

FOR LEGAL PROFESSIONALS

Versions 10, 11, & 12



FOR LEGAL PROFESSIONALS

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The materials in this book were written using Foxit PDF Editor 12 and all steps and instructions were tested prior to the publication date. Your software experience may vary slightly from what is seen in this manual if you have a previous version.

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Version 5.01



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MEET OUR TEAM OF PDF EDITOR EXPERTS

Meet our team of PDF Editor experts who have co-authored this manual.



BARRON HENLEY

Most people wouldn't relish the idea of spending a day in a conference room, teaching legal professionals how to manipulate PDFs. Barron is not most people. There are few things Barron enjoys more than teaching allday software training classes.

As an attorney, he understands how challenging it is to practice law without the proper training on the technology tools. When Barron isn't training he focuses on automating documents and teaching CLE classes for attorneys across North America.

PAUL UNGER

Paul's passion is coaching lawyers on managing time, distractions, tasks, emails, and documents efficiently. As the author of Tame the Digital Chaos – A Lawyer's Guide to Time, Task, Email and Distraction Management, Paul is truly an expert on the topic.

Paul's expertise is well-founded from his time practicing law. When Paul isn't coaching lawyers, he teaches CLE classes for attorneys across North America.





DANIELLE DAVISROE

Passionate about remote learning, Danielle is the force behind Affinity's membership training program, Affinity Insight. Danielle focuses on creating easily accessible training materials and webinars tailored to meet each organization's needs. From one-on-one training to organization-wide training plans, Danielle has her clients covered.

When Danielle isn't providing remote training, she focuses on teaching CLE via webinar and providing legal organizations with the advice they need to run smoothly. With a background practicing law at a boutique firm, Danielle understands the challenges that legal professionals face every day.



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CHAPTER 1 INTRODUCTION

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com

PDF File Types PDF/A

PDF/A (archival PDF) is a type of PDF that is used for the long-term storage of documents. Standard PDF files rely on external information, such as font libraries, to be read, and this can pose problems for retrieval far in the future. PDF/A files, on the other hand, have all information embedded in the file and do not rely on external information. This is useful for archiving, as anyone with a PDF/A reader can view a PDF/A file without the need for appropriate external information. The drawback to this is that because all information must be embedded in PDF/A files, they tend to be larger than regular PDF files.¹ For a more detailed description of PDF/A, see the description provided by the Sustainability of Digital Formats Planning for Library of Congress Collections here: http://tinyurl.com/4wfwazy. PDF/A matters to law firms because many of the electronic case filing systems require PDF/A or may require it in the future.

Image Only PDFs

This type of PDF is visually an exact replica of the original document (whether the original document was electronic or paper-based), but it contains no text which could be searched by any program. This also means that you cannot copy and paste text from the document. This is usually the type of PDF that you get when you scan a document using a copier, scanner, or multifunction machine.

Searchable PDFs

This type of PDF is also an exact replica of the original document, but it also contains a hidden layer of text so that you can search for any word on any page. PDFs created from other computer programs electronically are searchable by default. In other words, if I create a PDF from a Word or WordPerfect document, an Excel workbook, or an email, they are always searchable. As mentioned above, PDFs created by scanning can be, but are not always, searchable. The software you're using to scan will determine whether you can create searchable PDFs. So that you can easily find the PDF documents you're looking for, you want to use searchable PDFs.

PDF Editor Versions

This manual covers Foxit PhantomPDF versions 10 and Foxit PDF Editor versions 11 and 12. Differences are noted throughout, but the software is generally referred to PDF Editor.

¹ What Is PDF/A? CVISION Technologies, Inc. See <u>http://tinyurl.com/lxqnsag</u>



There are three versions of PDF Editor: PDF Editor Pro+, PDF Editor Pro, and PDF Editor (formerly PhantomPDF Business and PhantomPDF Standard). A comparison chart of the features is available here: <u>https://www.foxit.com/shopping/</u>.

Features limited to PDF Editor Pro+ include Foxit eSign signature service and cloud/mobile applications. Features limited to PDF Editor Pro(+) include bates numbering and redaction.



CHAPTER 2 MICROSOFT INTEGRATION

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

PDF Editor integrates with Microsoft Word, Outlook, Excel, PowerPoint, and File Explorer.

