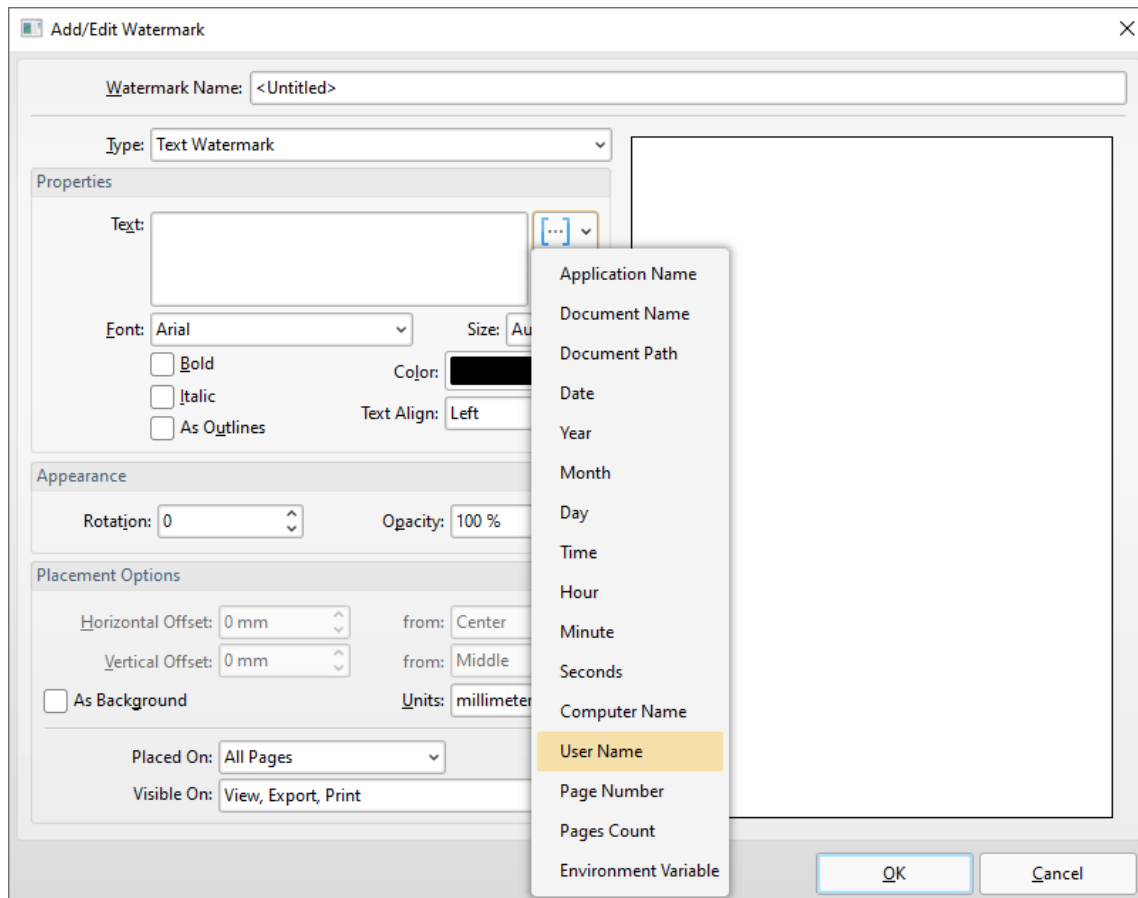
Figure 2. Add/Edit Watermark Dialog Box, User Name Macro Selected

The **%[User]** macro is then added to the text box, and the watermark text updates to name of the current user:
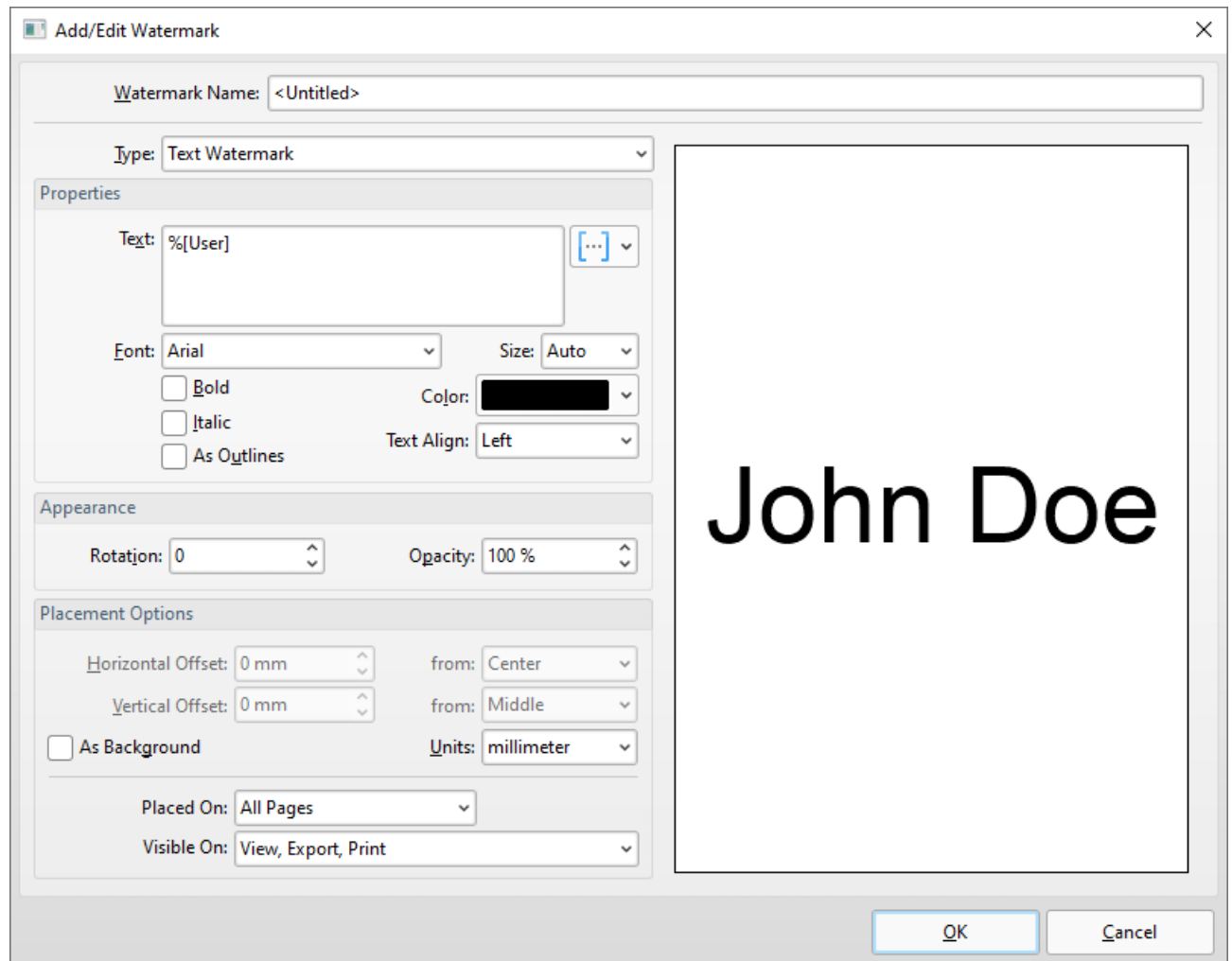
Figure 3. Add/Edit Watermark Dialog Box, %[User] Macro Example

3.2.4 **Paper**

Paper

The **Paper** settings determine the size, orientation, margin, scaling factor, layout and printing order of pages, and the **DPI** resolution of images. Please note that some programs, such as **Microsoft Word**, override the properties determined in the **Paper** settings**.** This is because they use values determined within their own parameters and give those values priority over the options in **PDF-XChange Standard.**

Click **Paper** in the menu on the left side of the main window to customize the **Paper Settings:**
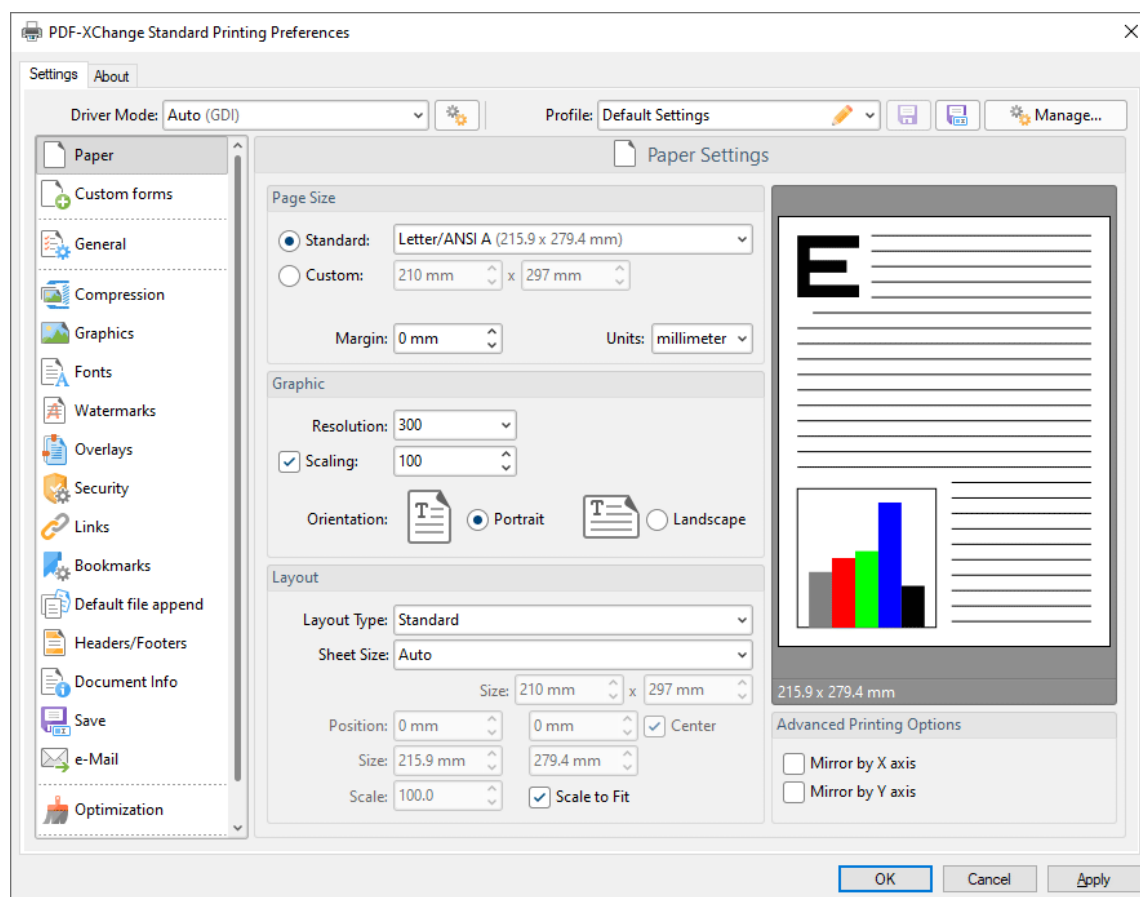
Figure 1. Paper Settings Dialog Box

Page Size

- **Standard** features industry-standard standardized sizes, and also includes custom profiles that the **Custom Forms** 122 feature has been used to create.
- **Custom** enables custom dimensions (to a maximum of two hundred inches). Use the number boxes to determine document dimensions. Use the dropdown list to determine the units of measurement.
- **Margins** adjusts the size of document margins.

Please note that **AutoCAD** may present issues when printing, especially when it plots to virtual print drivers such as **PDF-XChange Standard.** If problems arise, especially in regard to portions of output exceeding the defined margin/page limits, we recommend setting a margin of at least 3.2mm.

Graphic

- **Resolution** is measured in **DPI** (dots per inch). Use the **Resolution** number boxes to determine **DPI**. (Note that increasing **DPI** may decrease or increase the file size, depending on the content being printed. If the content is predominantly drawings (lines, curves, filled regions) or text, then increasing **DPI** may decrease the final file size - especially in the case of text. However, if the content is predominantly image-based, then increasing **DPI** will increase the file size in most cases).
- **Scaling** determines the size of converted documents in relation to original content.
- **Orientation** sets **Portrait** or **Landscape** as the page orientation.

Page Layout

- **Standard** layout features one page per PDF page. See **here** 116 for further options.
- **Booklet** layout features adjacent pages and is used for booklets and similar documents. See **here** 118 for further options.
- **Multiple Pages Per Sheet** features multiple document pages per PDF page. Select a value to view the layout in the preview window. See **here** 120 for further options.

Sheet Size

- **Auto** sets sheet size automatically.
- **Custom** enables custom dimensions.
- The remaining options are industry-standard dimensions.

Advanced Printing Options

- Select **Mirror by X Axis** to print a mirror version of the document that is reversed on the horizontal axis.

- Select **Mirror by X Axis** to print a mirror version of the document that is reversed on the vertical axis.
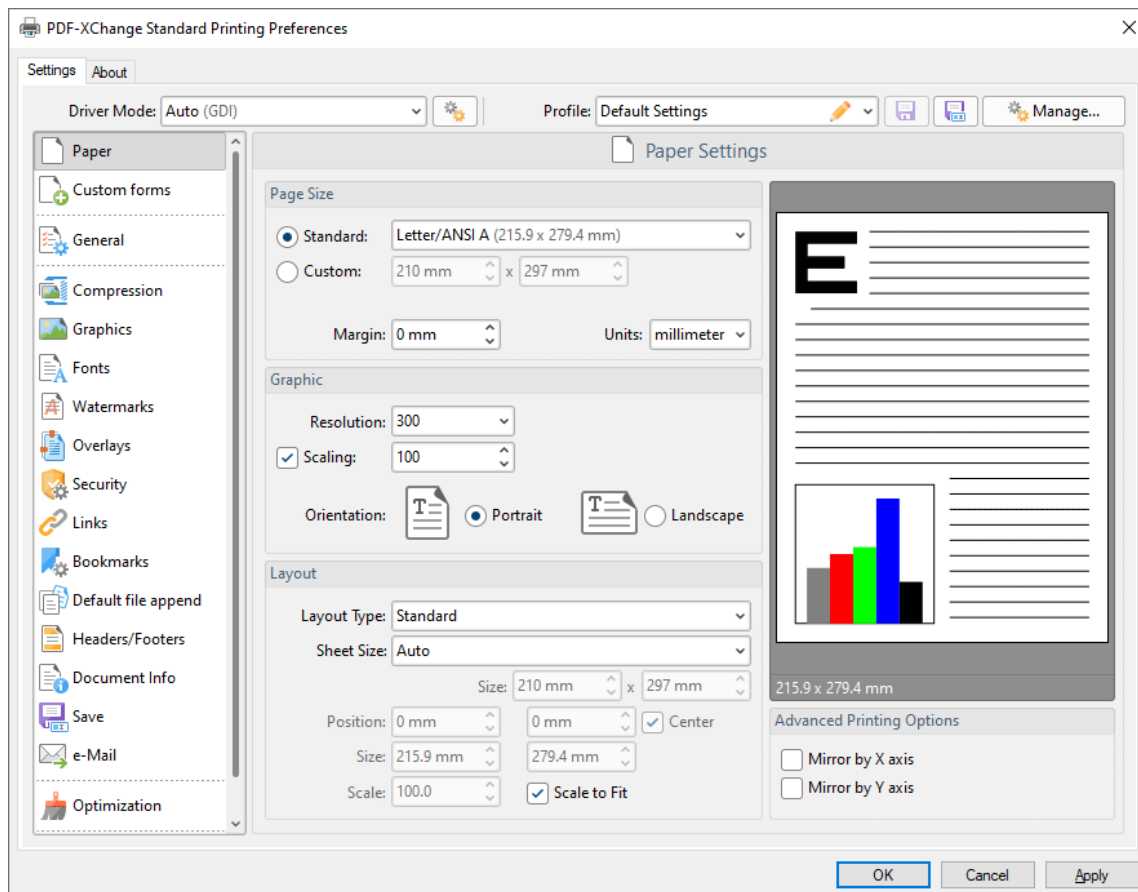
Click **OK** to save changes.

3.2.4.1   Standard Layout

Standard Layout

The **Standard** layout is used to print one document page per PDF page. The options detailed below are available when **Standard** is selected in the **Layout Type** dropdown menu:

Figure 1. Paper Settings Dialog Box, Layout Type Dropdown Menu Selected, Standard Option

The **Sheet Size** options determine document dimensions:

- **Auto** sets sheet size automatically.

- **Custom** enables custom dimensions. Enter the desired dimensions in the **Size** boxes.
- The remaining options are industry-standard dimensions.

Other Options

- If the **Scale To Fit** box is selected then layout options scale to the page size. Clear the box to disable this setting and then enter values in the **Size** and **Scale** number boxes or use the preview pane to resize pages.
- If the **Center** box is selected then documents are centered on the page and will remain centered when the size is adjusted. Clear the box to disable this setting and then enter values in the **Position** number boxes to determine page position.

Click **OK** to save changes.

3.2.4.2 Booklet Layout

Booklet Layout

The **Booklet** layout is used to print booklets and similar documents. When it is selected in the **Layout Type** menu the following options are available:
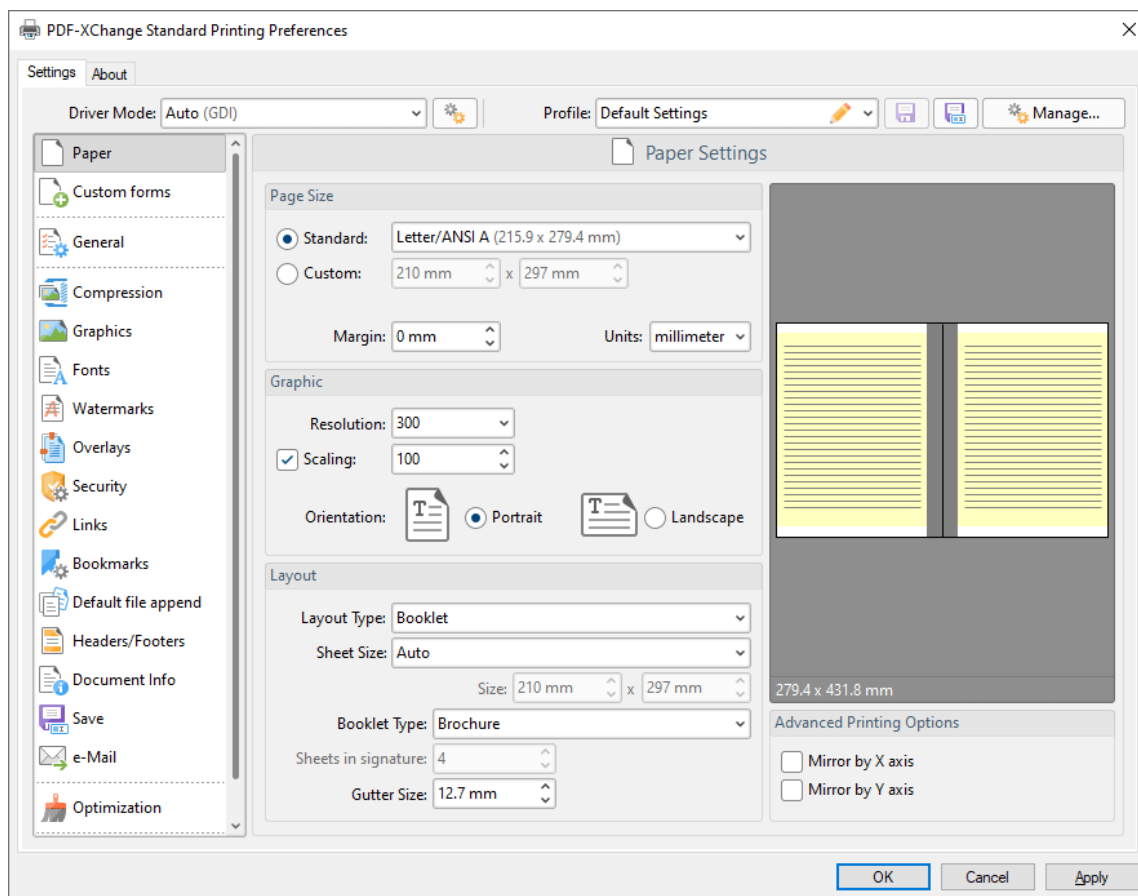
Figure 1. Paper Settings Dialog Box, Booklet Options

The **Sheet Size** options determine document dimensions:

- **Auto** sets sheet size automatically.
- **Custom** enables custom dimensions. Enter the desired dimensions in the **Size** boxes.

- The remaining options are industry-standard dimensions.

The **Booklet Type** options determine the booklet format:

- **Brochure** creates brochures, which are usually two or four pages in length and fit on a single sheet.
- **Books** have more pages than brochures and usually feature double-sided printing.
- Use the **Sheets in signature** number box to determine how sheets are folded.
- Use the **Gutter size** number box to determine the binding margin area, which the gray area in the preview pane represents. The default size is the industry-standard 12.7mm

Click **OK** to save changes.

3.2.4.3 Multiple Pages per Sheet

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Multiple Pages per Sheet

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The **Multiple Pages per Sheet** layout is used to print multiple document pages per printed page. When it is selected in the **Layout Type** menu the following options are available:
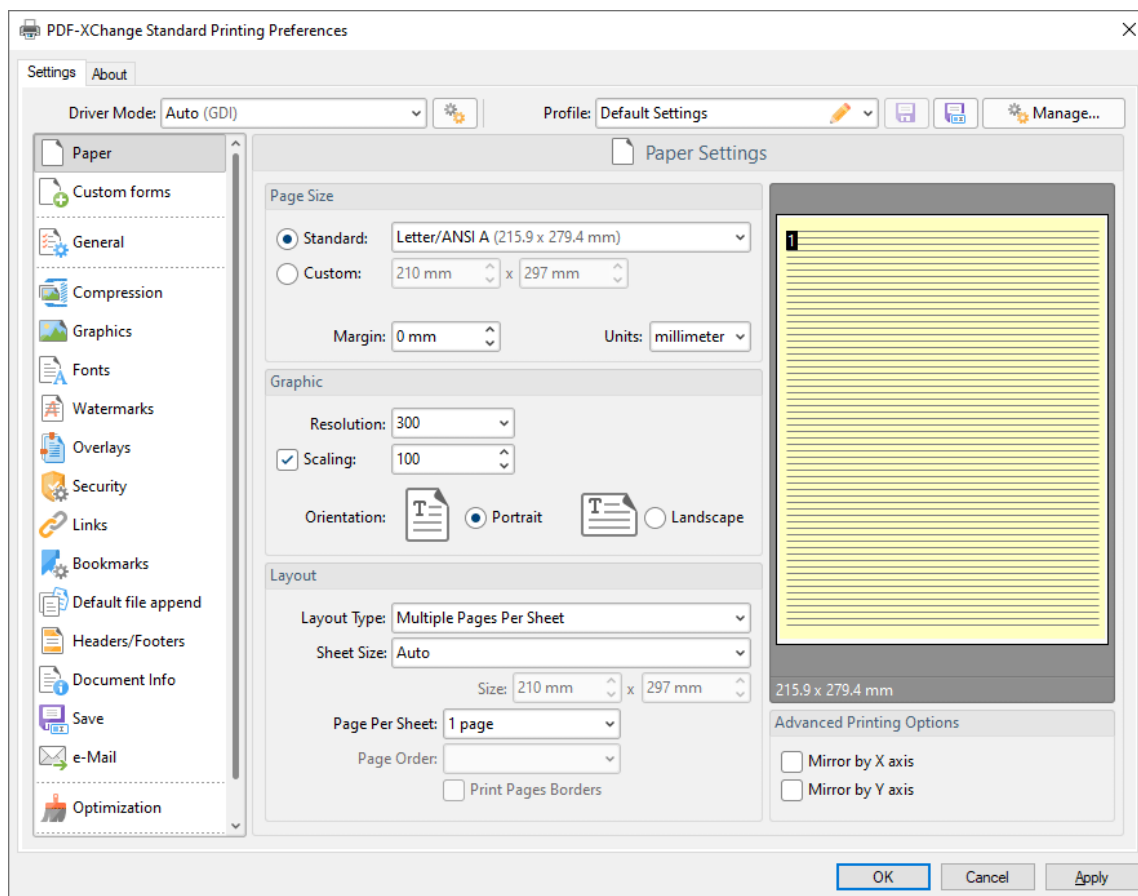
Figure 1. Paper Settings Dialog Box, Multiple Pages Per Sheet Options

The **Sheet Size** options determine document dimensions:

- **Auto** sets sheet size automatically.
- **Custom** enables custom dimensions. Enter the desired dimensions in the **Size** boxes.

- The remaining options are industry-standard dimensions.

Further Options

- The **Page Per Sheet** dropdown menu determines how many pages feature on each sheet.
- The **Page Order** menu determines how pages are ordered in the PDF document. Select an option to view the layout in the preview pane.
- Select the **Print Pages Borders** box to print page borders.

Click **OK** to save changes.