Word

PDF Editor's integration with Word includes a print driver and ribbon.

Print Driver

When printing, the Foxit PDF Editor driver becomes a printer option. Selecting **Foxit PhantomPDF** (version 10) or **Foxit PDF Editor Printer** (versions 11 and 12) as the printer will convert the Word document to a PDF document.

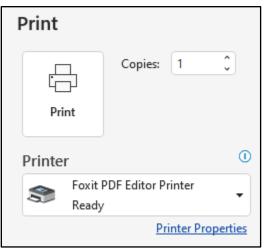


FIGURE 2-1

Ribbon

The Foxit PDF Word ribbon includes buttons to create a PDF, create a PDF and email it, mark for redaction (Pro only), and comment.

File	Home	Insert	Draw	Design	Layou	ut Referen	ces	Mailings	Review	View	Help	Foxit PDF
[_⊕				[,		
Create PDF	Create and email	Merge to Foxit PDF			ark for action ~	Create Redacted ~		PDF Editor mment ~	Advan			
Create PDF				Cr	eate Red	acted PDF	Co	omment	General S	ettings		

FIGURE 2-2



Create PDF converts the open Word document to a PDF.

Create and email converts the open Word document to a PDF and attaches it to a new email.

Merge to Foxit PDF converts mail merge templates to PDFs and attaches them to emails.

Create to ECM converts the open Word document to a PDF and saves into your Document Management System.

Mark for Redaction allows the open Word document to be marked for Redaction.

Create Redacted converts the open Word document to a redacted PDF. This feature is only available after the Word document has been marked for redaction.

Foxit PDF Editor Comment imports comments from a PDF version of the document.

Advanced changes the settings for the PDF creation.

Outlook

Foxit PDF Editor's integration with Outlook includes a print driver and ribbon.

Print Driver

When printing, the Foxit PDF driver becomes a printer option. Selecting Foxit Editor PDF as the printer will convert the email to a PDF document.

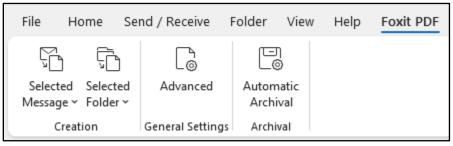
Print	
Print	Copies: 1
Printer	0
S Foxit F Ready	PDF Editor Printer
	Printer Properties

FIGURE 2-3



Ribbon

The main window Foxit PDF Outlook ribbon is available when viewing email, calendar, people, and tasks. However, not all buttons in the ribbon are applicable to all Outlook features.





Selected Message converts the selected email message to a PDF or appends it to an existing PDF.

Selected Folder converts one or more folders to a PDF or appends the contents to an existing PDF.

Advanced changes the settings for the PDF creation.

Automatic Archival sets up automatic email archiving.

Excel And PowerPoint

PDF Editor's integration with Excel and PowerPoint includes a print driver and ribbon.

When printing, the Foxit PDF driver becomes a printer option. Selecting **Foxit PhantomPDF** (version 10) or **Foxit PDF Editor Printer** (versions 11 and 12) as the printer will convert the open document to a PDF document.

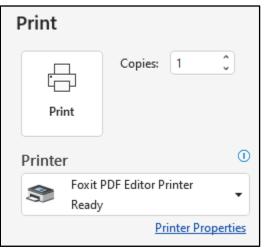


FIGURE 2-5





Ribbon

The Foxit PDF Excel and Power Point ribbons match the Word ribbon, except that they do not include the ability to import comments.

File Ho	me Insert	Page Layout	Formulas	Data Revi	ew View	Help	Foxit PDF
[⊕ [•	C _o			
	reate Createto email ECM ~	Mark for Redaction ∽	Create Redacted ~	Advanced			
Cre	ate PDF	Create Rec	lacted PDF	General Setting	s		

FIGURE 2-6

File Explorer

Conversion to PDF

The File Explorer integration allows documents to be converted to PDF files by right-clicking on then in File Explorer and selecting **Convert to PDF in Foxit PhantomPDF** (version 10) or **Convert to PDF in Foxit PDF Editor** (versions 11 and 12). If multiple files are selected at once (using CTRL or SHIFT click), they can quickly be combined into one PDF.



FIGURE 2-7



CHAPTER 3

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Main Window

The main window includes the Quick Access Toolbar, Ribbon, Navigation Pane, and Status Bar.

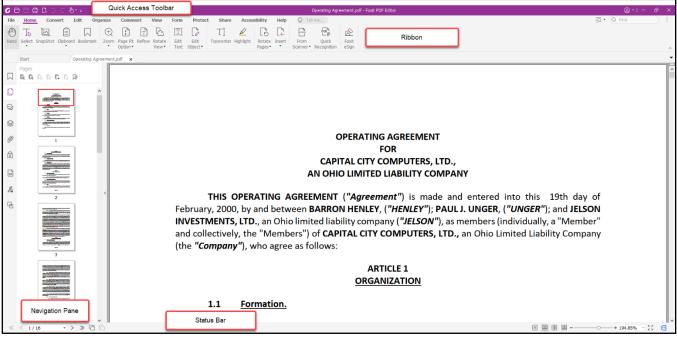


FIGURE 3-1

Main Functionality of Each Section

- Quick Access Toolbar: Shortcuts.
- **Ribbon**: Access to most commonly used features.
- **Navigation Pane**: Bookmarks, pages (thumbnail view), comments, security, forms, and digital signatures.
- Status Bar: Quick page navigation and views.

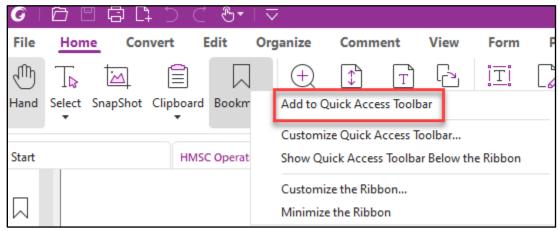


Quick Access Toolbar Customization

Perform a Function Frequently? Add it to your Quick Access Toolbar.

Option 1: Right Click

If the tool to be added to the Quick Access Toolbar is available on a ribbon, right click on the tool and select **Add to Quick Access Toolbar**.





Option 2: Add from the Quick Access Toolbar Drop-Down Menu

Click on the Quick Access Toolbar drop-down and select More Commands...

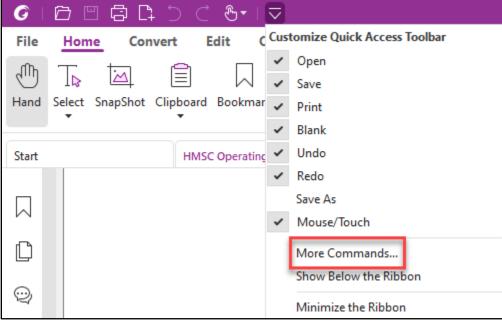


FIGURE 3-3



Choose a command and click Add.

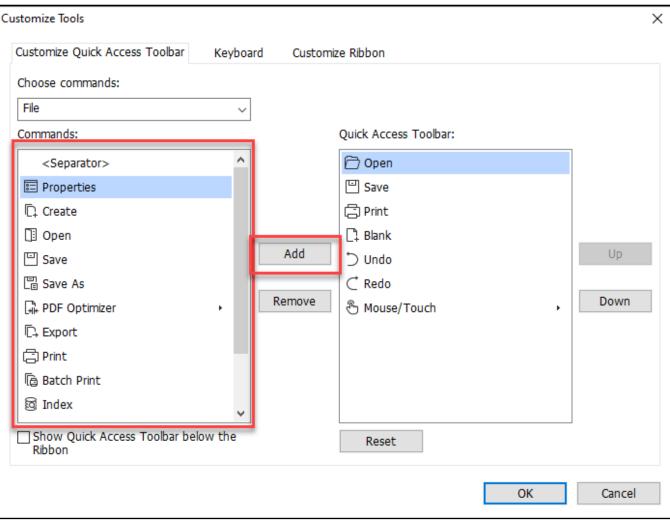


FIGURE 3-4



CHAPTER 4 CREATING PDFS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

What Can Be Converted to A PDF

If you have the right hardware and software, you can create PDFs from just about anything, including electronic files (Word, WordPerfect, PowerPoint, Excel, etc.), paper documents, web pages, email, even something you've copied to your computer's clipboard.