3.2.5 **Custom Forms**

Custom Forms

The **Custom Forms** settings are used to save custom forms for subsequent use:
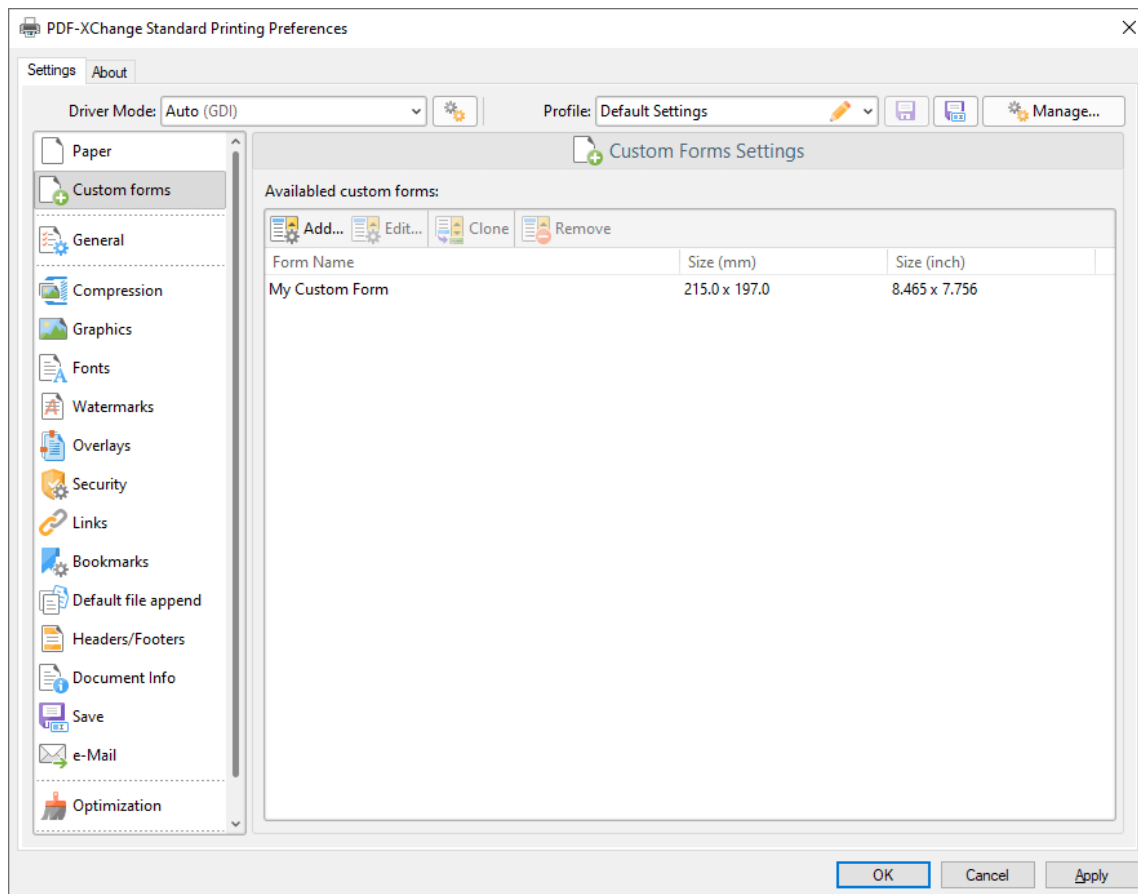
Figure 1. Custom Forms Dialog Box

- Click **Add** to add a new custom form. The **Add/Edit Custom Form** dialog box will open, as detailed below.
- Click **Edit** to edit selected forms.
- Click **Remove** to remove selected forms.
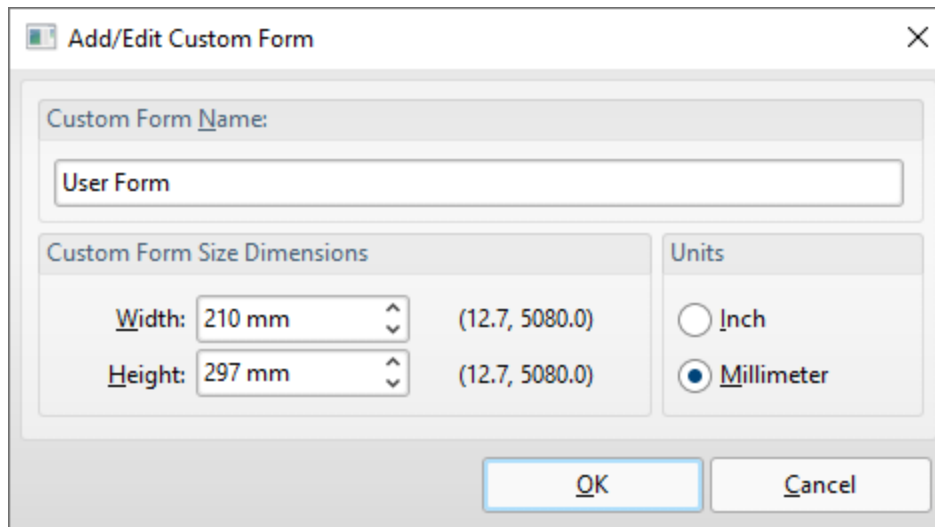
Figure 2. Add/Edit Custom Form Dialog Box

- Enter a name in the **Custom Form Name** text box to name the custom form.
- Enter dimensions in the **Width** and **Height** boxes and select a unit of measurement.

Click **OK** to save custom forms. They will then be detailed in the **Custom Forms** dialog box, and can also be selected in the **Sheet Size** dropdown menu in the **Paper** settings:
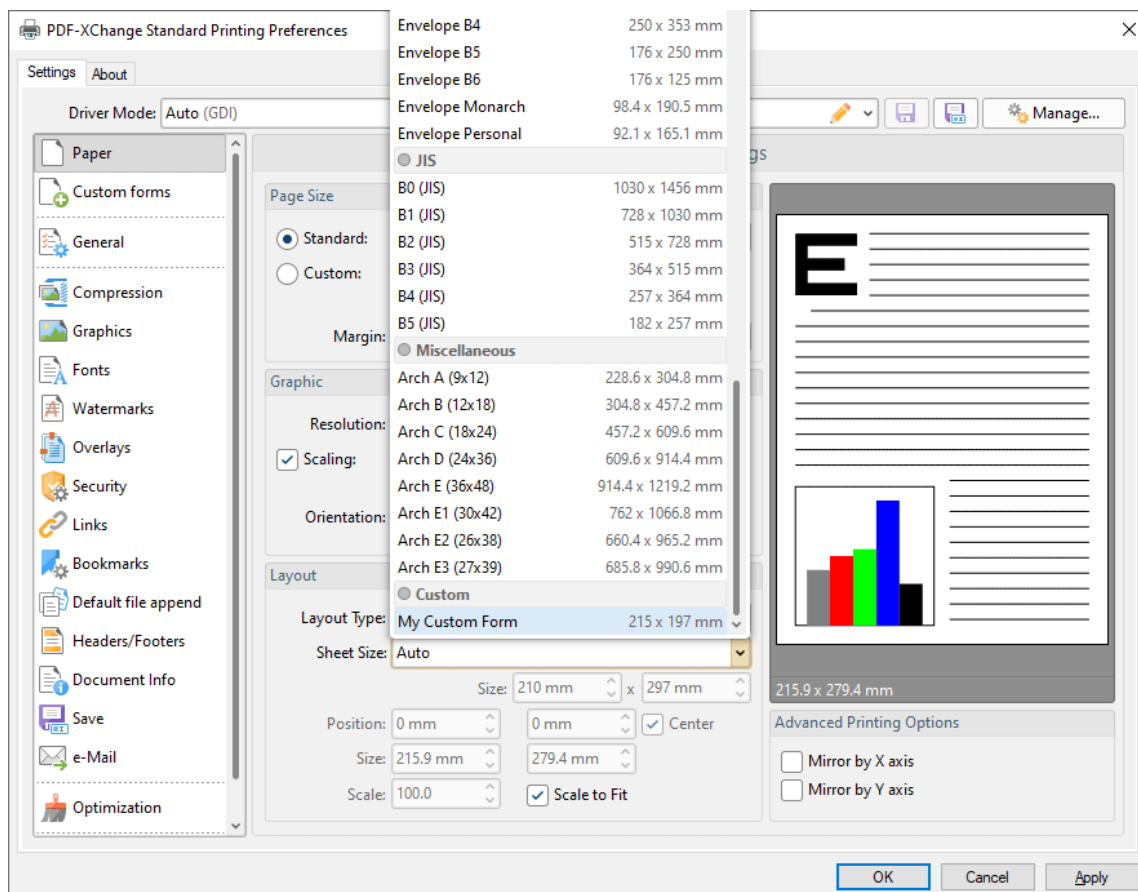
Figure 3. Paper Settings, Sheet Size Dropdown Menu, Custom Forms

3.2.6   **General**

General

The **General** settings determine general document parameters for printed documents:
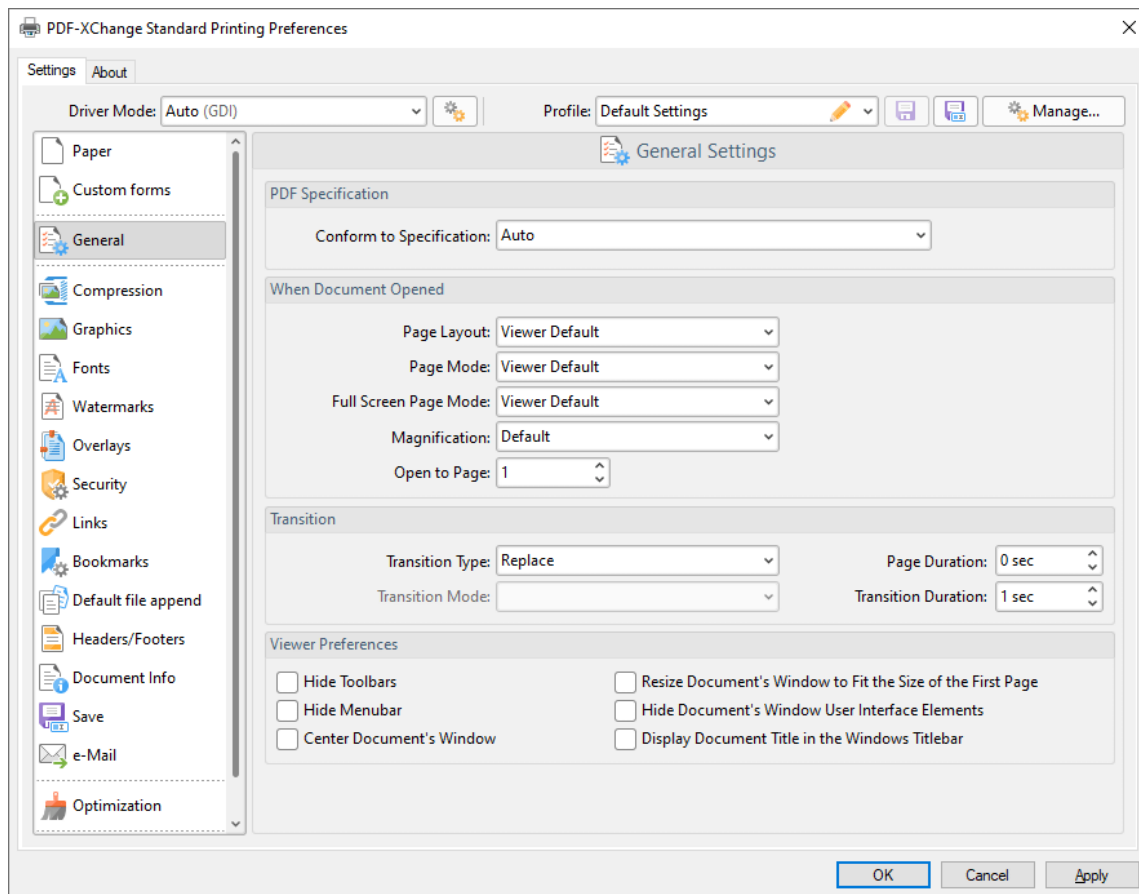
Figure 1. General Settings Dialog Box

- Use the **Conform to Specification** dropdown menu to determine the specification to which printed files conform. These options are detailed in *(figure 2)* below.
- Select an option in the **Page Layout** dropdown menu to determine the page layout when documents are opened:
  - **Viewer Default** sets the page layout to the default settings of the program used to view printed documents.

- **Single Page** displays documents in single whole pages.
- **Continuous** displays documents in single pages continuously, which means consecutive pages can be viewed at the same time when scrolling.
- **Two Columns (Cover Page)** displays the first page as a cover page and displays the remaining pages in two columns.
- **Two Columns** displays documents in two columns.
- **Two Pages (Cover Page)** displays the first page as a cover page and displays the remaining pages two pages at a time.
- **Two Pages** displays documents two pages at a time.
- Select an option in the **Page Mode** dropdown menu to determine which document elements are displayed when documents are opened:
  - **Viewer Default** displays documents in the default mode of the program used to view printed documents.
  - **Pages view only** displays only the document pages.
  - **Show Bookmarks Pane** displays only document pages and the **Bookmarks** pane.
  - **Show Thumbnails Pane** displays only document pages and the **Thumbnails** pane.
  - **Show Layers Pane** displays only document pages and the **Layers** pane.
  - **Show Attachments Pane** displays only document pages the **Attachments** pane.
  - **Full Screen** displays documents in full screen mode.
- Select an option in the **Full Screen Page Mode** dropdown menu to determine which document elements are displayed when documents are opened in full screen mode. Please note that these settings are applicable only to PDF viewers that support the display of additional panes when full screen mode is enabled. The following options are available:
  - **Viewer Default** displays documents in the default full screen mode of the program used to view printed documents.
  - **Pages view only** displays only the document pages.
  - **Show Bookmarks Pane** displays only document pages and the **Bookmarks** pane.
  - **Show Thumbnails Pane** displays only document pages and the **Thumbnails** pane.
  - **Show Layers Pane** displays only document pages and the **Layers** pane.
  - **Show Attachments Pane** displays only document pages the **Attachments** pane.
- Select an option in the **Magnification** dropdown menu to determine the level of magnification when printed documents are opened:
  - **Default** displays documents at the default magnification level.
  - **Actual Size** displays documents at their physical size.
  - **Fit Page** fits document pages to the viewer window.
  - **Fit Width** fits documents to match the width of the viewer window.

- **Fit Height** fits documents to match the height of the viewer window.
- Select a numerical option to set it as the zoom level when printed documents are opened.
- Use the **Open to Page** number box to determine the page at which printed documents are opened.
- Select an option in the **Transition** dropdown menu to determine the page transition style when documents are viewed in full screen mode. Use the **Page Duration** number box to determine how long each page remains open.
- Use the **Transition Mode** dropdown menu to determine the transition mode for transition styles that feature multiple modes. Use the **Transition Duration** number box to determine the length of transitions.
- Select boxes in the **Viewer Preferences** section as desired.
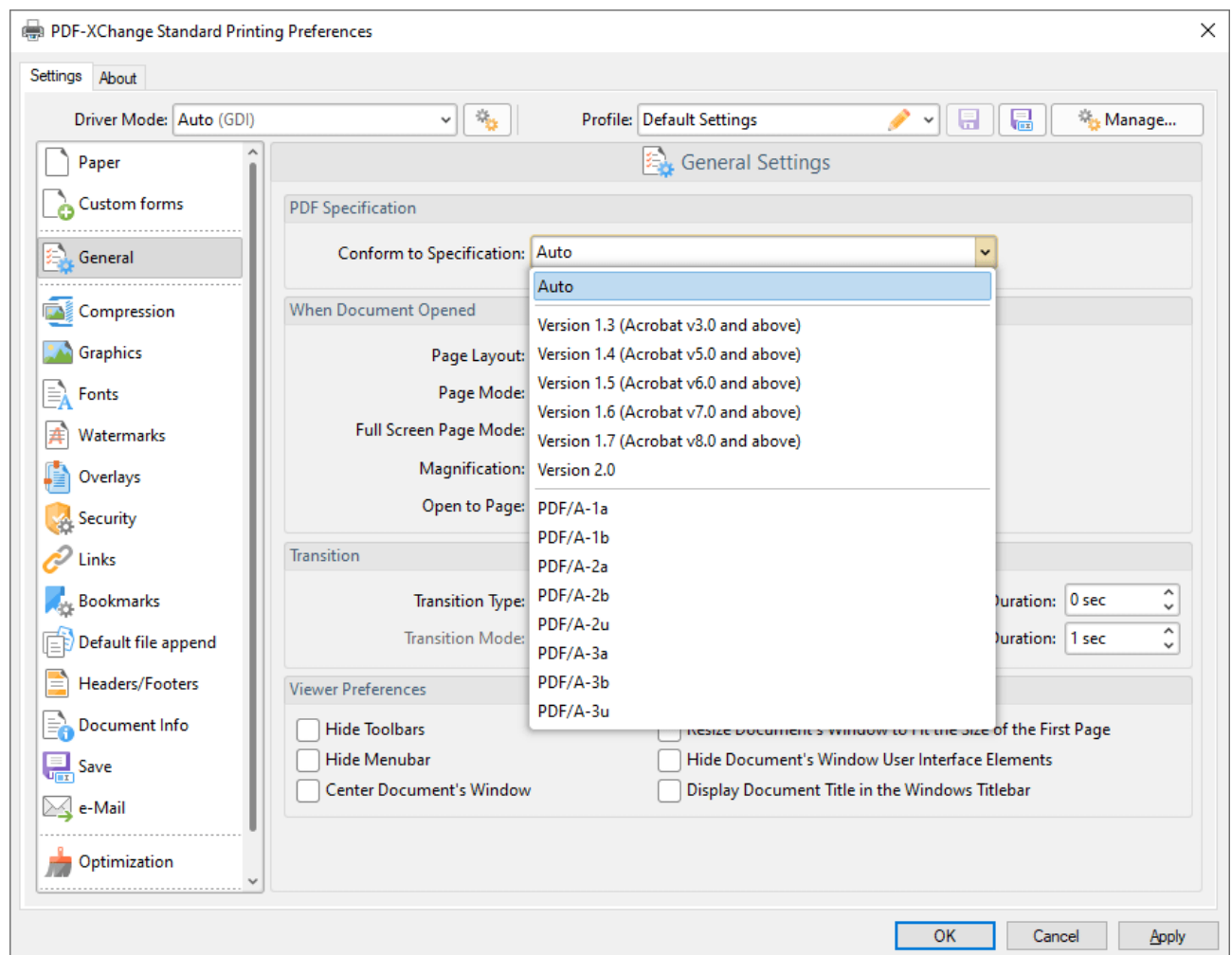
Figure 2. General Setting Dialog Box, Conform to Specification Dropdown Menu Options

- Select **Auto** to enable **PDF-XChange Standard** to select the PDF specification automatically.
- Select an option from **Version 1.3** to **Version 2.0** to set the PDF specification to these versions of the the PDF specification. Further information about specifications is available **here.**

- Select a **PDF/A** option to set the PDF specification to the **PDF/A** format, which is designed for archiving documents. Further information about the **PDF/A** format is available <u>here.</u>

Click **OK** to save changes.

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3.2.7 **Compression**

Compression

The **Compression** settings determine compression parameters for printed documents:
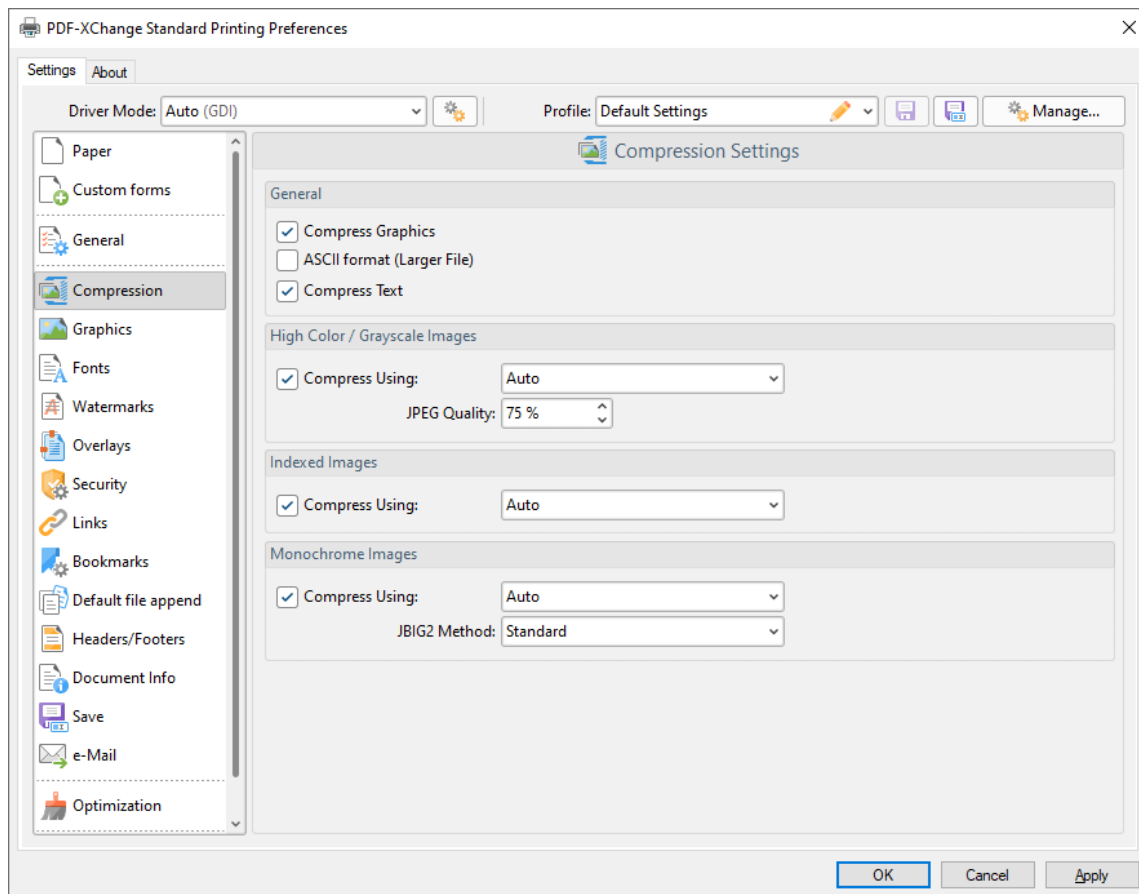
Figure 1. Compression Settings Dialog Box

- Select the **Compress Graphics** box to compress graphics in printed documents. When this box is selected the compression options for **High Color/Grayscale Images, Indexed Images** and **Monochrome Images** are enabled, as detailed below.
- Select the **ASCII format (Larger File)** to compress printed documents to **ASCII** character encoding.

- Select the **Compress Text** box to compress document text.

High Color / Grayscale Images

- Select the **Compress Using** text box to enable compression for images of these formats, and then use the dropdown menu to determine the type of compression.
- Use the **JPEG Quality** number box to determine the JPEG quality for high color/grayscale images.

Indexed Images

Select the **Compress Using** text box to enable compression for indexed images, and then use the dropdown menu to determine the type of compression.

Monochrome Images

- Select the **Compress Using** text box to enable compression for monochrome images, and then use the dropdown menu to determine the type of compression.
- Use the **JBIG2 Method** dropdown menu to determine the method of **JBIG2** compression used.

Click **OK** to save changes.

3.2.8   Graphics

Graphics

The **Graphics** settings are used to determine downsampling and conversion options for graphics in printed documents:
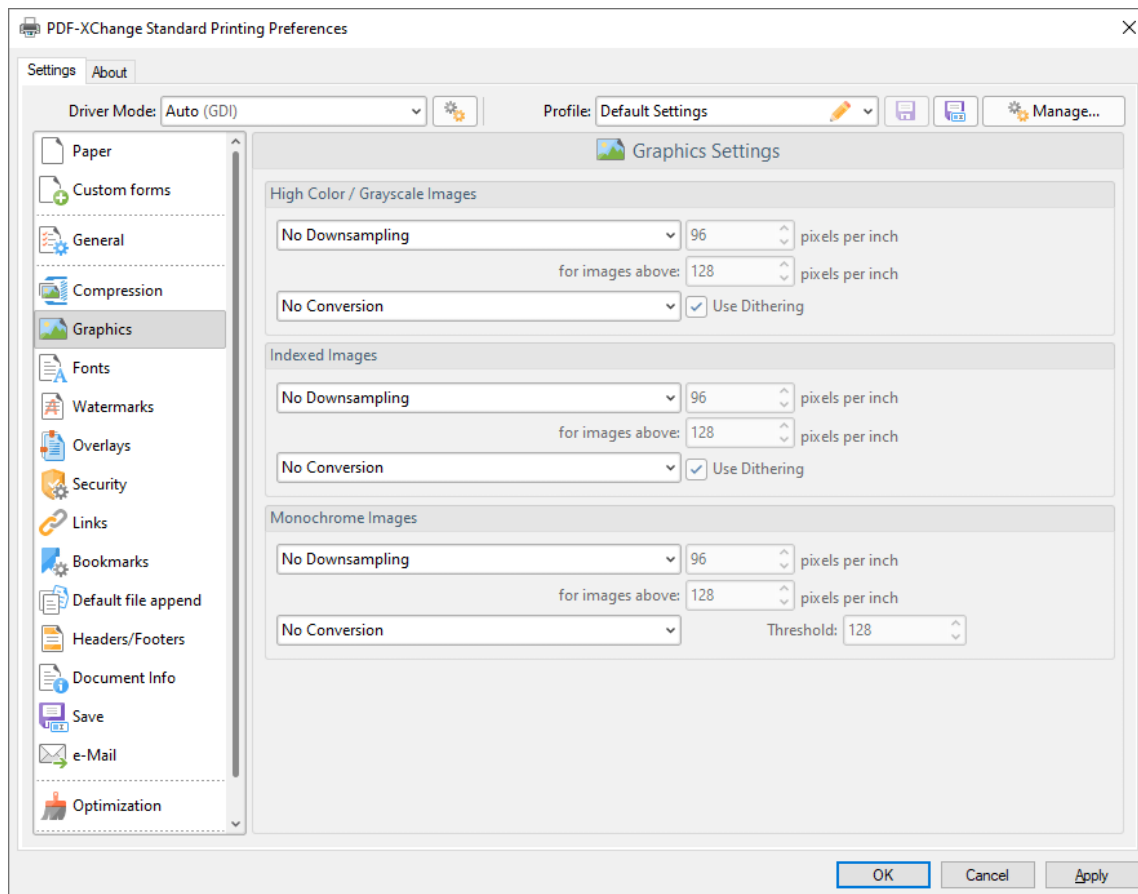
Figure 1. Graphics Settings Dialog Box

High Color / Grayscale Images

- Use the upper dropdown menu to determine downsampling options for high color/grayscale images:
    - Select **No Downsampling** to disable downsampling.