Creating PDFs from Microsoft Office

PDFs can be created directly from documents in Word, Excel, Outlook, or PowerPoint. There are several ways to create them, each with their own advantages and disadvantages.

Foxit PDF Ribbon (Word)

A Word document can be converted a pdf by clicking on the **Create PDF button** on the **Foxit PDF ribbon**.

File	Home	Insert	Draw	Design	Layo	ut Referen	ces	Mailings	Review	View	Help	Foxit PDF
[⊕	G	[]						C I)		
	Create and email	Merge to Foxit PDF			ark for action ~	Create Redacted ~		t PDF Editor omment ~	Advan	ced		
Create PDF				с	reate Red	lacted PDF	(Comment	General S	ettings		

FIGURE 4-1



PDF Editor will open an **Add-in window**. Select the appropriate location to save the PDF, and rename the PDF file, if needed.

Foxit PDF Editor Add-in						×
	his PC > Documents >			✓ [™]	Search Documents	
Organize 🔻 New fol						?
🖶 Downloads 🖈 ^	Name	Date modified	Туре	Size		
🔮 Documents 🖈	Custom Office Templates	11/25/2019 12:50	File folder			
📰 Pictures 🖈	Foxit files	6/22/2021 8:55 AM	File folder			
Leasing	HotDocs	12/17/2020 3:44 PM	File folder			
PDF Files	PDF Favorites	11/25/2019 12:54	File folder			
PDF Sample Doc	📊 XpressDox	3/6/2020 2:38 PM	File folder			
 Templates OneDrive OneDrive 						
This PC						
File name: Ope	rating Agreement.pdf					~
Save as type: *.pd	f					~
∧ Hide Folders					Save Can	cel .:

FIGURE 4-2

To change PDF creation settings, such as the creation of bookmarks, the **Advanced Settings button** must be clicked *prior* to clicking the **Create PDF button**.

File	Home	Insert	Draw	Design	Layou	t Referen	ces	Mailings	Review	View	Help	Foxit PDF
Create PDF	and email			Reda		Create Redacted ~	Co	L E t PDF Editor omment ∽	L Advar	ced		
	Create PDF				eate Reda	acted PDF	(Comment	General S	ettings		

FIGURE 4-3

Bookmarks: Bookmarks can be created based on the heading styles, non-heading styles (these appear at the bottom of the styles list after the heading styles), and bookmarks added to the Word document. To add bookmarks for only some heading styles, check the boxes for the desired heading styles only. Checking the **Convert Word headings to bookmarks box** will automatically check all heading styles. Heading styles can be easily unchecked in the list below.





Foxit PDF Editor Add-in X											
Settings Word Bookmarks											
Sectarigo Prote											
Convert Word headings to bookn	narks in PDF										
Convert Word styles to bookmark	ks in PDF										
Convert the bookmarks in Word to PDF bookmarks											
Element	Туре	Level	^								
Heading 1	Heading	1									
Heading 2	Heading	2									
Heading 3	Heading	3									
Heading 4	Heading	4									
Heading 5	Heading	5									
Heading 6	Heading	6									
Heading 7	Heading	7									
Heading 8	Heading	8									
Heading 9	Heading	9									
Balloon Text	Style	1									
Bibliography	Style	1									
Block Text	Style	1									
Body Text	Style	1									
Body Text 2	Style	1									
Body Text 3	Style	1									
Body Text First Indent	Style	1									
Body Text First Indent 2	Style	1									
Body Text Indent	Style	1	~								
		ОК	ancel								

FIGURE 4-4



Export As PDF (Word, Excel and PowerPoint)

A PDF can be created from the **File menu** in Word by clicking on the **Export button** and then selecting **Create PDF/XPS Document**.

Operating Agree	Operating Agreement.docx • Saved to this PC										
${}^{\bigcirc}$	Export										
斺 Home		Create a PDF/XPS Document									
🗋 New	Create PDF/XPS Document	 Preserves layout, formatting, fonts, and images Content can't be easily changed 									
🗁 Open	Change File Type	 Free viewers are available on the web 									
Info											
Save		Create PDF/XPS									
Save As											
Print											
Share											
Export											

FIGURE 4-5

This will open a **Publish as PDF or XPS dialog**. The default settings are fine for a typical legal document. However, to create bookmarks in the PDF, make the PDF conform to PDF/A



standards, or to export only part of the document as a PDF file, click on the **Options button** and select the appropriate options.