- Select **Linear, Bilinear** or **Bicubic** or enable these downsampling formats.
- Use the upper number box to determine the resolution to which images are downsapled.
- Use the lower number box to determine the minimum resolution at which images are downsampled.
- Use the lower dropdown menu to determine the format to which high color/grayscale images are converted. Select the **Use Dithering** box as desired.

Indexed Images

- Use the upper dropdown menu to determine downsampling options for indexed images:
  - Select **No Downsampling** to disable downsampling.
  - Select **Linear, Bilinear** or **Bicubic** or enable these downsampling formats.
  - Use the upper number box to determine the resolution to which images are downsapled.
  - Use the lower number box to determine the minimum resolution at which images are downsampled.
- Use the lower dropdown menu to determine the format to which high indexed images are converted. Select the **Use Dithering** box as desired.

Monochrome Images

- Use the upper dropdown menu to determine downsampling options for monochrome images:
  - Select **No Downsampling** to disable downsampling.
  - Select **Linear, Bilinear** or **Bicubic** or enable these downsampling formats.
  - Use the upper number box to determine the resolution to which images are downsapled.
  - Use the lower number box to determine the minimum resolution at which images are downsampled.
- Use the lower dropdown menu to determine the format to which high monochrome images are converted. Use the **Threshold** number box to determine the threshold in cases where monochrome images are converted to black and white. Pixels of a value higher than the value entered in this box will be converted to white and all other pixels will be converted to black.

Click **OK** to save changes.

3.2.9 **Fonts**

Fonts

The **Fonts** settings are used to determine font embedding options in printed documents:
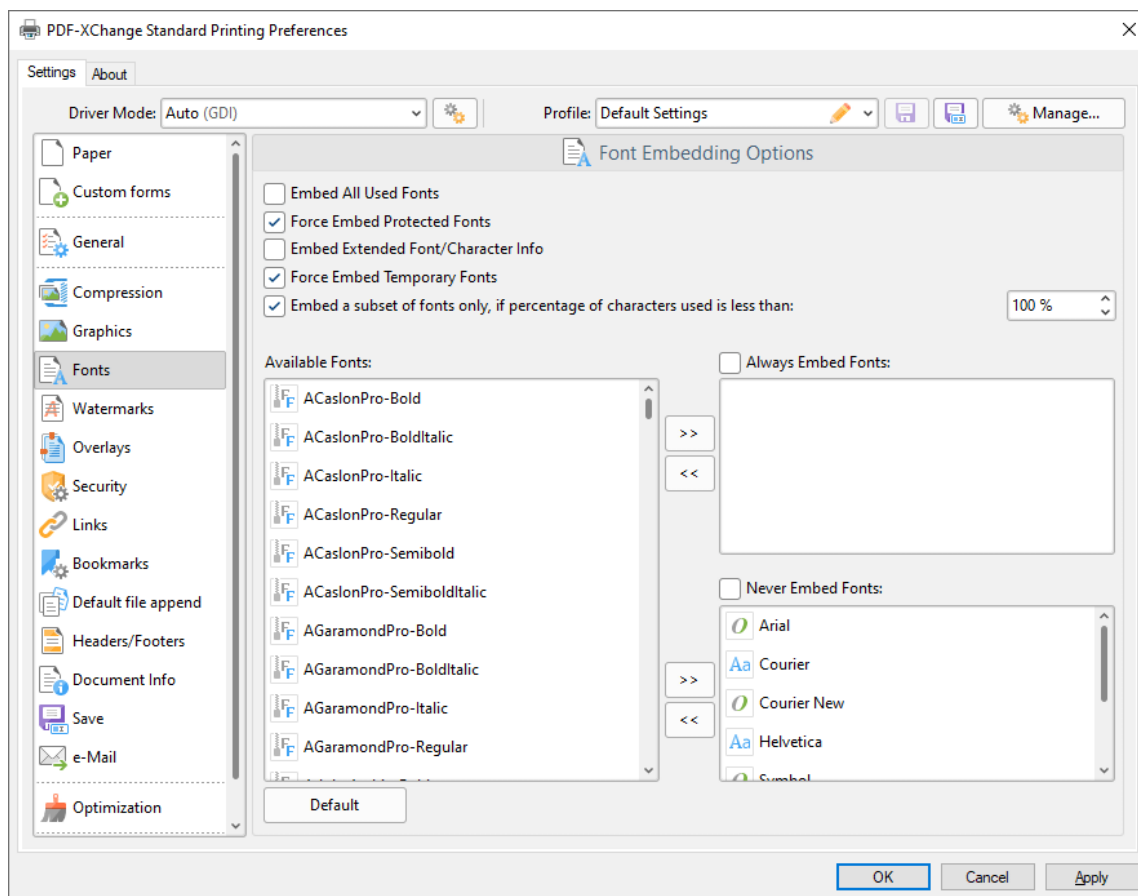
Figure 1. Fonts Settings Dialog Box

- Select the **Embed All Used Fonts** box to embed all fonts. This increases the file size but ensures that fonts can be viewed on all machines.
- Select the **Force Embed Protected Fonts** box to force the inclusion of protected fonts in documents. Please note that some fonts are not licensed for widespread distribution and therefore it is necessary to check license permissions when this option is used.

- Select the **Embed Extended Font/Character Info** box to embed extended fonts and character information.
- Select the **Force Embed Temporary Fonts** box to force the inclusion of temporary fonts in documents.
- Select the **Embed a subset of fonts only, if percentage of characters used is less than** box to embed a subset of fonts when the percentage of total fonts they represent in files is less than the percentage entered into the adjacent number box. This optimizes the size of files as it saves a subset of fonts as opposed to the entire character set, but it should only be used when there is no intention to edit documents subsequently.
- The **Available Fonts** window displays all fonts available for embedding. Select fonts and then use the arrow icons to add them to the **Always Embed Fonts** or **Never Embed Fonts** panes. The best approach, in order to optimize file size, it to embed uncommon fonts and leave common fonts unembedded. This is because it is probable that common fonts will be available on the computers of subsequent users, and therefore embedding these fonts will increase the size of files unnecessarily.

Click **OK** to save changes.

3.2.10 **Watermarks**

Watermarks

The **Watermarks** settings are used to add watermarks to printed documents:
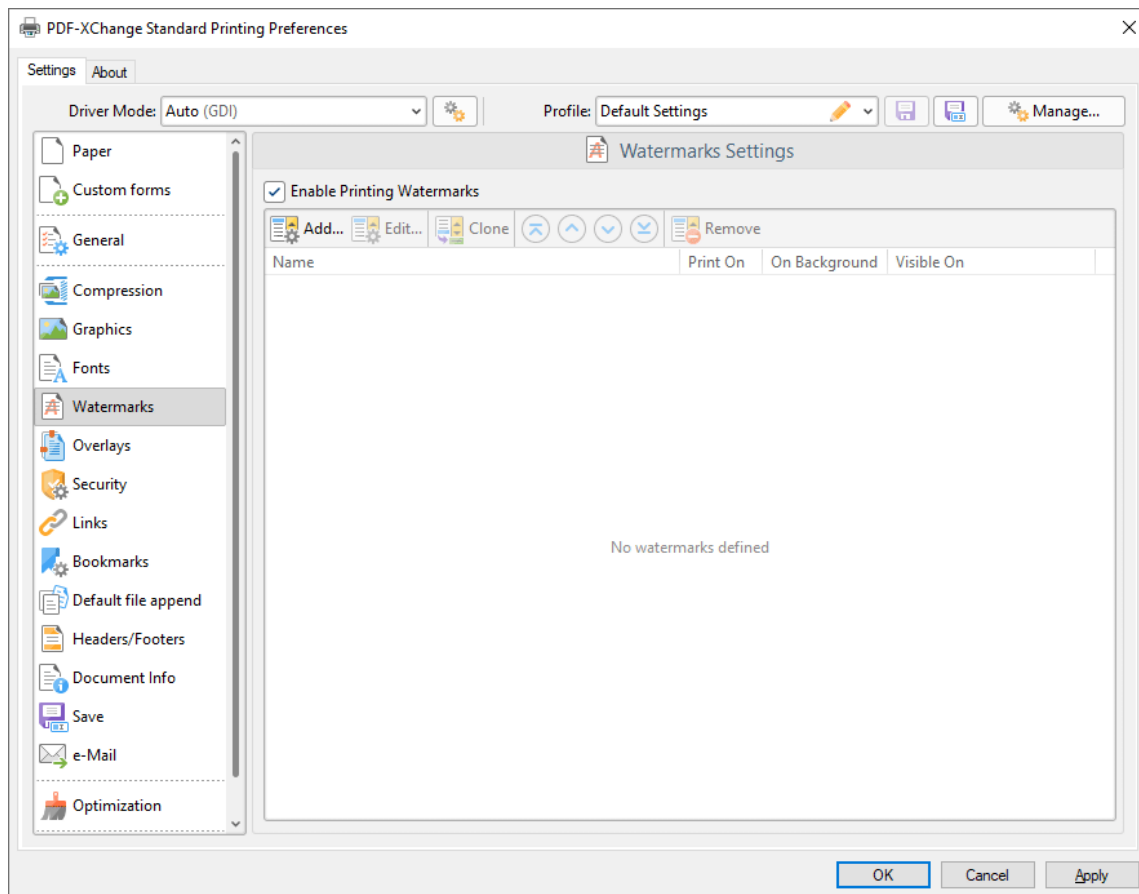
Figure 1. Watermarks Settings Dialog Box

- Select the **Enable Printing Watermark** box to enable watermark printing. Watermarks selected in the watermarks pane will be added when documents are printed. Note that the **Print On, On Background** and **Visible On** columns provide a summary of watermark parameters. Click **Edit** to adjust these parameters, as detailed in *(figure 2)* below.
- Click **Add/Edit** to add/edit watermarks, as detailed in *(figure 2)* below.

- Click **Clone** to clone selected watermarks.
- Click **Remove** to remove selected watermarks.
- Use the blue arrows to adjust the order of watermarks in the list.

Add/Edit Watermark

The options in this dialog box are used to determine the watermark content and style:
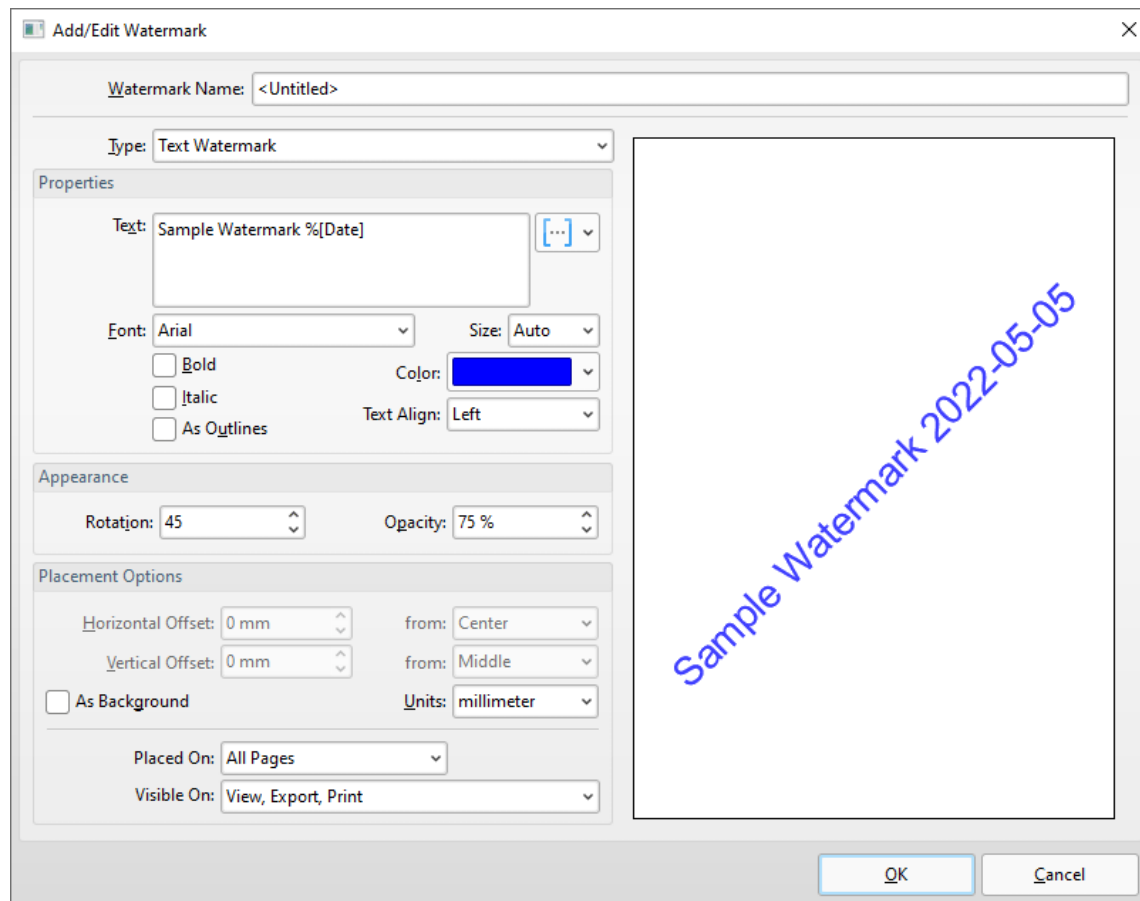
Figure 2. Add/Edit Watermark Dialog Box

- Use the **Watermark Name** text box to edit the watermark name.
- Use the **Type** dropdown menu to select either **Text Watermark** or **Image Watermark** as desired. Note that text and image watermarks feature different sets of properties. The properties for text watermarks are detailed in *(figure 2)* and explained below. The properties for image watermarks are detailed in *(figure 3).*
- Use the **Text** text box to edit the watermark text. Click the blue icon to add **macros** 70 as desired. The sample watermark in *(figure 2)* utilizes the **%[Date]** macro.
- Select an option in the **Font** dropdown menu to edit the watermark font.
- Use the **Size** dropdown menu to determine the size of the watermark font.
- Select the **Bold, Italic** and/or **As Outlines** boxes as desired.

- Use the **Color** dropdown menu to determine the font color.
- Select an option from the **Text Align** dropdown menu to determine the watermark text alignment.
- Use the **Rotation** and **Opacity** number boxes to determine the rotation and transparency of watermarks.
- Use the **Horizontal/Vertical Offset** number boxes to determine the offset of watermarks on the horizontal and vertical axes. Select options in the **from** dropdown menus to determine the location from which offsets are made.
- Select the **As Background box** to add watermarks as backgrounds.
- Use the **Placed On** dropdown menu to determine on which pages watermarks are placed.
- Use the **Visible On** dropdown menu to determine when watermarks are visible.

Image Watermark Properties
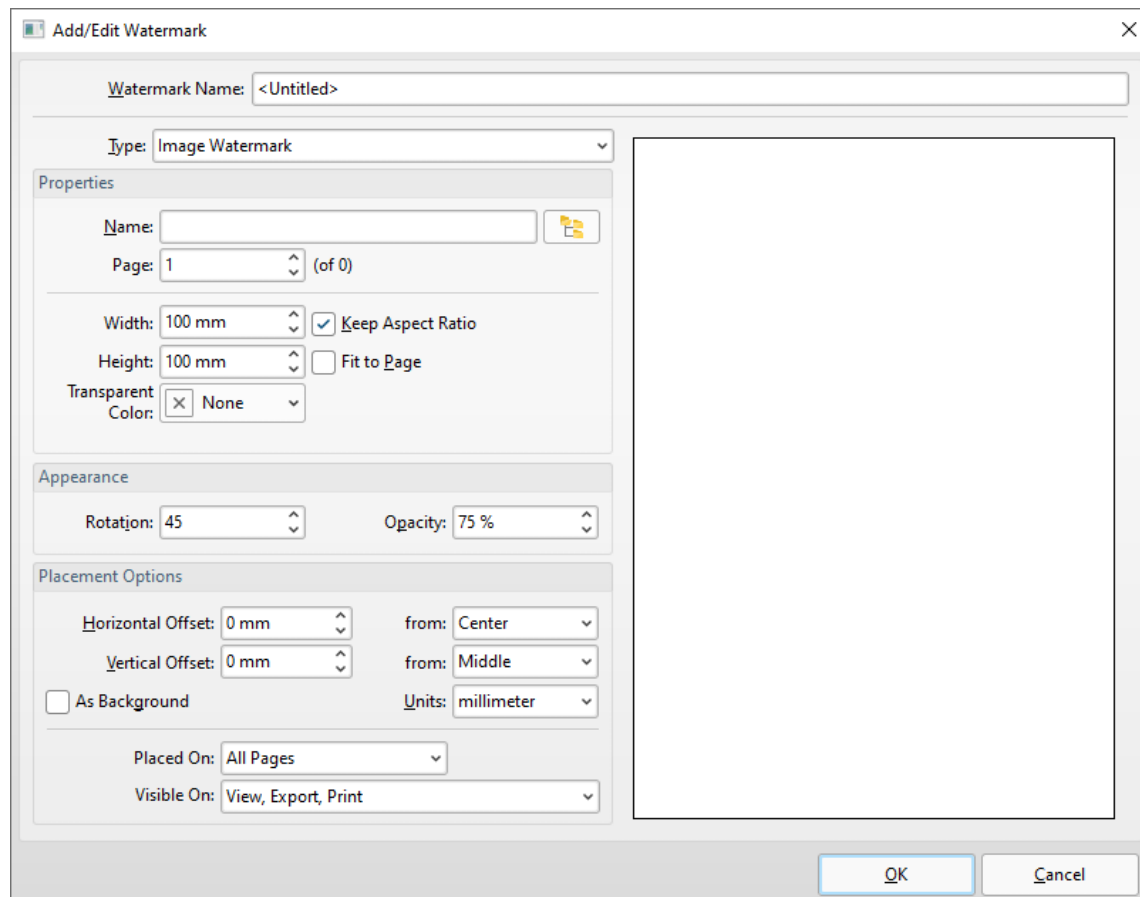
Figure 3. Image Watermark Properties

- Enter the name of the file to be used in the **Name** text box, or click the icon to select a file manually.
- Use the **Page** number box to specify the page number used from the source document to create the watermark.

- Use the **Width** and **Height** number boxes to determine the width and height of the watermark.
- Select the **Keep Aspect Ratio** box to retain the aspect ratio of the image.
- Select the **Fit to Page** box to fit the image to the dimensions of the page on which it is printed.
- Use the **Transparent Color** dropdown menu to determine the color of transparent elements of watermarks.

The remaining options in this dialog box are detailed beneath *(figure 2)* above.

Click **OK** to save watermarks.

3.2.11   **Overlays**

Overlays

The **Overlays** settings are used to overlay printed documents with existing documents:
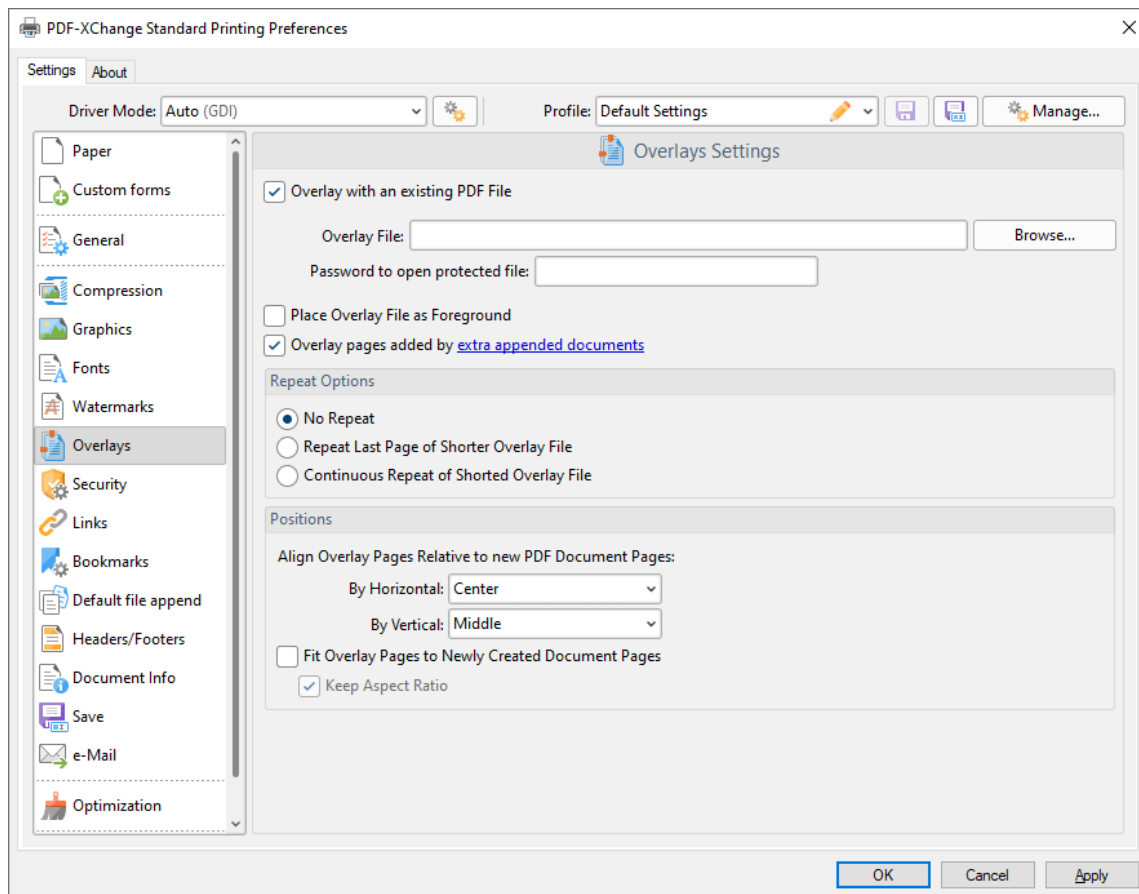
Figure 1. Overlays Settings Dialog Box

- Select the **Overlay with an existing PDF File** box to overlay printed documents.
- Enter the name of the overlay file in the **Overlay File** text box, or click **Browse** to select a file manually.
- If selected files are password protected then enter the password in the **Password to open protected file** text box.

- Select the **Place Overlay File as Foreground** box to place overlays in the foreground of printed documents.
- Select the **Overlay pages added by extra appended documents** to also overlay pages added with the **Default File Append** 151 feature.
- The **Repeat Options** determine the outcome when there are fewer pages in the overlay document than the printed document:
  - Select **No Repeat** to not repeat the overlay document. Pages in the printed document that exceed the range of the overlay document will not feature an overlay.
  - Select **Repeat Last Page of Shorter Overlay File** to repeat the final page of the overlay document on the pages of the printed document that exceed the range of the overlay document.
  - Select **Continuous Repeat of Shorter Overlay File** to repeat the overlay document from its first page on the pages of the printed document that exceed the range of the overlay document.
- Use the **Positions** settings to determine the placement of overlay files relative to printed documents:
  - Select an option from the **By Horizontal** dropdown menu to determine the horizontal position.
  - Select an option from the **By Vertical** dropdown menu to determine the vertical position.
- Select the **Fit Overlay Pages to Newly Created Document Pages** box to fit overlay pages to the page size of printed documents.
- Select the **Keep Aspect Ratio** box to retain the aspect ratio of overlays when the **Fit Overlay Pages to Newly Created Document Pages** option is used.

Click **OK** to save changes.