Publish as PDF or XPS					:
\leftarrow \rightarrow \checkmark \uparrow \square \ll per	sonal > ddavisroe_affinityconsulting_com > Do	ocuments >		· · ·	Search Documents
Organize 🔻 New folde	r				III - (?
^	Name	Date Modified	Туре	Size	
🖈 Quick access	ActionStep	1/13/2017 8:34 AM	Folders		
📙 8 - Signature Sta	Apps	1/7/2020 2:06 PM	Folders		
E Desktop	Attachments	1/7/2020 2:49 PM	Folders		
Exercises	Bob's Big Business	5/28/2020 12:32 PM	Folders		
Templates	Danielle @ 20078-Affinity Consulting Gro	12/13/2019 9:00 AM	Folders		
	Document Automation Administrative	10/5/2018 10:46 AM	Folders		
Microsoft Word	Documents	5/30/2018 4:41 PM	Folders		
OneDrive	Forms	9/20/2016 2:09 PM	Folders		
Documents	Microsoft Teams Chat Files	10/9/2018 12:37 PM	Folders		
Pictures	Microsoft Teams Data	10/4/2018 9:36 AM	Folders		
Pictures	Next Path	4/4/2018 10:24 AM	Folders		
💻 This PC	Notebooks	10/4/2019 7:59 AM	Folders		
3D Objects	Stotler	3/10/2020 10:58 AM	Folders		
File name: Doc1.	odf				
Save as type: PDF (*.	—				
	n file after publishing Optimize for: Other St. Or OM	andard (publishing Iline and printing) inimum size ublishing online)		Options	
∧ Hide Folders				Tools 🔻 Pt	ublish Cancel

FIGURE 4-6



Options	?	×						
Page range								
● <u>A</u> II								
O Curr <u>e</u> nt page								
 Selection 								
O Page(s) From: 1	To: 1	▲ ▼						
Publish what								
Document								
O Document showing markup								
Include non-printing information								
✓ Create bookmarks using:								
<u>H</u> eadings								
O Word bookmarks								
Document properties								
Document structure tags for acc	essibility							
PDE options								
PDF/A compliant								
Bitmap text when fonts may not	be embedded							
Encrypt the document with a pas	sword							
ОК	Can	cel						

FIGURE 4-7

Print Drivers (Word, Outlook, Excel, and PowerPoint)

A PDF can also be created from any Office product by using PDF Editor's print driver or Microsoft's PDF print driver by clicking on the **File menu** and select either **Microsoft Print to PDF**, **Foxit PhantomPDF** (version 10), or **Foxit PDF Editor Printer** (versions 11 and 12) from the list of **Printers**.

Print	Copies:	1	< >			
Printer			i			
S Foxit PDF Editor Printer						
	P	rinter Prop	perties			

FIGURE 4-8



The **Microsoft Print to PDF driver** will open a **Save Print Output As dialog** where the PDF can be named. The **Foxit PDF driver** will open the same **Save As dialog** as the **Foxit PDF ribbon**.

Creating PDFs from Individual Emails or Entire Folders (Outlook)

Select individual emails (Ctrl + left-click) or select entire folders; then click the **Selected Message** or **Selected Folder button** on the **Foxit PDF ribbon**.

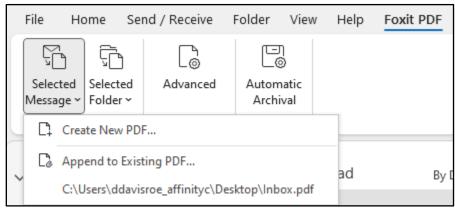


FIGURE 4-9

To create a PDF portfolio (see Chapter Chapter 10) of the emails, click on **Advanced** and check the **Output PDF Portfolio box**.

To include the email attachments as attachments to the PDF, click on **Advanced** and check the **Include Attachment box**.

Creating PDFs from PDF Editor

Convert one or more existing files into PDFs by clicking on **File**, then **Create**, then **From File** or **From Multiple Files**, then **From File** or **From Multiple Files**.