3.2.12   Security

Security

The **Security** settings are used to add/edit document passwords and permission settings in printed documents:
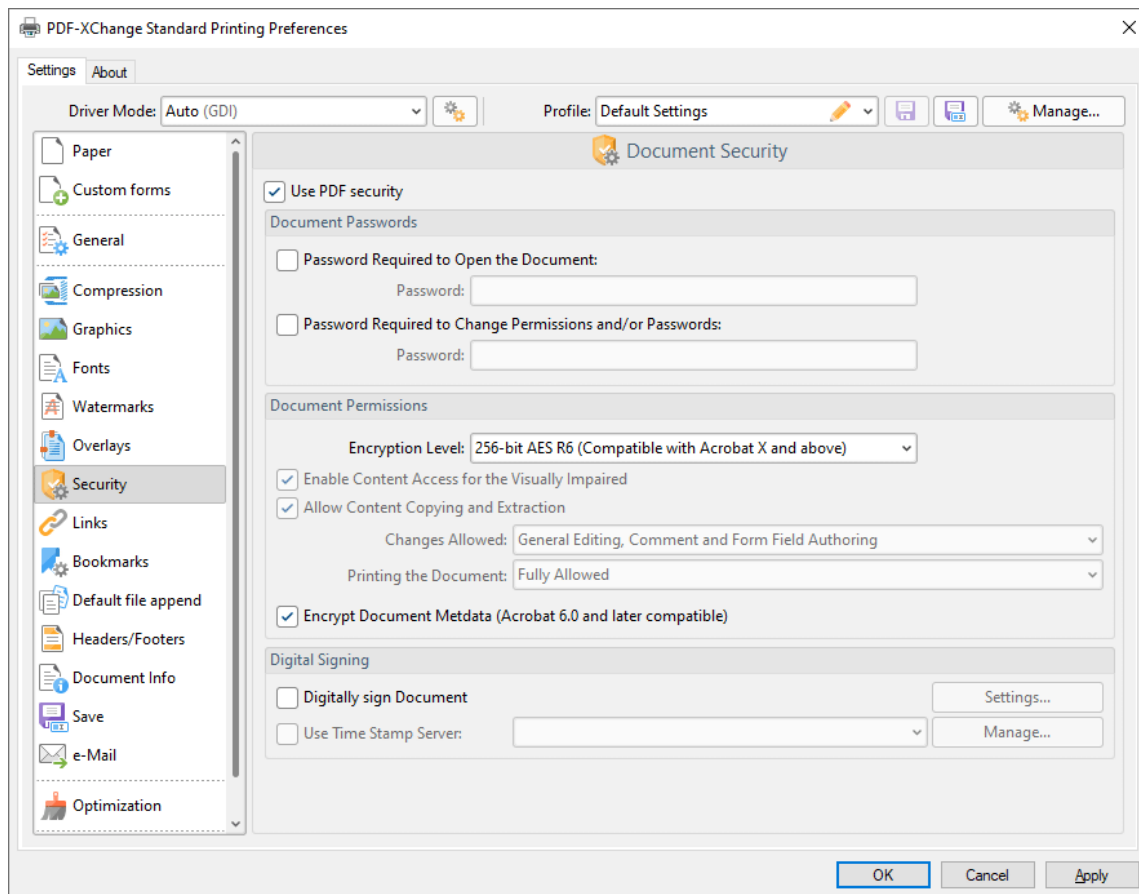
Figure 1. Security Settings Dialog Box

- Select the **Use PDF security** box to add passwords and permissions settings to printed documents.
- Select the **Password Required to Open the Document** box to set a document password, then enter the password in the **Password** text box.

- Select the **Password Required to Change Permissions and/or Passwords** box to set a password for changing the permission settings and/or passwords of printed documents, then enter the password in the **Password** text box.
- Select an option from the **Encryption Level** dropdown menu to determine the encryption level of printed documents.
- Select the **Document Permissions** check boxes to set permissions as desired.
- Select the **Digitally sign Document** box to add a digital signature to printed documents. Click **Settings** to determine digital signature settings. The **Digital Signature** dialog box will open, as detailed in *(figure 4)* below.
- Select the **Use Timestamp Server** box to include time stamp verification in digital signatures. Click **Manage** to add/view/edit time stamp servers. The **Time Stamp Servers List** dialog box will open:
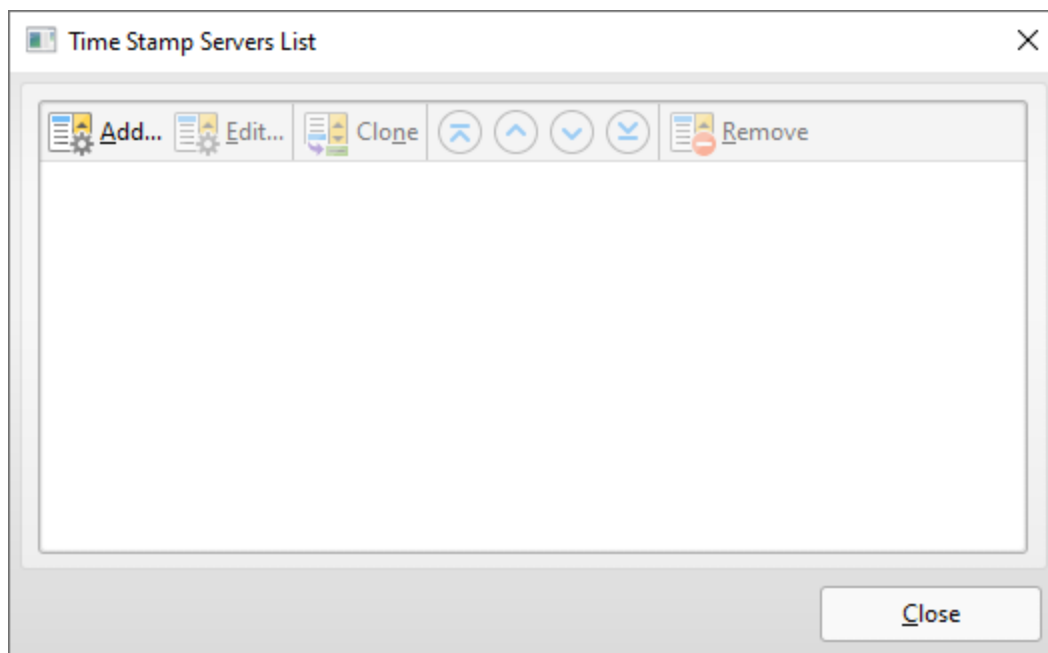
Figure 2. Time Stamp Servers List Dialog Box

Added time stamp servers are detailed in the dialog box. Click to select time stamp servers. Click **Add/Edit** to add/edit time stamp servers. The **Time Stamp Server** dialog box will open:
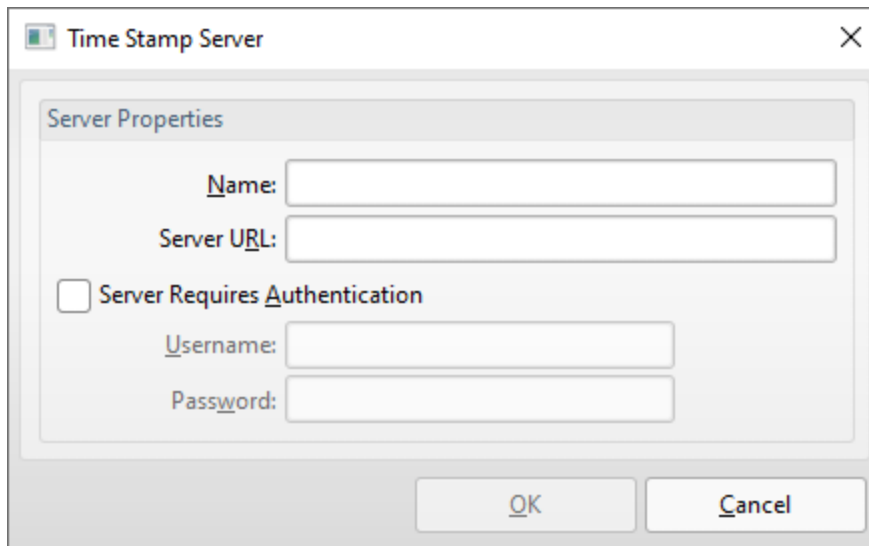
Figure 3. Time Stamp Server Dialog Box

- Use the **Name** text box to add/edit the name of time stamp servers.
- Use the **Server URL** text box to add/edit the URL of time stamp servers.
- If it is necessary to log in to the time stamp server then select the **Server Requires Authentication** box and enter the login details in the **Username** and **Password** text boxes.

Click **OK** to save time stamp servers.
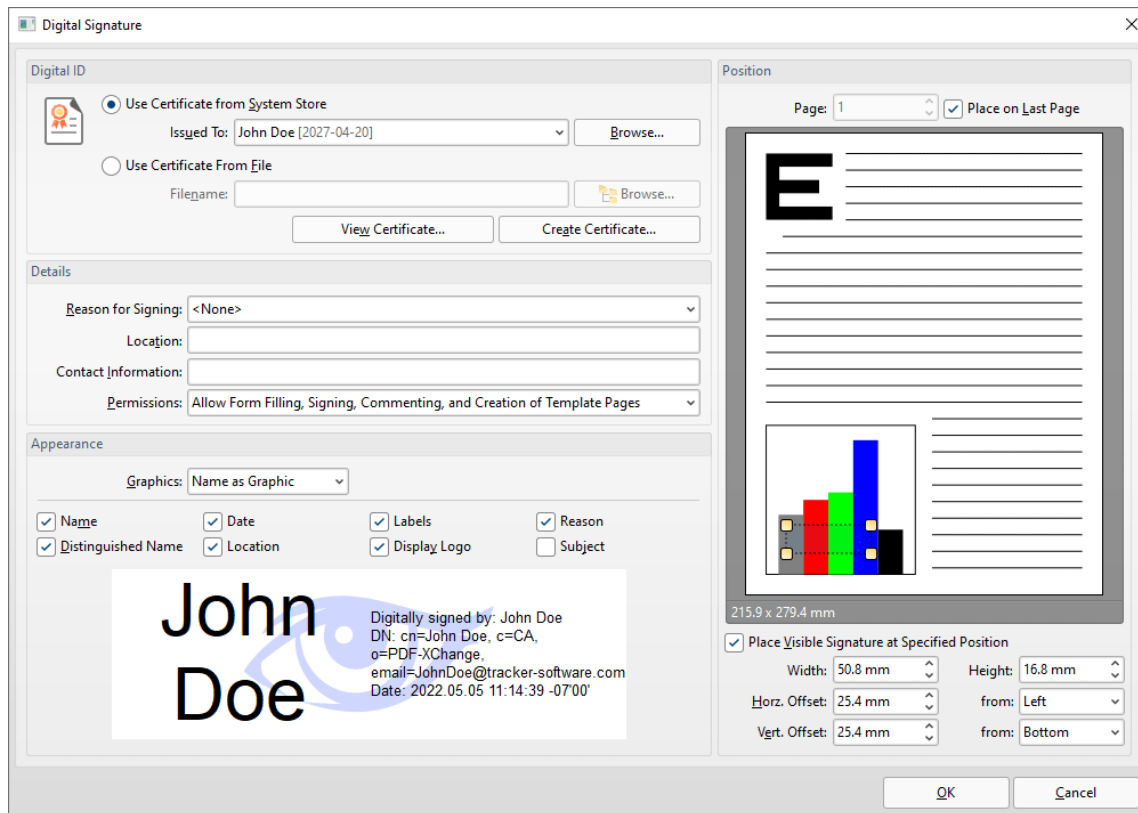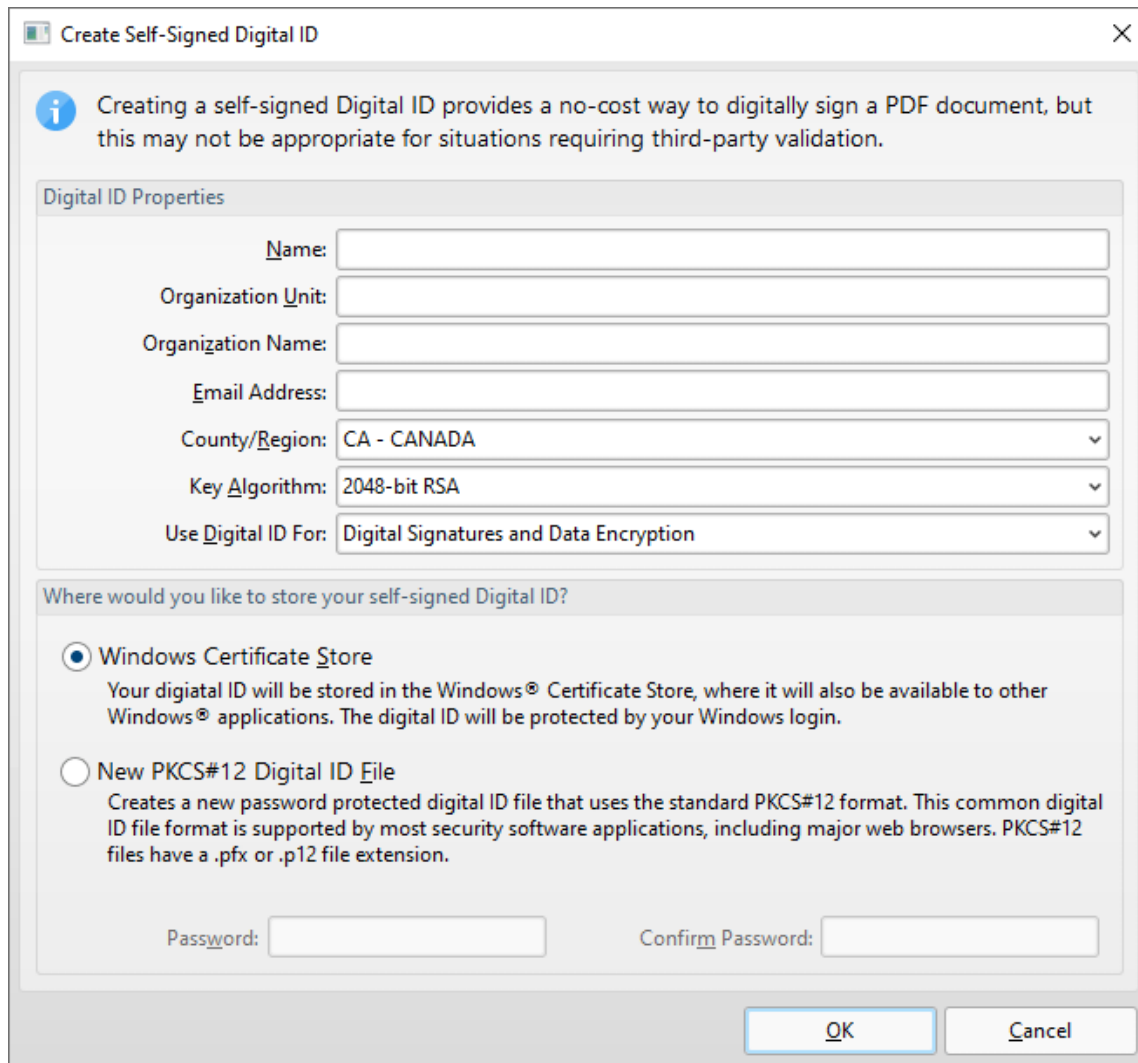
Figure 4. Digital Signature Dialog Box

- Select the **Use Certificate from System Store** option to use a certificate from the system store. Click the dropdown menu to select a certificate, or click **Browse** to select one manually.
- Select the **Use Certificate From File** option to use a certificate saved on the local computer. Enter the filename of the certificate in the **Filename** text box, or click **Browse** to select a certificate manually.
- Click **View Certificate** to view selected certificates.
- Click **Create Certificate** to create new certificates, as detailed in *(figure 5)* below.
- Use the **Details** options to edit digital signature details:
  - Select an option in the **Reason for Signing** dropdown menu to add a reason for signing the document.
  - Use the **Location** and **Contact Information** text boxes to add a location and/or contact information as desired.
  - Select an option in the **Permissions** dropdown menu to determine permissions in printed documents as desired.
- Use the **Appearance** options to determine the appearance of digital signatures:
  - Select an option from the **Graphics** dropdown menu to determine the graphical element of digital signatures:
    - Select **No Graphic** to omit the graphical element of the digital signature.

- Select **Name as Graphic** to use the name of the signer as the graphic for the digital signature.
- Select **Image from File** to select a file manually, then click the ellipsis icon on the right of the text box to select an image.
- Select the **Appearance** check boxes to determine the details displayed with the digital signature as desired.
- Use the **Position** pane to determine the size and location of digital signatures:
  - Use the **Page** number box to determine the page on which the digital signature is placed, or select the **Place on Last Page** to place signatures on the last page of printed documents.
  - Select the **Place Visible Signature at Specified Position** box to add a visible signature, then use the number boxes to specify the position of signatures in printed documents. Alternatively, click and drag the bounding box in the image preview to place digital signatures manually. Click and drag the yellow control points to change the dimensions of the digital signature field.

Create Certificate

Figure 5. Create Self-Signed Digital ID Dialog Box

- Enter the desired details of the new digital ID in the **Name, Organization Unit, Organization Name** and **Email Address** text boxes.
- Select the desired country from the **Country/Region** dropdown menu.
- Select a key algorithm in the **Key Algorithm** dropdown menu.
- Select an option in the **Use Digital ID For** dropdown menu to determine how the digital ID will be used.
- Select either **Windows Certificate Store** or **NewPKCS#12 Digital ID File** for the location at which the digital ID is saved. If the **NewPKCS#12 Digital ID File** option is used, then enter and confirm a password for the digital ID in the text boxes.

Click **OK** to save new digital IDs.

3.2.13 Links

 Links

The **Links** settings are used to determine parameters for URLs in printed documents:
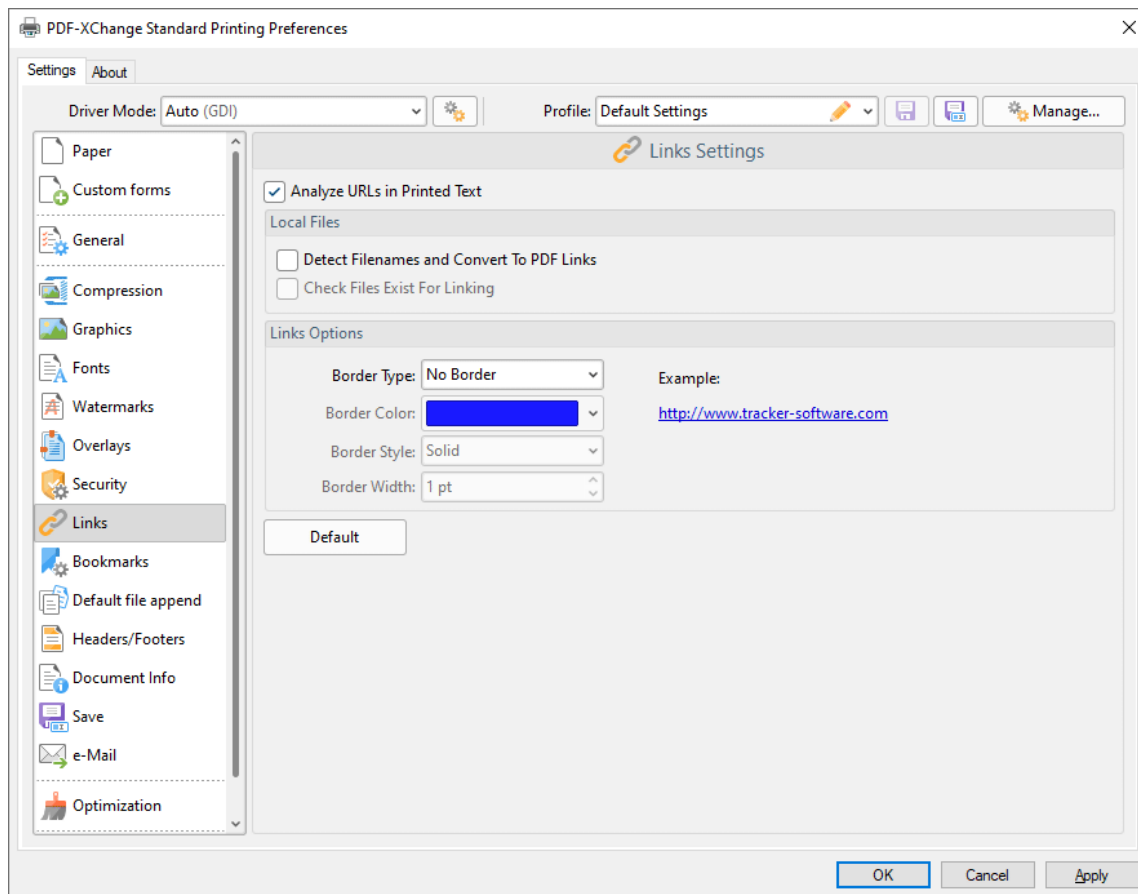
Figure 1. Links Settings Dialog Box

- Select the **Analize URLs in Printed Text** box to enable link detection in printed documents.
- Select the **Detect Filenames and Convert to PDF Links** box to convert filenames into PDF links in printed documents. Note that linked files must be located on the local computer.

- Select the **Check files Exist for Linking** box to ensure that linked files are present when links are created.
- Use the **Links Options** to determine the border **Type, Color, Style** and **Width** as desired.
- The **Links Options** determine the parameters of link features. Use the **Border Type, Color, Style** and **Width** boxes to determine these parameters of links.
- Click **Default** to revert to default settings for links.

Click **OK** to save changes.

3.2.14 **Bookmarks**

Bookmarks

The **Bookmarks** settings are used to determine parameters for bookmarks in printed documents:
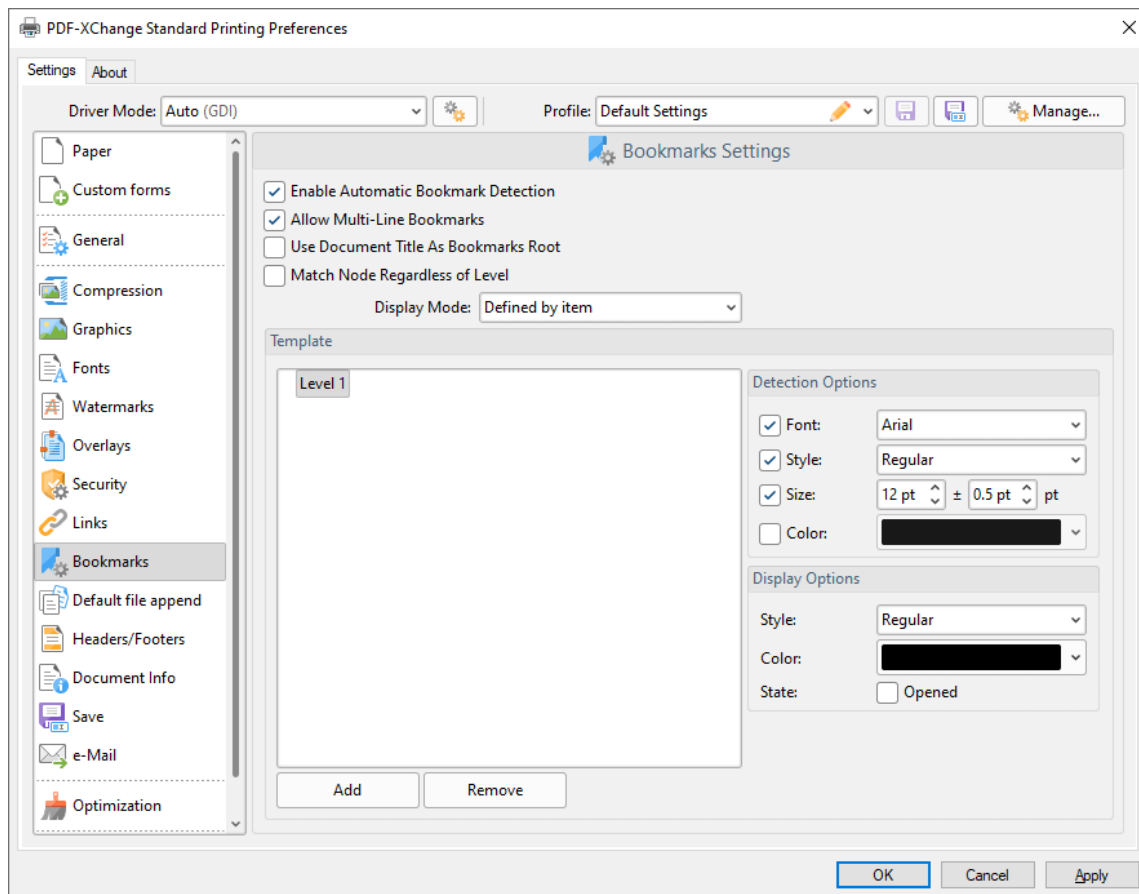
Figure 1. Bookmarks Settings Dialog Box

- Select the **Enable Automatic Bookmarks Detection** box to enable **PDF-XChange Standard** to detect bookmarks automatically in printed documents.
- Select the **Allow Multi-Line Bookmarks** box to allow bookmark titles to exceed a one line in length. This is a useful feature in cases where it is not possible to shorten bookmark titles.

- Select the **Use Document Title As Bookmarks Root** box to use document titles as the root of bookmarks trees.
- Select the **Match Node Regardless of Level** box to link bookmarks irrespective of their location in the bookmarks tree. If this box is cleared then some bookmarks may not be recognized.
- Use the **Display Mode** dropdown menu to determine the initial appearance of bookmark levels:
  - **All opened** expands all levels of the bookmarks tree.
  - **All closed** collapses all levels of the bookmarks tree.
  - **Defined by item** references the **State** box in the **Display Options** settings to determine whether bookmark levels are expanded or collapsed.
  - **Open to Node level** opens bookmarks to the level entered in the **Level** number box, which is displayed when this option is selected.
- The **Template** window displays the bookmark tree template of the current settings. Click **Add/Remove** to add/remove bookmark levels, then use the **Detection** and **Display** options to determine how bookmarks are detected and displayed for each level:
  - Use the **Detection Options** to determine the **Font, Style, Size** and **Colour** of document text to be converted into bookmarks when documents are printed.
  - Use the **Display Options** to determine the **Style** and **Color** of bookmarks in printed documents. Select the **Opened** box to expand the bookmark level when documents are printed.
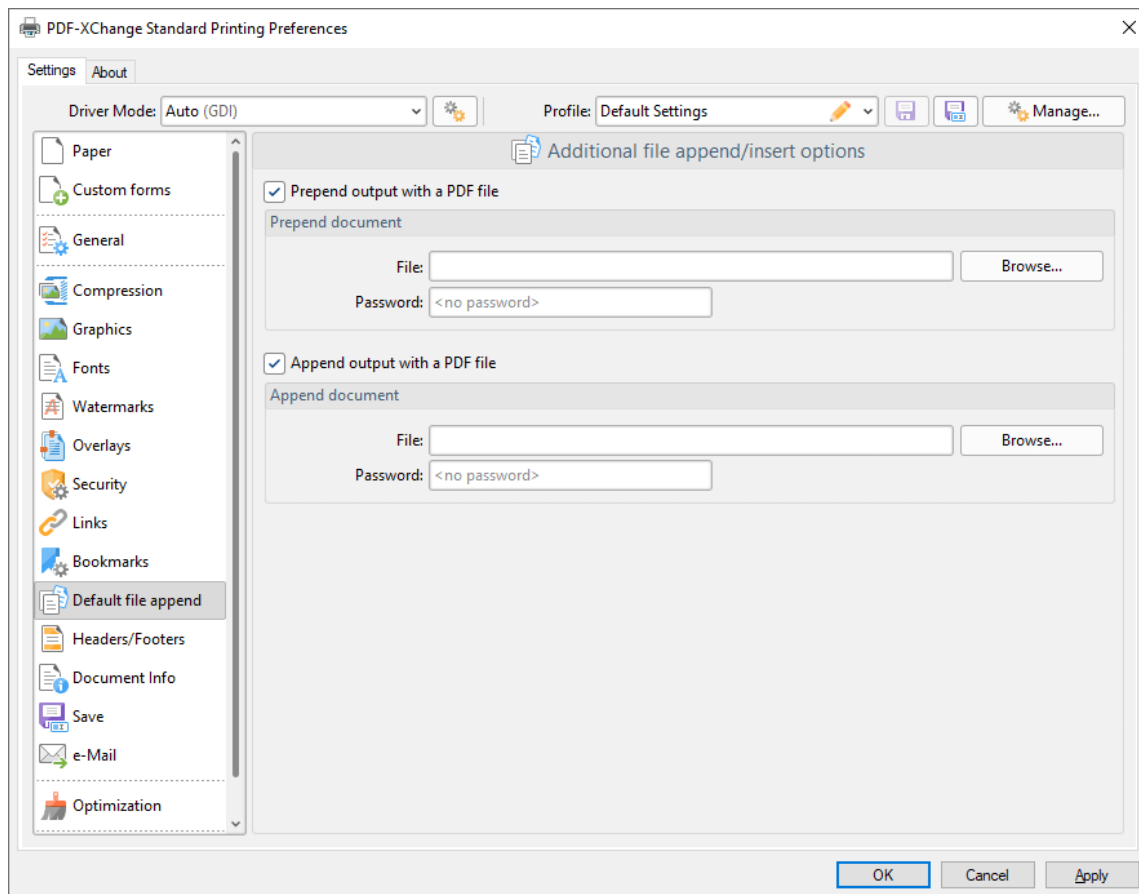
Click **OK** to save changes.

3.2.15 **Default File Append**

Default File Append

The **Default File Append** settings are used to append/prepend printed documents:

Figure 1. Default File Append Options Dialog Box

- Select the **Prepend output with a PDF file** box to insert an existing file at to the beginning of printed documents:
  - Enter the name of the prepending file in the **File** text box, or click **Browse** to select a file manually.
  - If the file is password protected then enter the password in the **Password** text box.

- Select the **Append output with a PDF file** box to insert an existing file at the end of printed documents.
    - Enter the name of the appending file in the **File** text box, or click **Browse** to select a file manually.
    - If the file is password protected then enter the password in the **Password** text box.

Click **OK** to save changes.

3.2.16 **Headers and Footers**

Headers and Footers

The **Headers and Footers** settings are used to add headers and footers to printed documents:
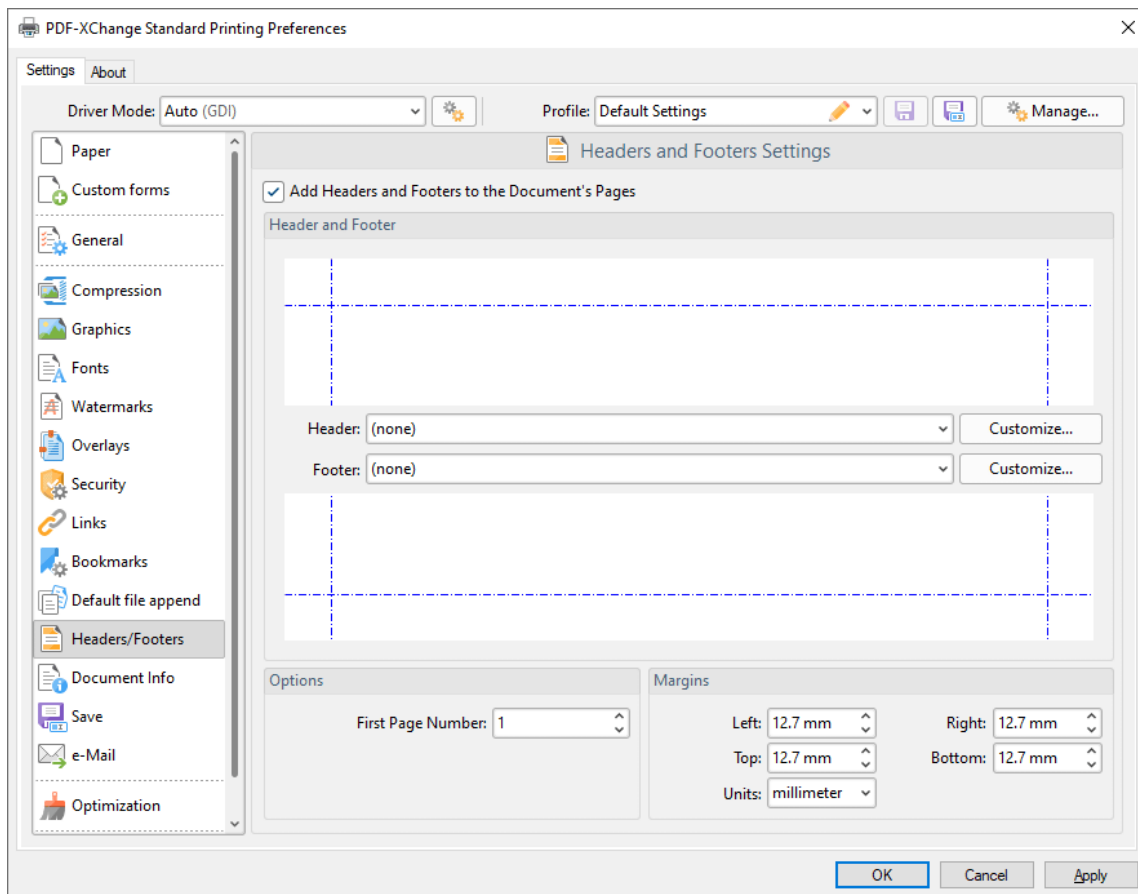
Figure 1. Headers and Footers settings

- Select the **Add Headers and Footers to the Document's Pages** box to enable the headers and footers functionality:
- Use the **Header/Footer** dropdown menus to determine the format of document headers/footers. The following default formats are available:
  - **Page 1** adds the page number of each document page.

- **Page 1 of ?** adds the page number to each document page followed by **"of x"** where **x** is the total number of document pages.
- **Document** adds the title of the document to each document page.
- **Page 1 of ?, <current date>, Page 1** adds the page number of each document page as the left header/footer, the current date as a central header/footer and the page number as the right header/footer.
- **Page 1, C:\My Documents\Document** adds the last section of the full file path.
- **<current user>, Page 1, <current date>** adds the current user as the left header/footer, the page number of each document page as the central header/footer and the current date as the right header/footer.
- **Prepared by <current user> <current date>, Page 1** adds the text "**Prepared by <current user>**" followed with the current date as a central header/footer and the page number of each document page as the right header/footer.

- Click **Customize** to edit the font style of headers/footers and/or add **macros.** [70] The **Customize** dialog box will open, as detailed in *(figure 2).*
- Use the **First Page Number** dropdown menu to determine the first document page that features headers and/or footers in printed documents.
- Use the **Margins** number boxes to determine the margins used for headers and footers. Note that the margins in the preview panes update to reflect any changes made.
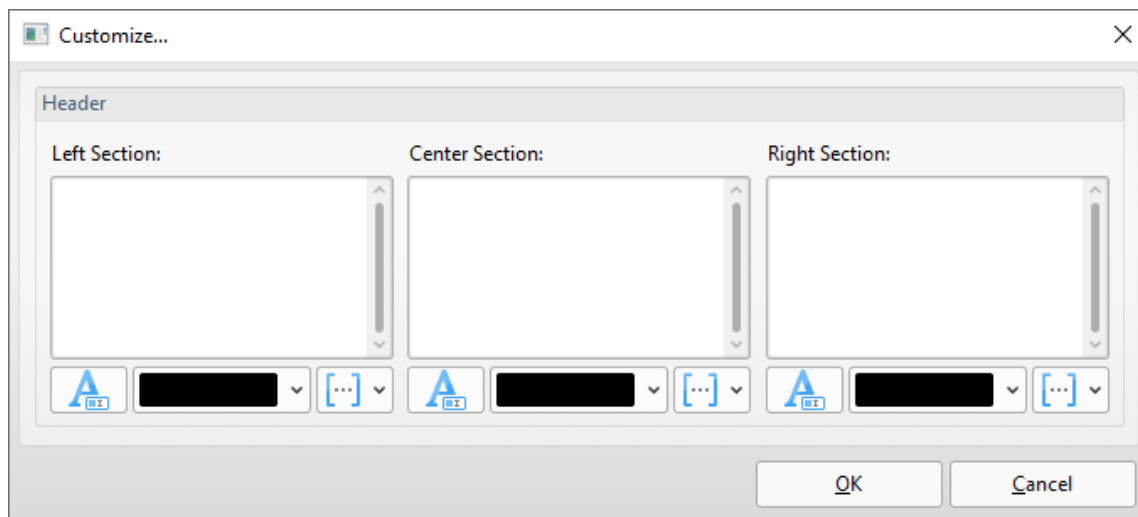

Figure 2. Customize Dialog Box

- Enter text in the **Left Section, Center Section** and **Right Section** panes to determine the text used as left, center and right headers/footers.
- Click the **'T'** icon to edit font parameters.
- Use the color dropdown menus to edit the font color.
- Click the macro dropdown menus to add **macros** [70] to headers/footers.

Click **OK** to save changes.

3.2.17   **Document Info**

Document Info

The **Document Info** settings are used to determine PDF information in printed documents:
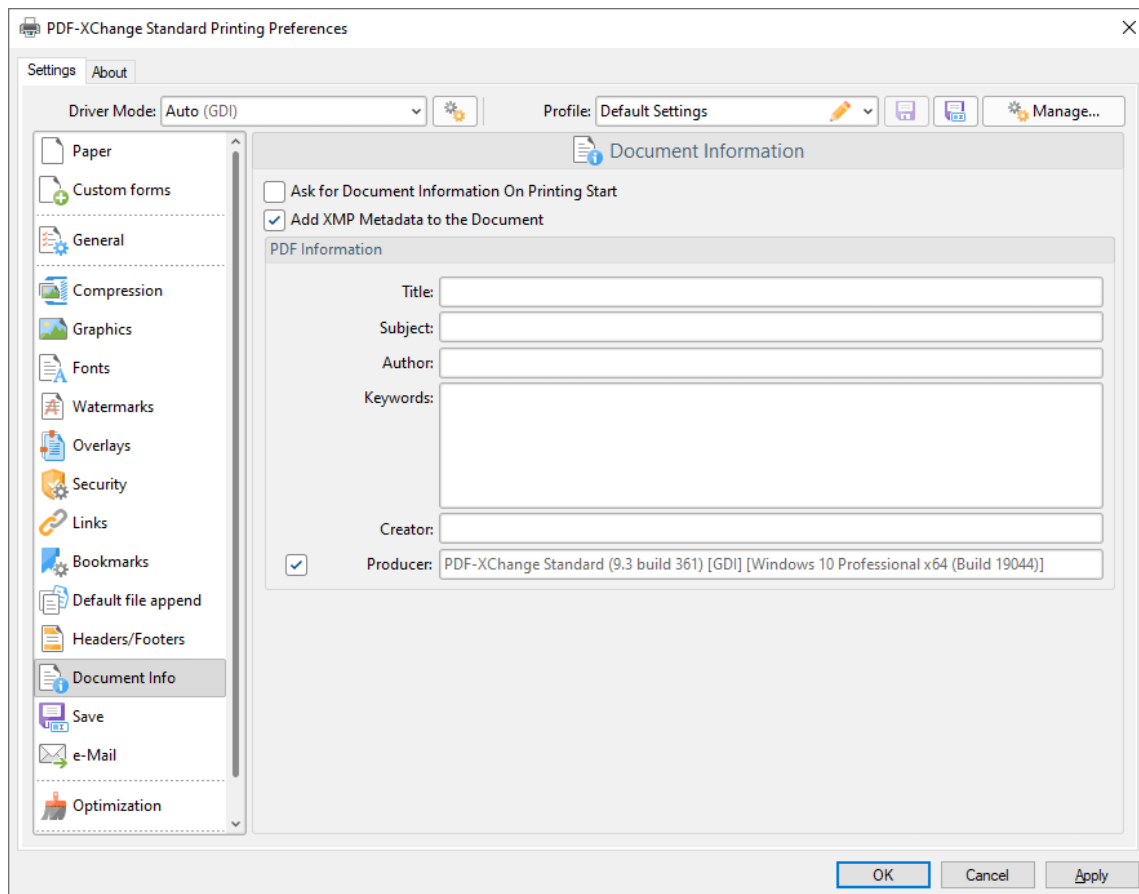

Figure 1. Document Information Dialog Box

- Select the **Place Additional Information Into the Document** box to enable the editing of document information.
- Select the **Ask For Document Information on Printing Start** box to enter document information when documents are printed.
- Select the **Add XMP Metadata to the Document** box to add **(XMP)** information to documents. See **here** for further information.

- Enter data in the **PDF information** text boxes as desired.
- Select the **Producer** box to add the PDF producer to the information of the document, or clear this box to exclude the PDF producer information from the document.

Click **OK** to save changes.

3.2.18 **Save**

Save

The **Save** settings are used to determine how **PDF-XChange Standard** names and saves printed documents:
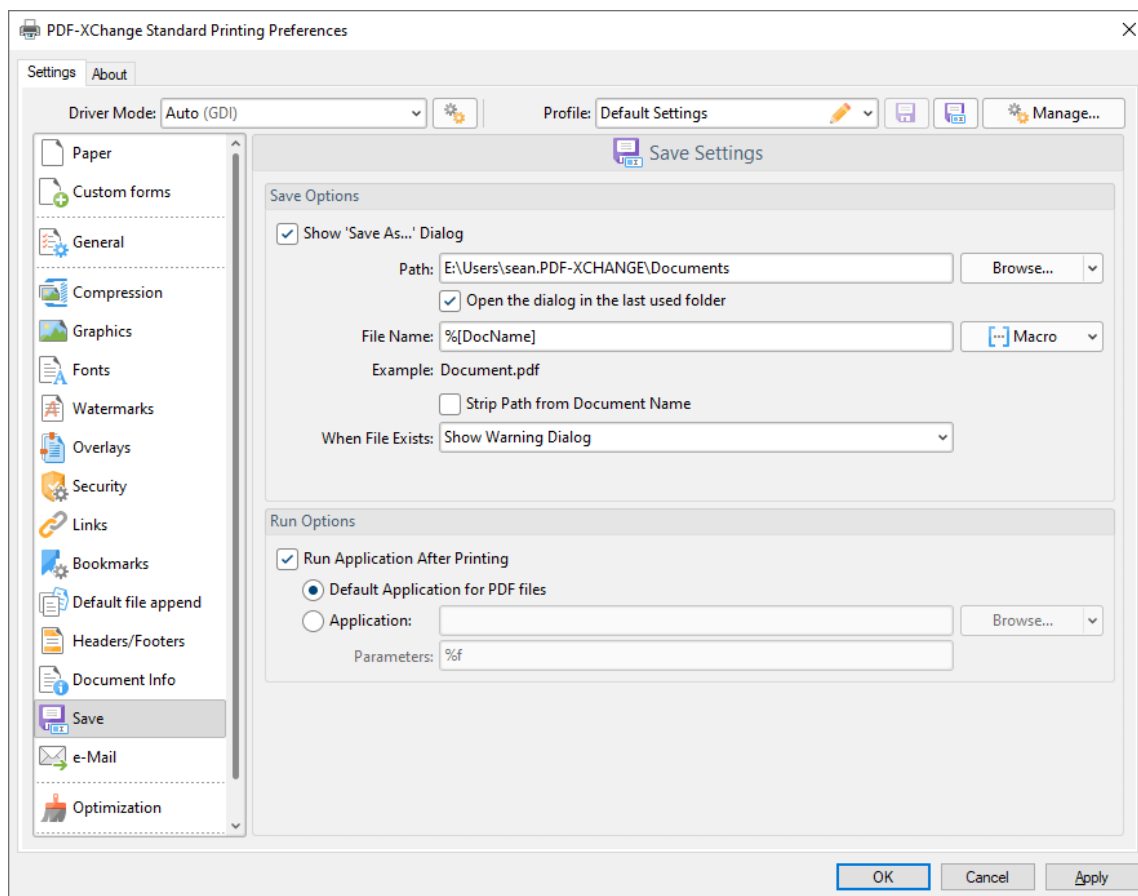
Figure 1. Save Settings Dialog Box

- Select the **Show 'Save As' Dialog** box to launch the save as dialog for printed documents and determine the name/location of saved files. Alternatively, enter the desired path and file name for documents in the **Path** and **File Name** text boxes.
- Click **Browse** to select a save location manually, or use the dropdown arrow to select standard save locations such as the **Desktop** or **My Documents.**

- Click **Macro** to add macros to the file name. Macros are a dynamic way to enhance the flow of input data to output data. The example beneath the text box will update to show the output file name when macros are added to the **File Name** text box. Further information on macros in **PDF-XChange Standard** is available **here.** [70]
- Select the **Strip Path From Document Name** box as desired.
- Select an option in the **When File Already Exists** dialog box to determine the action taken when file names are already in use:
  - **Show Warning Dialog** displays a warning and prompts the user for action.
  - **Always Overwrite** saves the new file over the existing file.
  - **Auto Number** uses the same file name and appends a number to it.
  - **Merge with Existing (Append To)** appends the new file to the existing file.
  - **Merge with Existing (Insert Before)** prepends the new file to the existing file.
  - **Ask for new file name** prompts the user for a new file name.
- Select the **Run Application After Printing** box to view documents immediately after they are printed.
- Select the **Default Application for PDF files** option button to view printed documents in the default PDF viewer of the local computer.
- Select the **Application** option button to view printed documents in an alternative application to the default PDF viewer of the local computer. Enter the name of the application in the **Application** text box, or click **Browse** to select an application manually.
- Use the **Parameters** text box to enter application-specific printing parameters as desired.
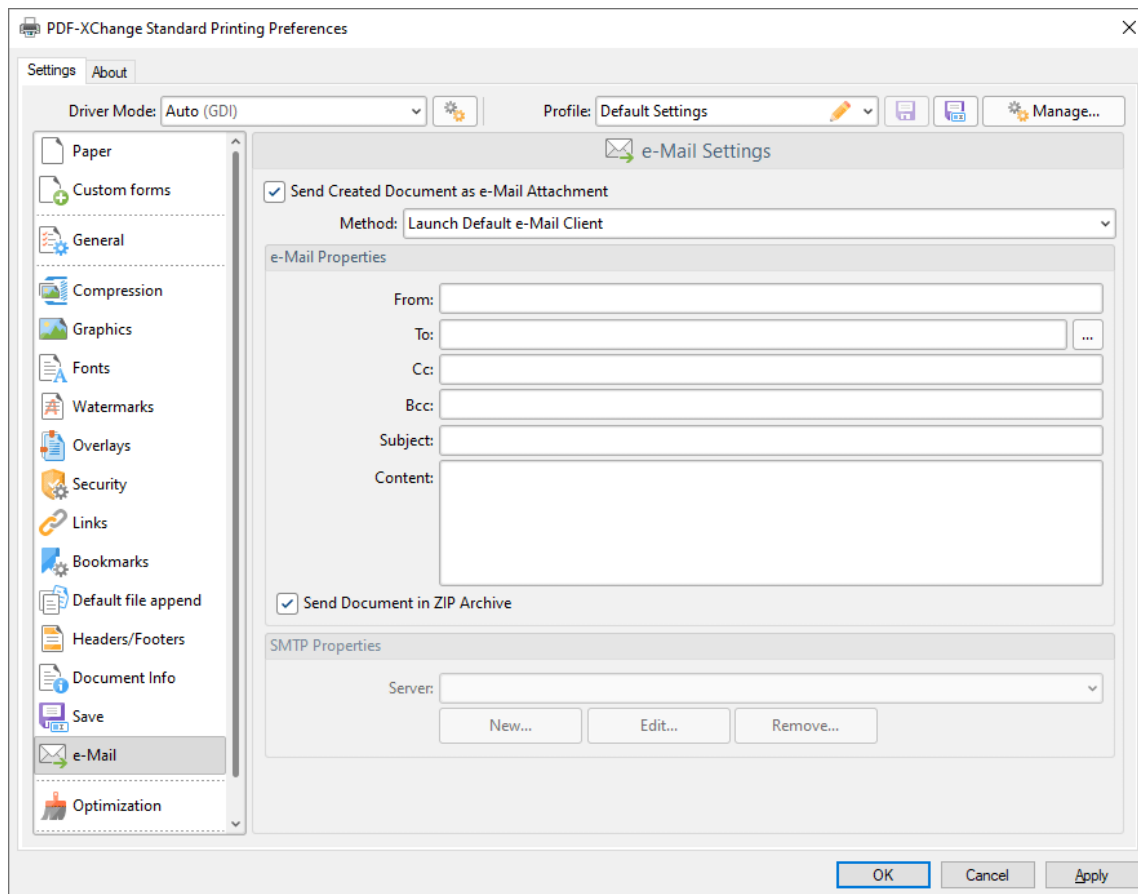
Click **OK** to save changes.

3.2.19 e-Mail

e-Mail

The **e-Mail** settings are used to email printed documents:

Figure 1. Email Settings Dialog Box

* Select the **Send Created Document as e-Mail Attachment** box to automatically email printed documents.
* Use the **Method** dropdown menu to determine how documents are emailed:
  * Select **Launch Default Email Client** to launch the default email client of the local computer when documents are printed, and then send emails manually.

The values entered in the **e-Mail Properties** text boxes are used as default values for emails.

- Select **Send Through Default Email** to email printed documents on the default email client of the local computer. Documents are auto-emailed when this option is used and the option to edit email properties is not available.
- **Send Directly Through SMTP Server** uses the server specified in the **Server** text box of the **SMTP Properties** section to email printed documents. Use the **New, Edit** and **Remove** buttons to create/edit/delete servers.
- Use the **e-Mail Properties** text boxes to determine the parameters used to send emails:
- Select the **Send Document in ZIP Archive** box to send files in **(*.zip)** format.

Click **OK** to save changes.