⑦ □ 白 □ □ □ ○ C & - I マ												
File Home Convert	Edit Organize	Comment Vie	ew Form	Protect	Foxit eSign	Share	Ac					
Properties	Create		Create from File									
Create		Create new PDF fr					from other file formats					
Open	- Blank											
	旧 From Temp	🖳 From Template			From File							
Save As	From File											
PDF Optimizer												
Action Wizard	From Scann	ier										

FIGURE 4-10



Select the file(s) to be converted and click **Open**. The PDF will open after a brief conversion process.

Creating PDFs from Scanners

If you have a TWAIN or WIA compliant scanner connected to your computer, then you can create PDFs from paper documents from the **File menu**, by selecting **Create**, and clicking on **From Scanner**.



CHAPTER 5 VIEWING PDFS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

There are several settings that can be changed to improve the PDF viewing experience.

Read Mode

Change to Read Mode using the **View ribbon's Read Mode button**. Read mode hides the ribbon, navigation pane, and status bar. This is often helpful to use during presentations, so you can hide busy and distracting toolbars. Press the Escape key or toggle Read Mode off using the same **Read Mode button** on the **View ribbon** to return to the main screen.

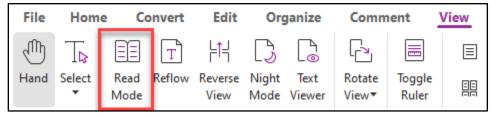


FIGURE 5-1

Read Out Loud

If the PDF is text based or the text has been recognized, PDF Editor can read the PDF using a built in speech synthesizer. Start the read aloud by clicking on **View ribbon**, click on the **Read button**, and select **Activate Read**.

Click on the **Read button** again and select **Read Current Page** to have read aloud the current page or **Read From Current Page** to have read aloud from the current page to the end of the document.

In version 10, use the **Rate and Volume buttons** to control the speed and volume at which the PDF is read.

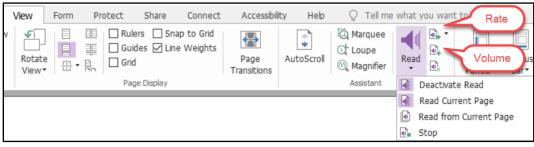


FIGURE 5-2



CHAPTER 5

In version 11, click on the **Read button** to control the speed and volume at which the PDF is read.

7	/iew	Forn	1	Pro	tect Fox	it eSign	Share	Acces	sib	oility H	lelp	Q Tell me.	
	\equiv	目	ΞΞ		$\widehat{}$	$\stackrel{\frown}{\leftarrow}$	Ð	\triangleleft)	→←	ABI II	E	
2			[]]	•	AutoScroll	Page Transitions	Assistant •	Rea	d	Compare	Word Count	View Setting▼	
								\triangleleft	Re	ad 🕨	C De	eactivate Read	
								₹₽	Sp	eed 🔹 🕨	🔓 Re	ad Current Pa	ge
								₹ <u>1</u>	Vo	lume 💦 🕨	Re Re	ad from Curre	ent Page
								2	Pa	use	1 St	ор	
								_					

FIGURE 5-3

Tabs

In PDF Editor, PDFs are opened by default in new tabs in the same window. To automatically open each PDF in its own window, go to **File**, **Preferences**, click on **Documents**, and then check the box for **Allow multiple instances**.

Preferences			×
3D ^ Accessibility Action Wizard AIP Settings Commenting Create PDF Documents	Open Sottings ✓ Allow multiple instances ✓ Alert user when documents request Full Screen ✓ In web browser, display PDF in Read Mode by default In Foxit PDF Editor, please choose the mode for Display PDF Mode:	Normal ~	^

FIGURE 5-4



CHAPTER 6 CREATING A TEXT-SEARCHABLE PDF

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Convert an Image-Only PDF to a Text-Searchable PDF

Many copier/scanners create image-only PDFs. You cannot search for particular words inside the PDF when it is image only. However, you can convert those images into searchable PDFs with a few easy steps.

First, open the PDF you want to make searchable.

In version 10, select **Home + Convert (group) + Quick OCR**. You will be prompted to save the PDF if it has not already been saved.