3.2.20 **Optimization**

Optimization

The **Optimization** settings are used to optimize printed documents:
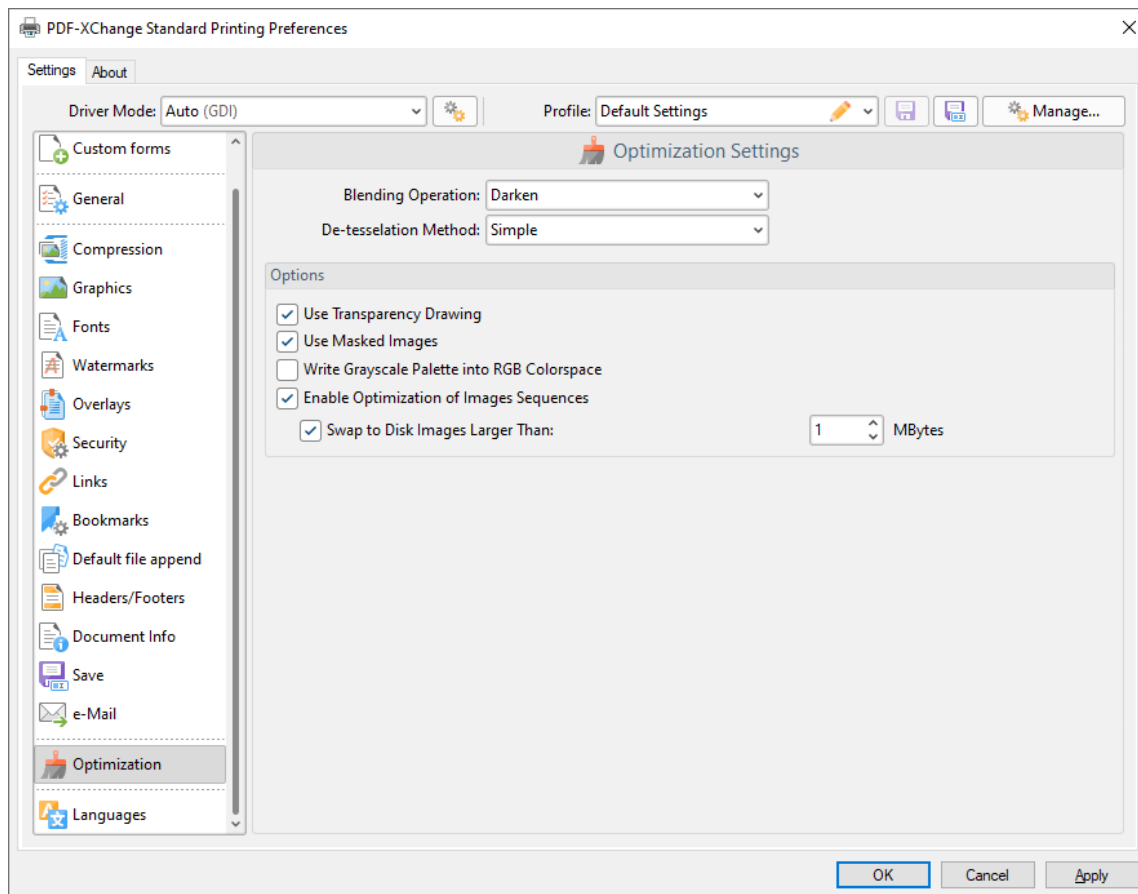
Figure 1. Optimization Settings Dialog Box

- Use the **Blending Operation** dropdown menu to determine the blend mode used in documents:
  - **Normal** maintains the selected **Fill Color**.
  - **Multiply** multiples the **Fill Color** value with the color value of the underlying content. Resultant colors are at least as dark as one of the source colors.

- **Screen** multiplies the *complements* of the **Fill Color** value with the color value of underlying content and then complements the result. The resulting color will be at least as light as one of the source colors.
- **Overlay** either multiplies or screens the **Fill Color** value with the color value of underlying content, depending on the color value of the latter. The **Fill Color** will overlay the underlying content while preserving its highlights and shadows. The color of underlying content will be blended with the **Fill Color** to reflect its shade.
- **Darken** selects the darker of the **Fill Color** value and the color value of underlying content.
- **Lighten** selects the lighter of the **Fill Color** value and the color value of underlying content.
- **Color Dodge** brightens the color of the underlying content to reflect the **Fill Color**. Note that if black is used as the **Fill Color** then there will be no effect.
- **Color Burn** darkens the color of the underlying content to reflect the **Fill Color**. Note that if white is used as the **Fill Color** then there will be no effect.
- **Hardlight** either multiples or screens the **Fill Color** value with the color value of underlying content, depending on the **Fill Color** value. This creates the effect of shining a strong spotlight on the underlying color.
- **Softlight** either darkens or lightens colors, depending on the **Fill Color** value. This creates the effect of shining a diffused spotlight on the underlying color.
- **Difference** subtracts the darker of the constituent colors from the lighter color.
- **Exclusion** performs a less contrasted version of the **Difference** option.
- Use the **De-tesselation Method** dropdown menu to enable/disable the de-tesselation of complex objects, which reduces the size of files and optimizes viewing speeds.
- Select the **Use Transparency Drawing** box to restore transparency after documents are printed. Note that this box should be cleared when older versions of **Adobe Acrobat Reader** are used, as they are not always compatible with transparency drawing.
- Select the **Use Masked Images** box in order to simplify the imaging process. Note that this process may result in bugs in some cases.
- Select the **Write Grayscale Palette into RGB Colorspace** box to include the grayscale palette in the RGB colorspace. This may solve bugs experienced in relation to the grayscale palette/colorspace.
- Select the **Enable Optimization of Images Sequences** box to permit **PDF-XChange Standard** to optimize image sequences.
- Select the **Swap to Disk Images Larger Than** box to determine the size at which images are swapped to disk. Enter the desired value in the number box.

If any issues are experienced in relation to transparency/flattening when using **AutoCAD** and similar programs to print documents then please ensure that the **Blending Operation** setting is set to **Normal.**
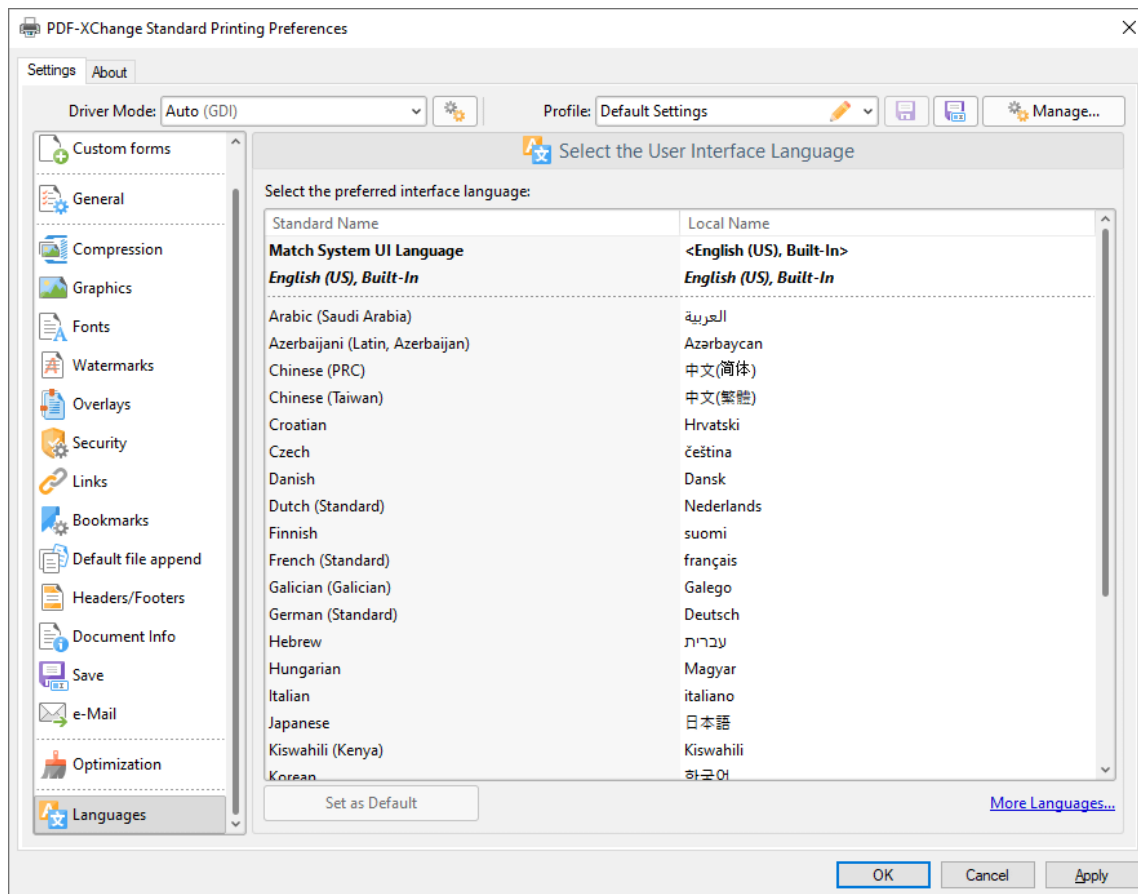
Click **OK** to save changes.

3.2.21 **Languages**

Languages

The **Languages** settings are used to determine the language of the user interface:

Figure 1. Choose Interface Language Dialog Box

- Select the **Use Users Regional Settings** box to use the regional language of the local computer. Clear this box to select a language from the **Available Languages** window.
- Select a language and click **Set as Default** to enable it.

Click **OK** to save changes.

3.3   Convert Web Pages to PDF

Convert Web Pages to PDF

You can use **PDF-XChange Standard** to convert web pages in Chromium-based browsers to PDF. Simply browse to the web page, right-click it and select **Convert to PDF:**

Figure 1. Right-Click Shortcut Menu from Chromium-Based Browser, Convert to PDF Highlighted

The **Save As** dialog box will open. Enter the desired name for the document, then click **Save** to complete the conversion to PDF.

3.4   PDF Saver

PDF Saver

The **PDF Saver** feature is used to view/edit additional settings, and to run **PDF-XChange Standard** from the command line. Enter "pdfsaver" in the **Windows Search** box, then click **PDF-XChange Standard pdfsaver** to open the **PDF Saver:**
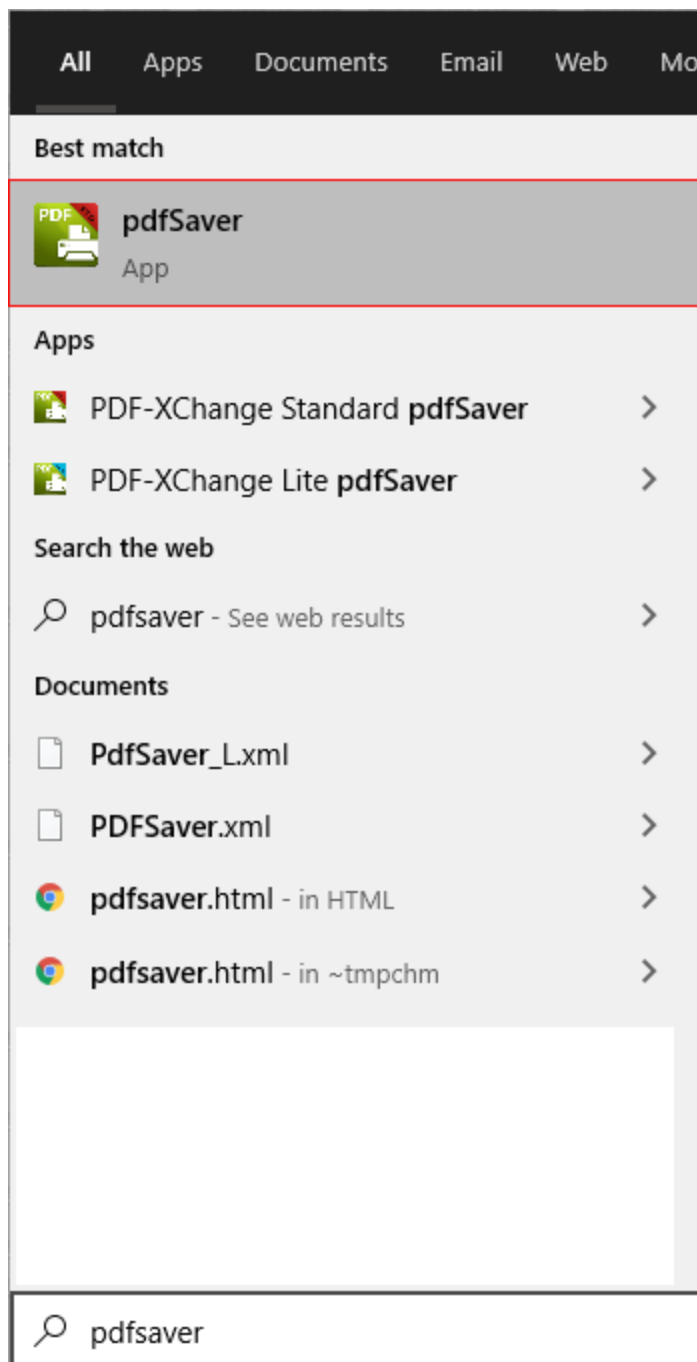
Figure 1. Windows Search Box

The **PDF Saver** feature will open:
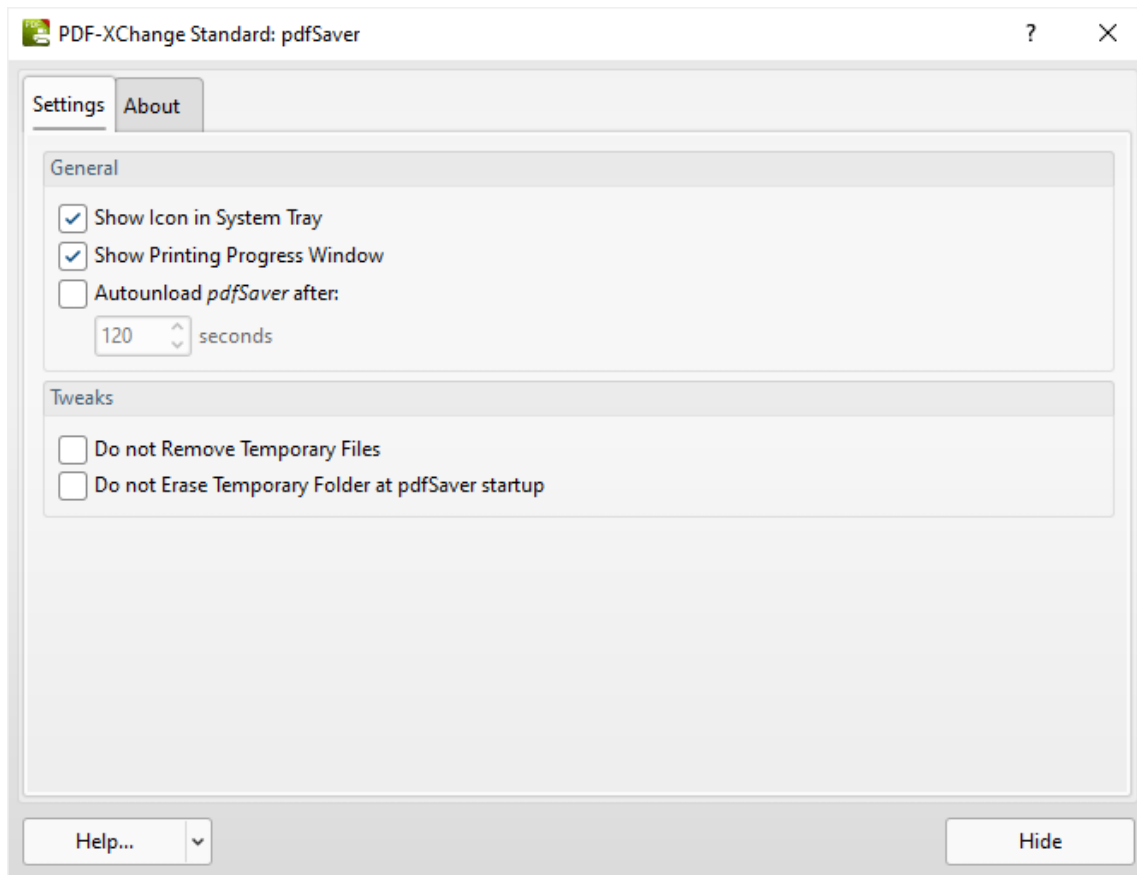
Figure 2. PDF-XChange Standard: pdfSaver Dialog Box, Settings Tab

- Select/clear the **Show Icon in System Tray** box to show/hide the **PDF Saver** icon in the system tray.
- Select/clear the **Show Printing Progress Window** to show/hide the printing progress window when print jobs are performed.
- Select/clear the **Autounload *pdfSaver* after** box to enable/disable the autounloading of **PDF Saver.** If this option is enabled then enter the desired time in the number box.
- Select/clear the **Do not Remove Temporary Files** to retain/discard temporary files.
- Select/clear the **Do not Erase Temporary Folder at pdfSaver startup** box to retain/discard the temporary folder on **PDF Saver** startup.

About

The **About** tab provides further information about **PDF Saver:**
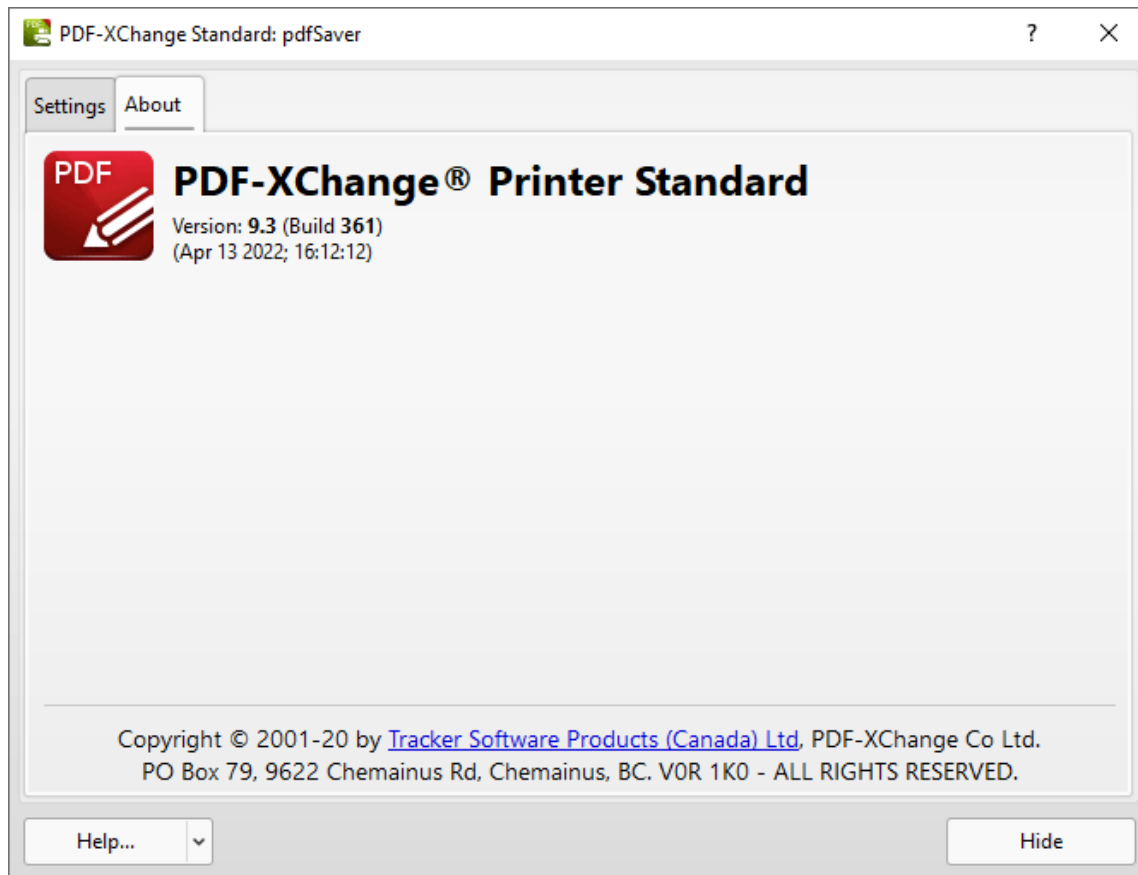
Figure 3. PDF-XChange Standard: pdfSaver Dialog Box, About Tab

---

Command Line Options

Please note the following with regard to using command line options for **PDF Saver:**

- Unless the path to **pdfsaver.exe** is added to the system %path%, then the full path to **pdfsaver.exe** must be explicitly specified.
- If a profile is specified then changes will be made to that profile. If a profile is not specified then the changes will be made to the current printer's settings.
- If any value has spaces, backslashes or forwardslashes then the option that contains it should be enclosed in double quotation marks. Similarly, if there are spaces within the optionslistfile, it should also be enclosed in double quotation marks.

Available command line options are detailed below:

pdfSaver.exe /AddPrinter <PrinterName> [/NoNotify]

This command line can be used to install multiple copies of **PDF-XChange Standard** and give each copy a custom name:

- **<AddPrinter>** adds a new printer to the printers list.
- **<PrinterName>** determines the printer name.
- **<NoNotify>** is an optional parameter that prevents the sending of information about changes in the printers list to other applications.

Note that there are several benefits to installing multiple copies of **PDF-XChange Standard,** such as the ability to send print jobs to different printing profiles without the need to manually select a profile for each job.

---

pdfSaver.exe /RemovePrinter <PrinterName> [/NoNotify]

This command line removes instances of the **PDF-XChange** printer.

---

pdfSaver.exe /SetAsDefault <PrinterName>

This command line sets a specified printer as the default printer.

---

pdfSaver.exe /SetOptions optionname1=value1[;optionname2=value2] /Printer <PrinterName> [/Profile <ProfileName>] [/NoNotify]

or

pdfSaver.exe /SetOptions @optionslistfile /Printer <PrinterName> [/Profile <ProfileName>] [/NoNotify]

These command lines can be used to change the printer options.

---

pdfSaver.exe /DumpOptions [<dest_file_name>] /Printer <PrinterName> [/Profile <ProfileName>]

This command line lists all settings of the printer specified. If **<dest_file_name>** is not specified then settings will be listed in the console window.

Command Line Examples

- Set the letter paper size:

  ```
  pdfSaver.exe /SetOptions "DevMode.PaperSize=1" /Printer "PDF-XChange
  Standard"
  ```

- Specify the generation of "PDF/A-2b" PDFs and to not run the PDF viewer after file generation:

  ```
  pdfSaver.exe /SetOptions "General.Specification=PDFA-
  2b;Save.RunApp=false" /Printer "PDF-XChange Standard"
  ```

- Specify the use of an options file:

  ```
  pdfSaver.exe /SetOptions @c:\documents\opt.lst /Printer "PDF-XChange
  Standard"
  ```

An options file is a text file (supported text files in Unicode with BOM, UTF-8 with BOM and UTF-8 w/o BOM formats) where each line has one option and value, such as:

```
General.Specification=PDFA-2b
Save.RunApp=false
```

Use the command line below to dump all printer options to the console:

```
pdfSaver.exe /DumpOptions /Printer "PDF-XChange Standard"
```

Alternatively, it is possible to specify a file in which to dump the printer options:

```
pdfSaver.exe /DumpOptions "C:\printer_settings.txt" /Printer "PDF-XChange
Standard"
```

3.5 MSOffice Toolbar Add-in

MSOffice Toolbar Add-in

The **MSOffice Toolbar Add-in** installs with **PDF-XChange Standard** and displays in **MS Word, Excel** and **PowerPoint** toolbars. This means that different print settings can be determined for these applications as desired and avoids the need to continually change settings when documents are printed from different applications. You can use the **Convert to PDF** option to print documents to PDF from **MS Office** applications. Click the **PDF-XChange** tab to view options:
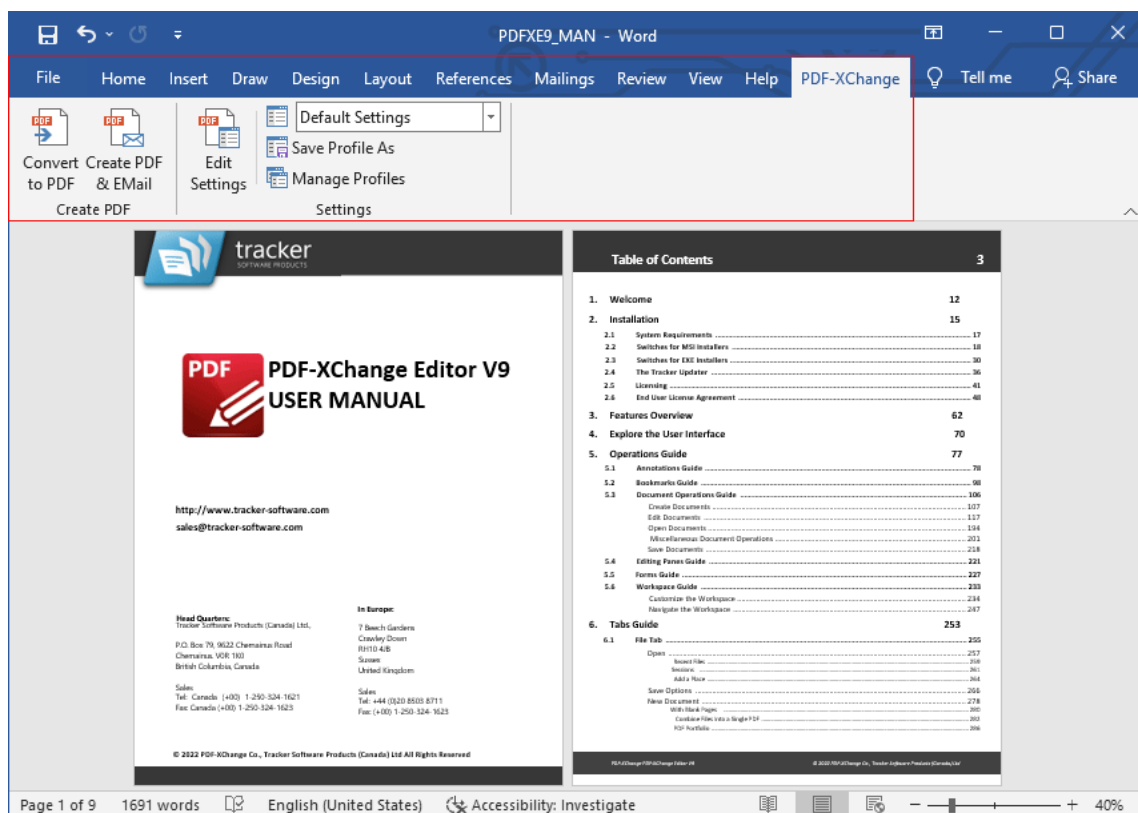
Figure 1. MSOffice Toolbar Add-in Options, MS Word

- Click **Convert to PDF** to convert the active document to PDF.
- Click **Create PDF & Email** to convert the active document to PDF and email it via the **e-Mail** 160 settings.

- Click **Edit Settings** to view/edit the **PDF-XChange Standard** settings, as detailed below.
- Use the dropdown menu to determine the printing profile used to print documents, as detailed **here.** [62]
- Click **Save Profile As** to save the current settings to a new profile, as detailed **here.** [62]
- Click **Manage Profiles** to manage existing profiles, as detailed **here.** [64]

Settings

Click **Edit Settings** to edit the print settings for the current **MS Office** application. The **PDF-XChange Settings** dialog box will open. Available settings can be divided into two sections - those that all **MS Office** applications share, and application-specific settings. Note that changes made to settings will determine the output for only documents from the application through which the **MSOffice Toolbar Add-in** was accessed. Additionally, the commands in the **MSOffice Toolbar Add-in,** as detailed in and below *(figure 1),* must be used in order for these settings to be utilized. If the option to print is selected from the **File** menu instead then the **Windows** settings for **PDF-XChange** will be used.

Shared Settings

The shared settings are the same in the **MS Office Toolbar** for all **MS Office** applications:
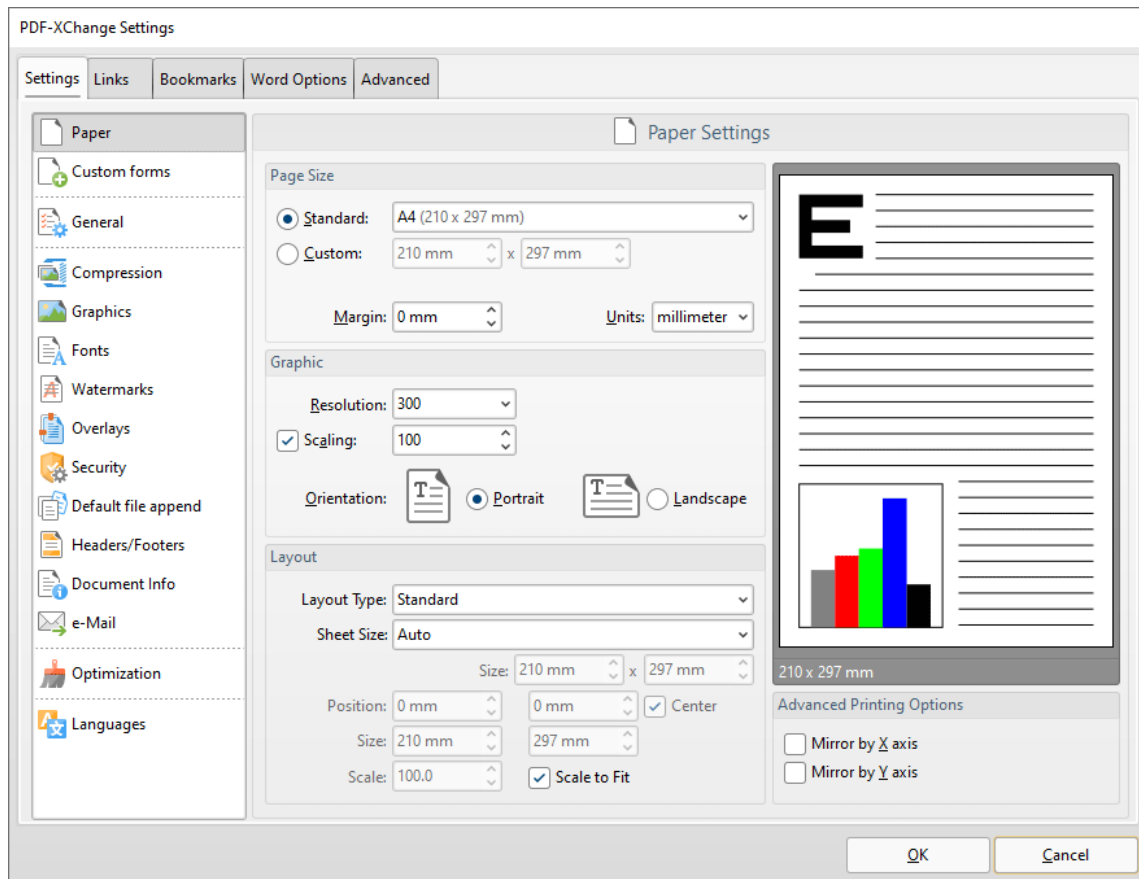
Figure 2. PDF-XChange Settings Dialog Box, Settings Tab

These settings are used to determine printing parameters, as detailed in the earlier sections of this manual.
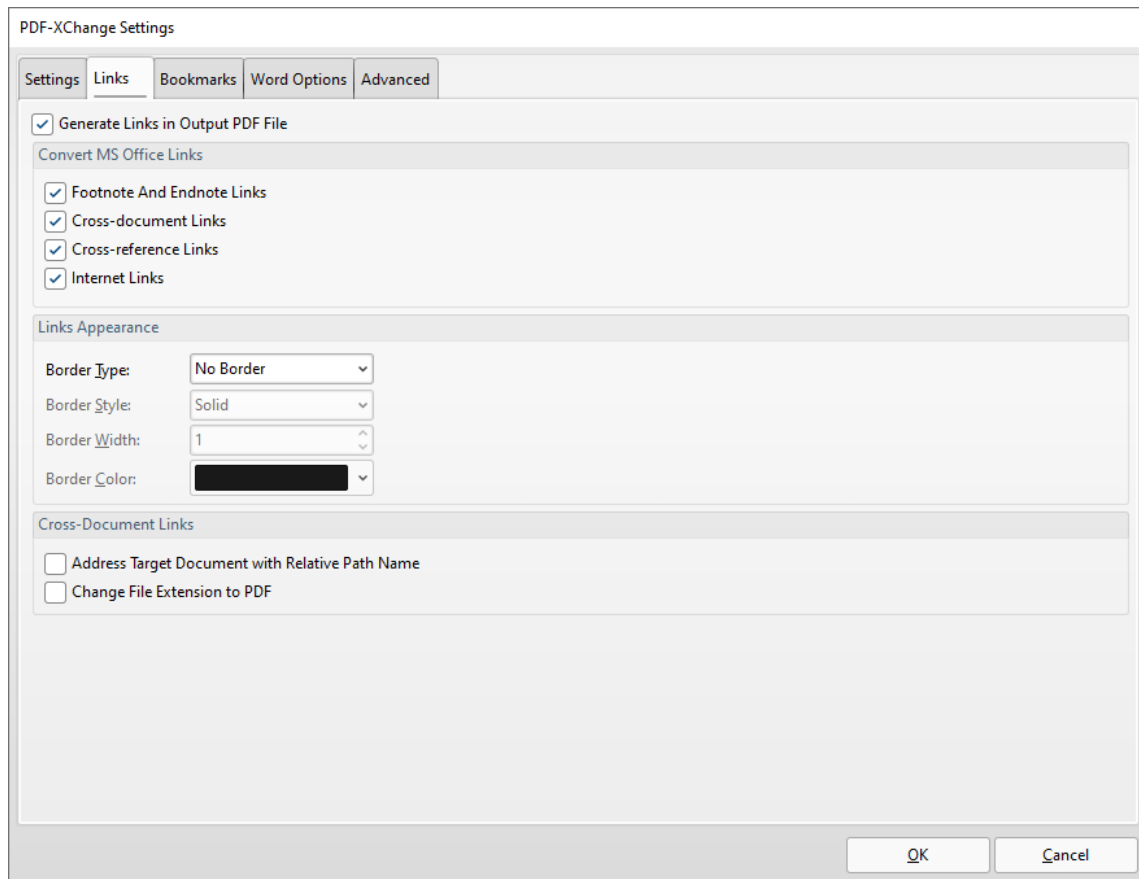
Links Settings

Figure 3. PDF-XChange Settings Dialog Box, Links Tab

The **Links** settings are used to determine options for links in printed documents:

- Select/clear the **Generate Links in Result PDF File** box to enable/disable links in printed documents.
- Use the **Convert MS Office Links** check boxes to enable/disable link conversion for the associated link formats.
- Use the **Links Appearance** dropdown menus to determine style options for links.
- Select the **Address Target Document with Relative Path Name** box to convert fully-qualified path name links into path names that are relative to the active document. This is a useful feature if documents are maintained in a folder hierarchy.
- Select the **Change File Extension to PDF** box to change the existing file extension to **(*.pdf).** This is a useful feature if the current document points to other documents that will also be converted to PDF format.

Advanced Settings
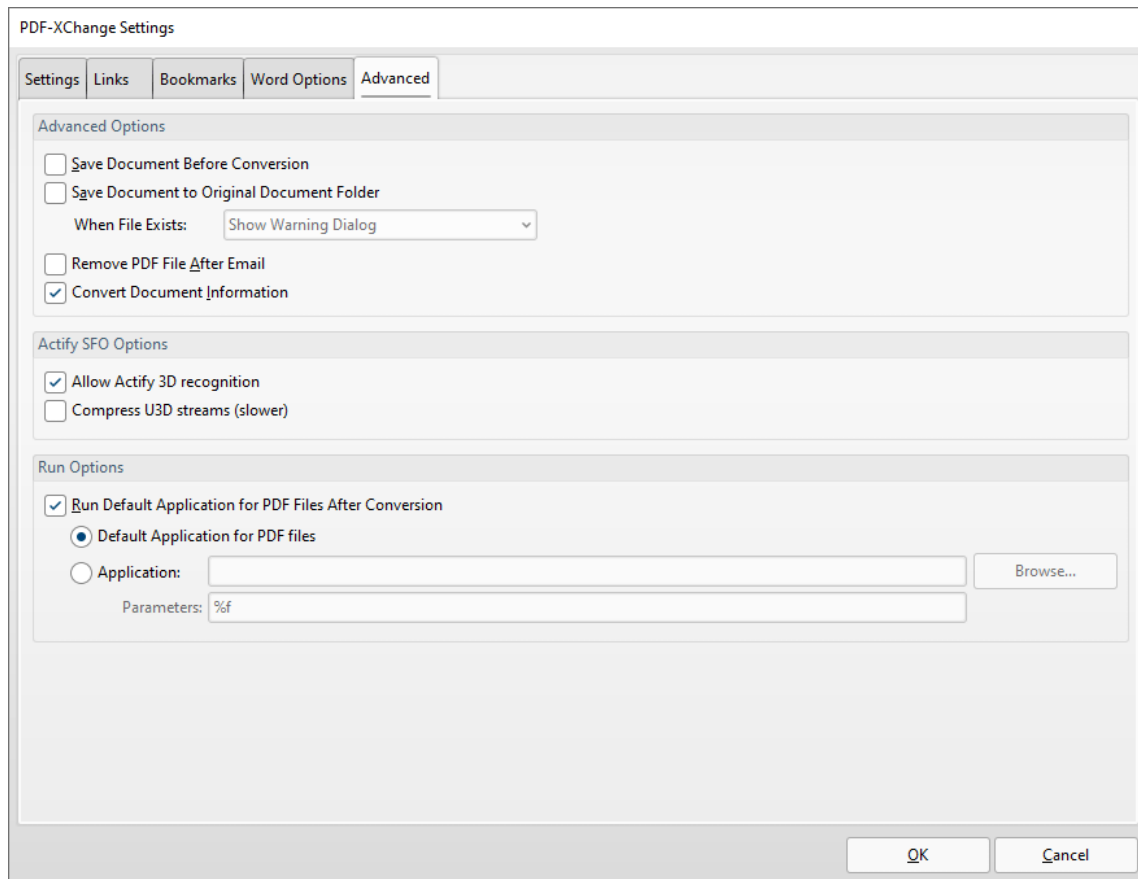
Figure 4. PDF-XChange Settings Dialog Box, Advanced Tab

The **Advanced** settings are used to determine advanced options for printed documents:

- Select the **Save Document Before Conversion** box to save documents before conversion to PDF.
- Select the **Save Document to Original Document Folder** box to save converted documents in their source folder.
    - Use the **When File Exists** dropdown menu to determine the action taken when the document folder already contains a document with the same name as the new document.
- Select the **Remove PDF File After Email** box to remove PDF files that have been printed and emailed.
- Select the **Convert Document Information** box to include document properties from source files in printed files.
- Select the **Allow Actify 3D Recognition** box to allow **PDF-XChange Standard** to recognize and encode **Actify**-based 3D graphics.
- Select the **Compress U3D streams** box to compress **Universal 3D** files, which reduces the size of files but may take longer to process.
- Select the **Run Default Application for PDF Files After Conversion** box to launch the default PDF viewer after file conversion:

- Select the **Default Application for PDF files** box to open converted documents in the default PDF application.
- Select the **Application** button to specify an alternative application with which to open converted emails. Enter the name of the application in the text box or click **Browse** to select an application manually.

Application-Specific Settings

MS Word, Excel and PowerPoint each feature an application-specific tab in the **MS Office Toolbar Add-in.** These settings determine output options for their respective applications:

MS Excel Options
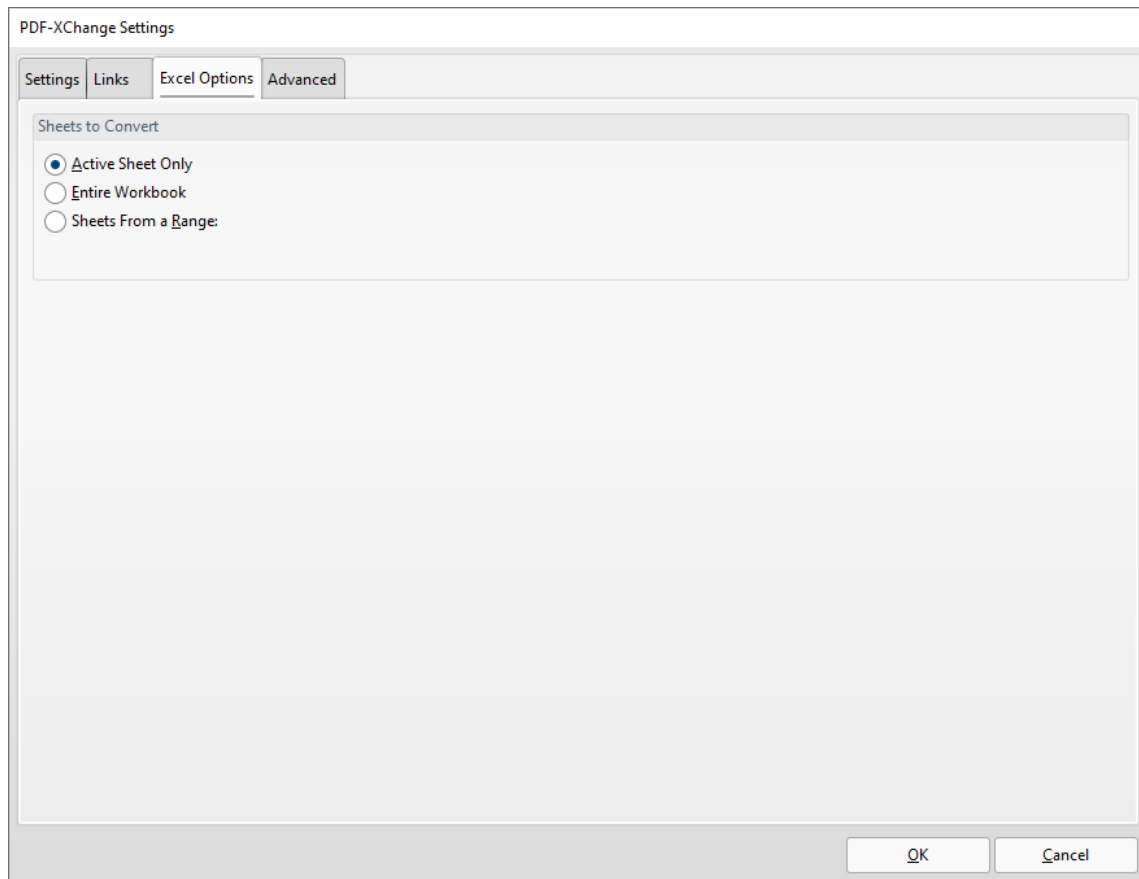
Figure 5. MS Excel Options

- Select the **Active Sheet Only** box to convert only the active sheet to PDF.
- Select the **Entire Workbook** box to convert the entire workbook to PDF.
- Select the **Sheets From a Range** box to convert sheets from a custom range. Two number boxes will open when this option is selected. Enter the first and last page of the desired range.

MS PowerPoint Options
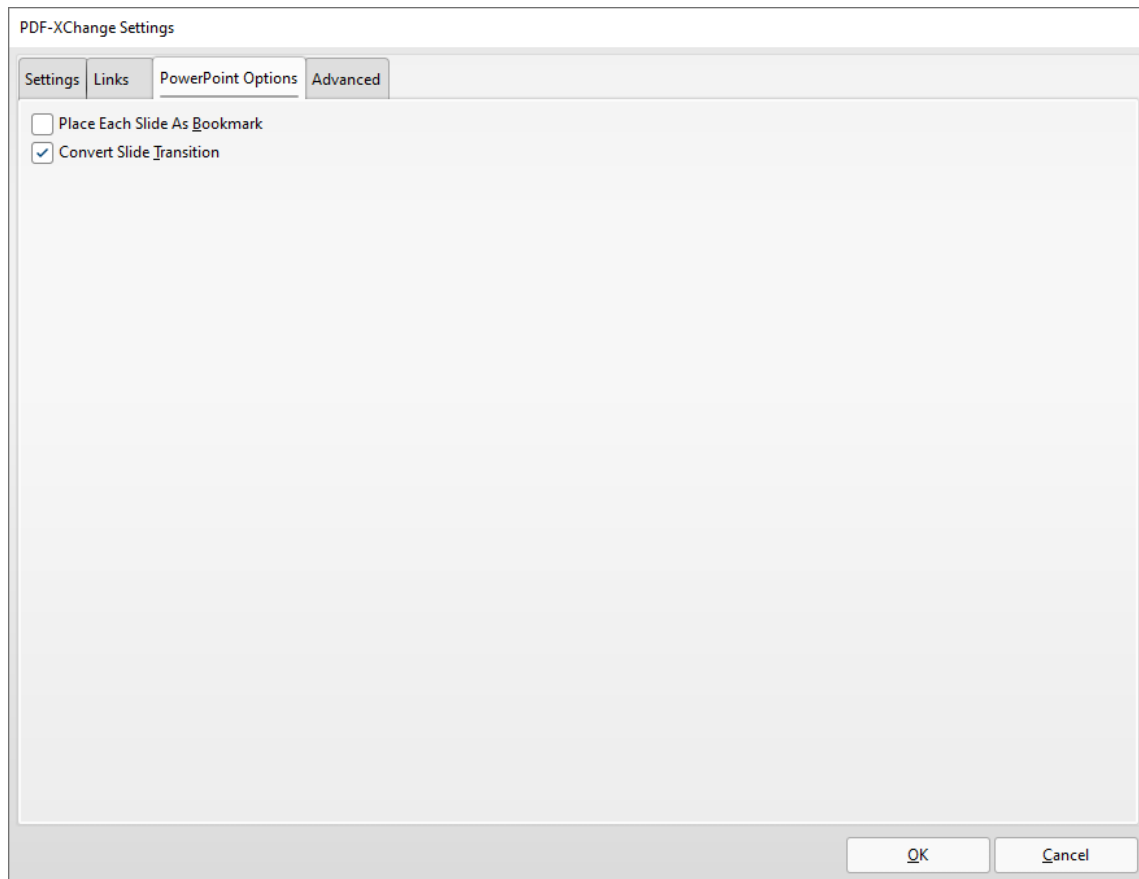
Figure 6. MS PowerPoint Options

- Select the **Place Each Slide As Bookmark** box to create a bookmark from each slide in the project.
- Select the **Convert Slide Transition** box to convert the transition slides in printed files.
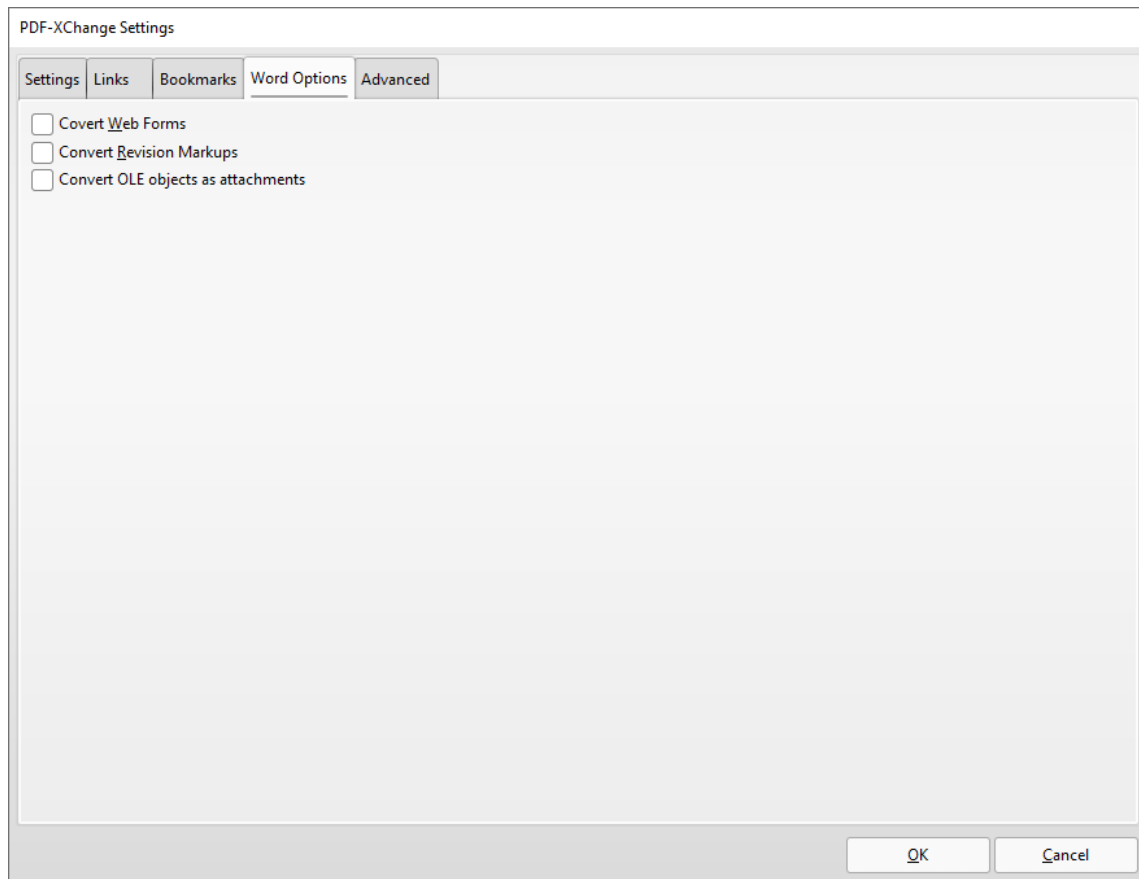
MS Word Options

PDF-XChange Settings

Settings | Links | Bookmarks | Word Options | Advanced

☐ Covert Web Forms
☐ Convert Revision Markups
☐ Convert OLE objects as attachments

OK   Cancel

Figure 7. MS Word Options

- Select the **Convert Web Forms** box to include web forms in the conversion to PDF.
- Select the **Convert Revision Markups** box to include revision markups in the conversion to PDF.

Note that the **Bookmarks** tab is also available in the **MSOffice Toolbar Add-in** for **MS Word:**
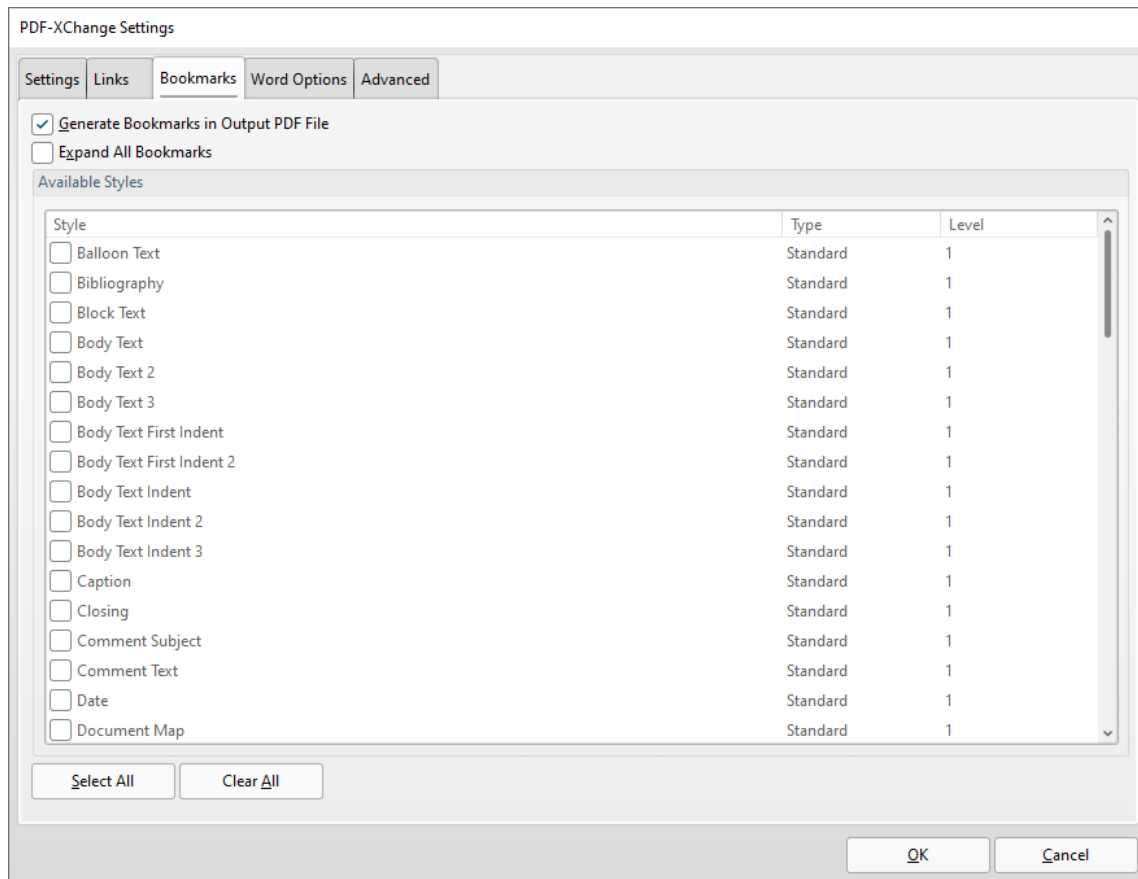
Figure 8. MS Word Toolbar Add-in, Bookmarks Tab

- Select the **Generate Bookmarks in Result PDF File** to generate bookmarks in printed files.
- Select the **Expand All Bookmarks** box to expand all created bookmarks in printed files.
- Select styles in the **Available Styles** pane to determine the style of bookmarks.

Click **OK** to save changes.

3.6   MS Outlook Add-in

MS Outlook Add-in

The **PDF-XChange MS Outlook Add-in** installs with **PDF-XChange Standard** and displays in **MS Outlook.** It enables the immediate conversion to PDF of emails and bypasses the need for an email client when it is used to archive emails. The **PDF-XChange** tab is available in the main window of **MS Outlook:**
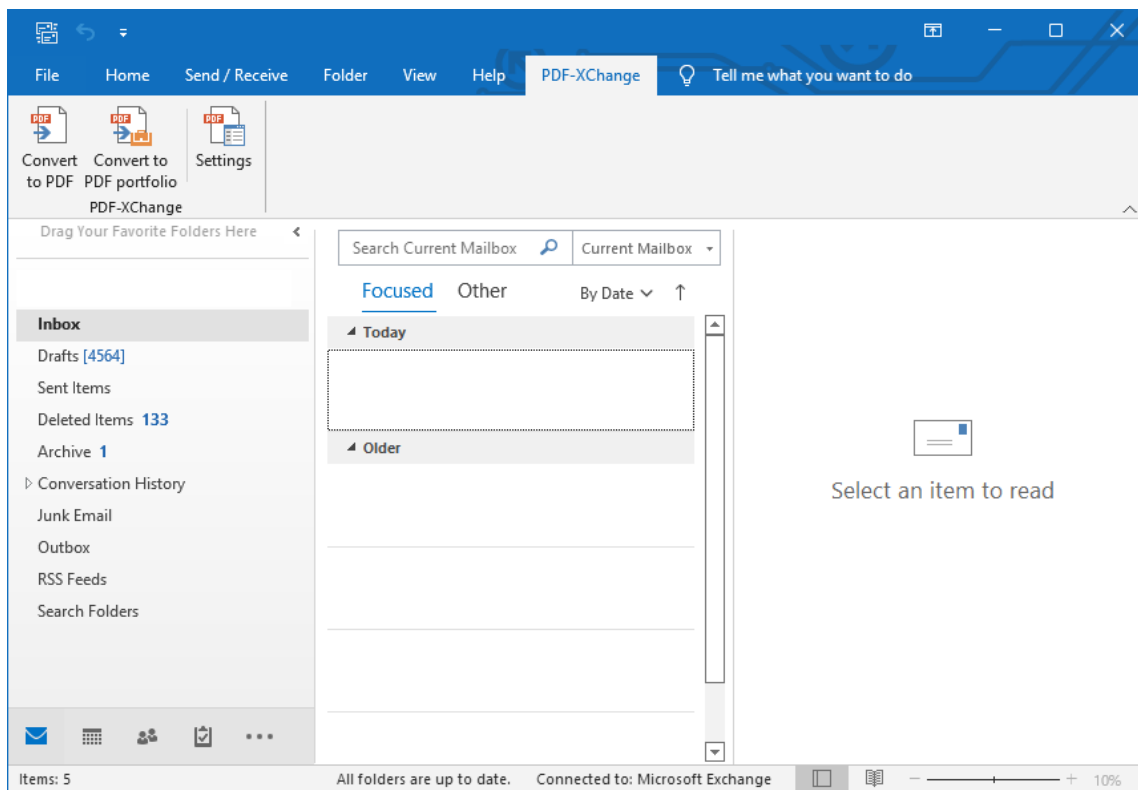
Figure 1. MS Outlook Main Window, PDF-XChange Tab

- Click **Convert to PDF** to convert the current email to PDF.
- Click **Convert to PDF Portfolio** to convert the current email to a PDF portfolio file.
- Click **Settings** to determine settings for the **MS Outlook Add-in.** The **PDFXChange Options** dialog box will open:
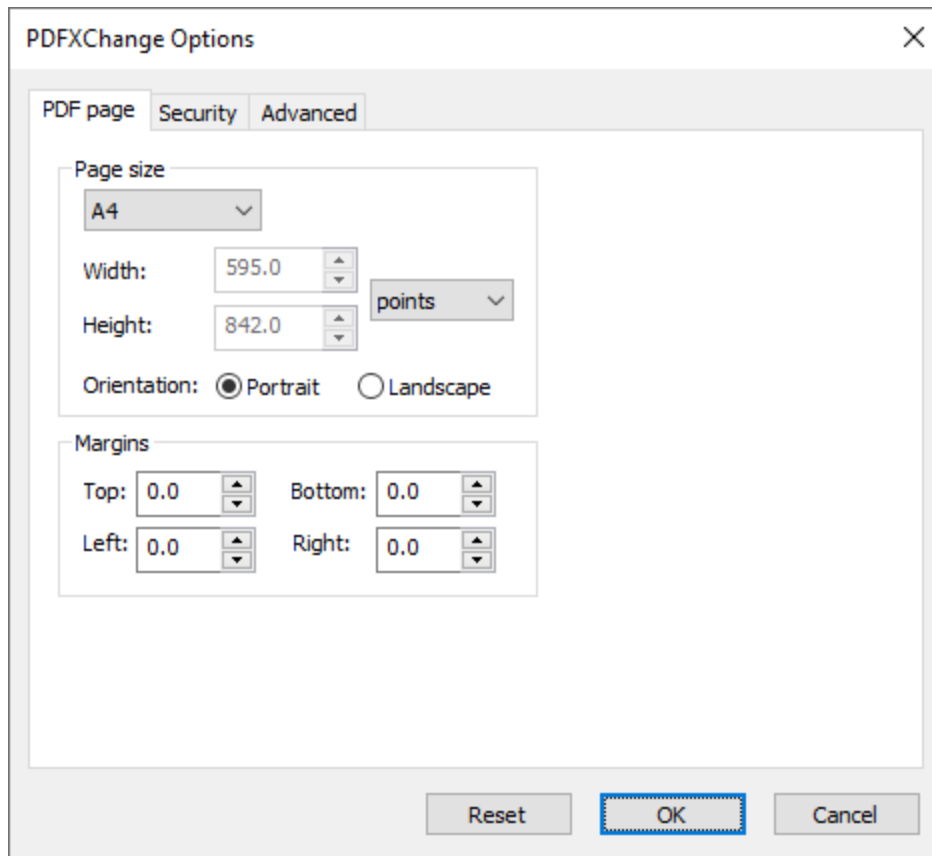
Figure 2. PDFXChange Options Dialog Box, PDF Page Tab

- Use the **Page Size** dropdown menu to determine the page size of converted emails. Alternatively, use the number boxes and units of measurement dropdown menu to determine custom sizes.
- Select either **Portrait** or **Landscape** as the orientation of converted emails.
- Use the **Margins** number boxes to determine the size of page margins in converted emails.
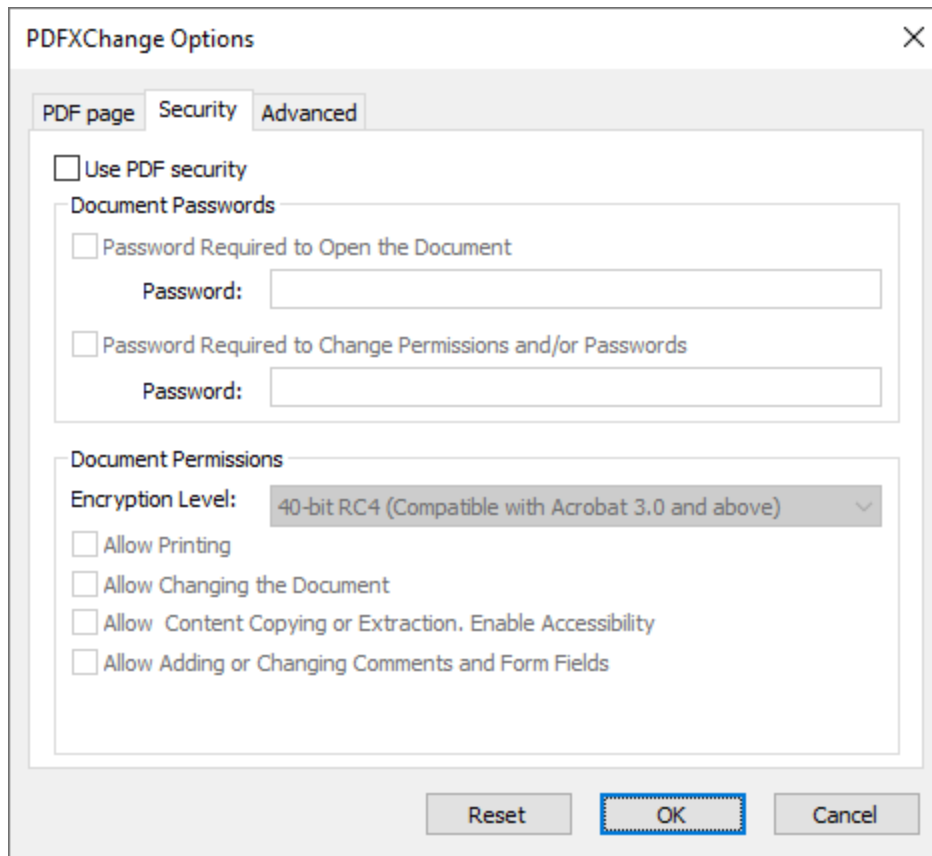
Click **Security** to determine security settings:

Figure 3. PDF-XChange Options Dialog Box, Security Tab

- Select the **Use PDF Security** box to enable PDF security.
- Select the **Password Required to Open the Document** box to set a password for the document, then enter the desired password in the **Password** text box.
- Select the **Password Required to Change Permissions and/or Passwords** box to set a password for changing document permissions and/or passwords, then enter the desired password in the **Password** text box.
- Use the **Document Permissions** options the encryption level and permissions settings of the document:
- Select the desired level of encryption level in the **Encryption Level** dropdown menu, then select the check boxes as desired to determine additional settings.

Click **Advanced** to determine advanced settings for the conversion of emails:
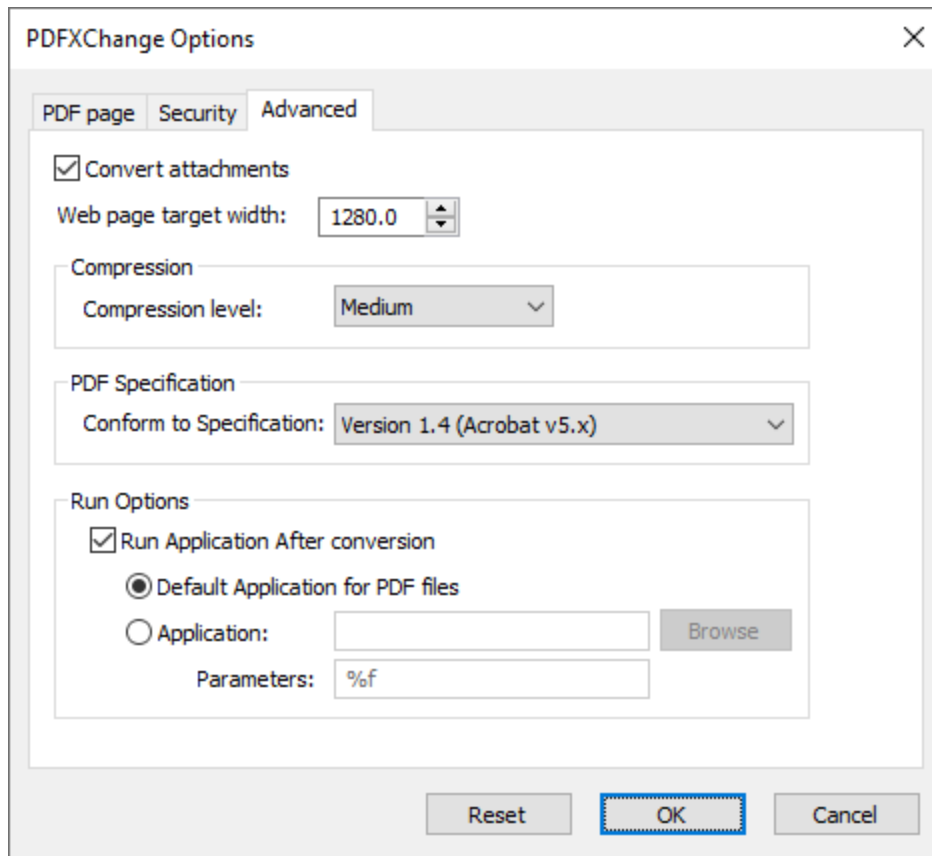
Figure 4. PDFXChange Options Dialog Box, Advanced Tab

- Select the **Convert Attachments** box to include email attachments in the conversion.
- Use the **Web page target width** number box to specify the width of the converted web page. Increase/decrease the value to increase/decrease the scale of converted emails.
- Use the **Compression level** dropdown menu to determine the level of compression for converted emails.
- Use the **Conform to Specification** dropdown menu to determine the **PDF Specification** for converted emails.
- Select the **Run default application for PDF files after conversion** button to launch the default PDF viewer after emails have been converted and view the new documents.
- Select the **Application** button to specify an alternative application with which to open and view converted emails. Enter the path to the application (for example, **PDF-XChange Editor** uses the path **PDFXEdit.exe** by default) in the text box or click **Browse** to select an application manually.
- Use the **Parameters** text box to enter additional run parameters for the application specified in the **Application** text box.

Click **OK** to save changes.

3.7 OFFice2PDF

Office2PDF

The **OFFice2PDF** feature enables the convenient batch-conversion to PDF of **MS Word, Excel** and **HTML** documents. Please note that **MS Word/Excel** must be installed on the local computer in order to convert **MS Word/Excel** documents.

Enter "office2PDF" in the **Windows Search Box,** then click **PDF-XChange Office2PDF** to launch this feature:
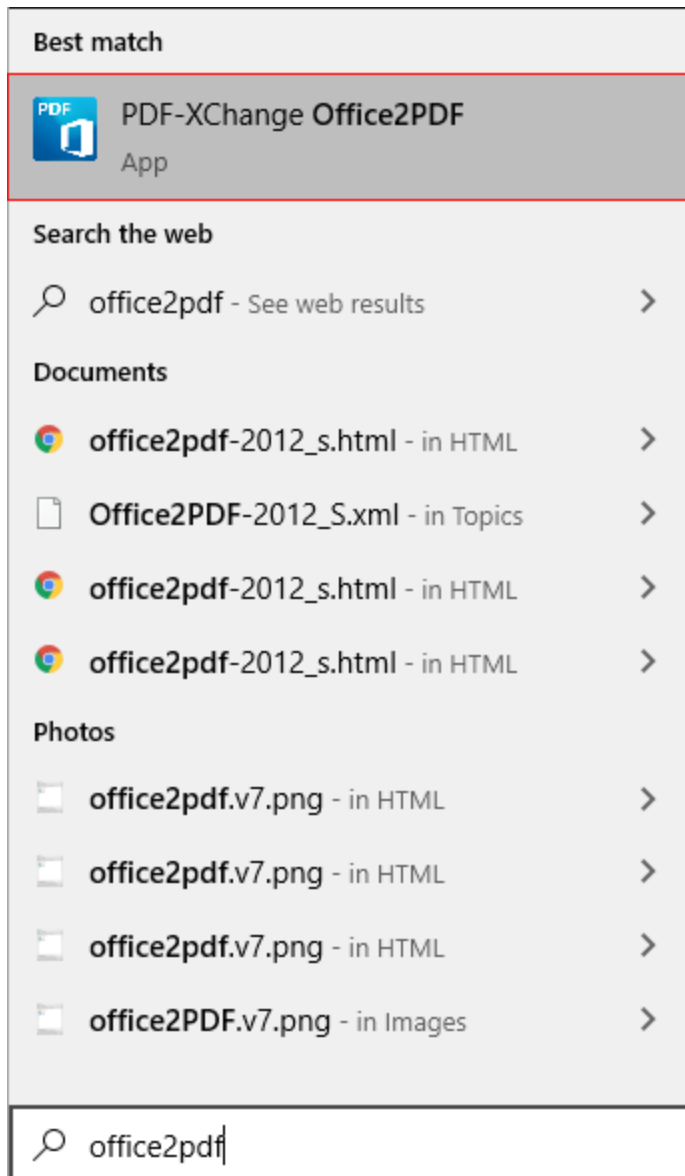
Figure 1. Windows Search Box Results
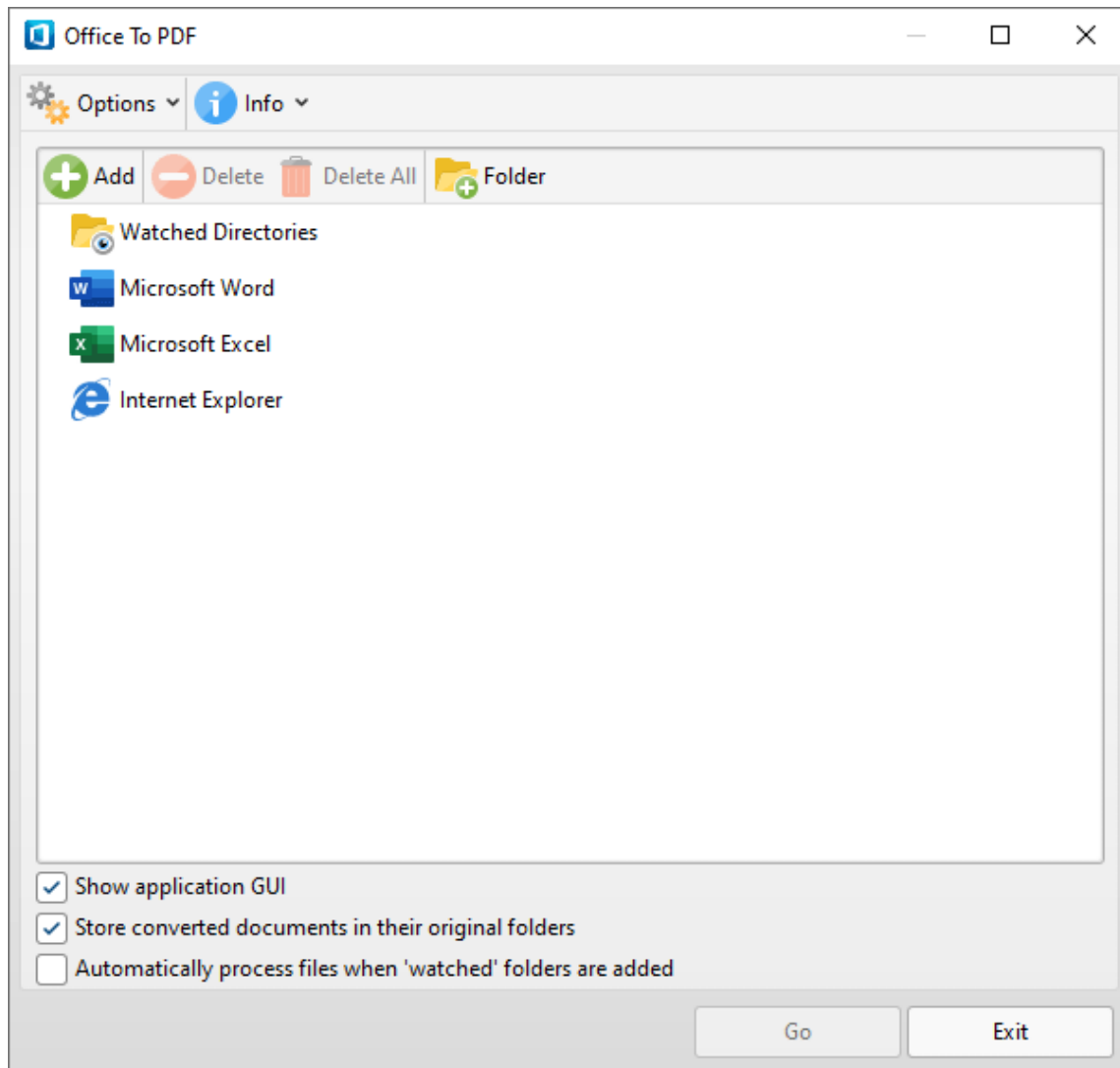
The **Office To PDF** dialog box will open:

Figure 2. Office2PDF Dialog Box

- The **Watched directories** list contains three entries by default: **Microsoft Word, Microsoft Excel** and **Internet Explorer.** The **Office2PDF** feature is compatible with the output from these applications. I.e. **MS Word/Excel** documents and **(*.html)** files. Source files are displayed as children of the associated parent application when they are added to the **Office2PDF** dialog box.
- Click **Add, Delete** or **Delete All** to add/delete/delete all added files.
- Click **Folder** to add folders to the **Office2PDF** feature. Files that are compatible with the **Office2PDF** feature are converted to PDF automatically when they are added to folders detailed in the list.
- Select/clear the **Show Application's GUI** box to enable/disable the display of the UI of applications when files are converted.
- Select the **Store converted documents in their original folders** box to save converted files in the same location as original files.

- Select the **Automatically process files from just added 'watched' folder** box to process files automatically when they are added to folders in the **Watched directories** list.
- Note that it is also possible to drag files/folders into the **Office2PDF** dialog box.

There are two options in the **Options** dropdown menu:

- Click **Settings** to determine the print parameters of **PDF-XChange Standard,** as detailed [here.](113)
- Click **Exit** to exit **OFFice2PDF.**

There are two options in the **Info** dropdown menu:

- Click **Help** to launch the help section of the **PDF-XChange** website.
- Click **About** to view further information about **Office2PDF.**

Click **Go** to convert files to PDF.

3.8   Features Added in Version 9

Features Added in Version 9

The following features were added in **Version 9** of **PDF-XChange Standard:**

- Added support for **Outlook Meetings** conversion in the **Outlook** plugin.
- Added an **MS Edge** extension that converts open pages to PDF documents.
- New save dialogs for the **Outlook** and **IE** plugins.
- Added internal link and bookmark recognition in **XPS** printing mode.
- Updated and refreshed user interface.
- New JPEG encoder added to the software to reduce the file size and improve the image quality when JPEG compression is used.