File	e Home	Convert	Edit	Fill & Sign	Organize	Comment	View	Form	Protect	Share	Connect	Accessibility	y Help
Hand	d Select	napShot lipboard 🔻 ookmark	Actual	Fit Page Fit Width Fit Visible	Rotat	.01% ▾ ④ te Left te Right	Edit Text	Edit Object •	T] Typewriter	Highlight	Rotate Pages •	Delete	can Quick • OCR
	Tools			Vie	W		E	dit	Comm	ent	Page Organ	ization	Convert

FIGURE 6-1

In versions 11 and 12, select **Home > Quick Recognition**. You will be prompted to save the PDF if it has not already been saved.

File	Hom	ne Cor	ivert l	Edit O	rganize	Comm	ent	View	Form	Prote	ect Fox	it eSign	Share	Acce	ssibility	Help (CTell me
Ð	T⊳	Ĭ			\oplus	\$	Т		ĪŢ		TI	\swarrow	ß	[
Hand	Select •	SnapShot	Clipboard •	Bookmark	Zoom •	Page Fit Option▼	Reflow	Rotate View▼	Edit Text	Edit Object▼	Typewriter	Highlight	Rotate Pages▼	Insert •	From Scanner •	Quick Recognition	Fill & Sign

FIGURE 6-2

Batch Process to Text Searchable PDFs

Convert multiple image only PDFs to text searchable PDFs by batch processing them.

In version 10, on the **Convert ribbon**, click on the **OCR button**, and then click on **Multiple Files**.

File	Home	Convert	Ed	it Fill 8	k Sign	Organize	Comm	ent Vi	ew Form	Prote	ect Share	Connec	t /	Accessibility	Help
 ● Hand T_P Select • ● Zoom • 	From Files •		∦ Blank	From Clipboard	From Web Page	Form	PDF Portfolio •	Combine Files	Export All Images	To MS Office •	Canto Image ▼ Canto HTML Canto Other ▼	Quick		Suspect Results •	Preflight
Tools				C	reate					Expor	t		Ba o	Current File	pliance
Sta	rt	\rightarrow	Exerc	rise - Foxit	Phanto	×							B N	Iultiple Files	

FIGURE 6-3



In versions 11 and 12, on the **Convert ribbon**, click on the **Recognize Text button**, and then click on **Multiple Files**.

File	Home	e <u>C</u>	onvert	Edit	Organize	Con	nment	View	Form	Protect	t Foxit	eSign	Share	Acc	essibility	Help	Q Tell r
Ð	T⊳	\square			£			[♪								OCR	
Hand	Select •	From Files▼	From Scanner •	From Clipboard	From Web Page	Form	PDF Portfolio▼	Combine Files	Blank	From Template	Export All Images	To MS Office▼	To Image▼	To HTML	To Other▼	Recognize Text▼	Quick Recognition
Start			НМ	ISC Operatin	g Agreement	×					•	,				密 Currer 윤 Multip	

FIGURE 6-4

1. Click on the **Add Files button** and choose **Add Files** to select individual PDFs, **Add Folder** to select an entire folder of PDFs, or **Add Open Files...** to select the currently open PDFs.

Recognize Text					×
Add files					Total 0 Files
Add Files Add Folder Add Open Files	ocation	Size	Modified	Warnings/Error	
Move up Move do	wn Remove				
Output Options				ОК	Cancel

FIGURE 6-5

2. Click on the **Output Options button...** to control whether the existing files are overwritten or where the new files should be saved and named.





Recognize Text		×
Add files	Output Options X	Total 0 Files
Name Lo	Target Folder Same folder as originals Specific Folder	Error
	File Naming	
	Insert Before Insert After + original file name+ .pdf Overwrite existing files	
Move up Move dow Output Options	OK Cancel	OK Cancel

FIGURE 6-6

- 3. Click **OK**.
- 4. Click **OK**.
- 5. To be able to edit or copy the text after processing, select **Editable Text**.



Recognize Text	X Recognize Text X
Settings Current Language Supported: Arabic Basque Bulgarian Catalan Chinese-Simplified Chinese-Traditional Selected language(s): English	Document Language Current Language Supported: Arabic Basque Bulgarian Catalan Chinese-Simplified Chinese-Traditional Croatian Czech Danish
 ○ Searchable Text Image ● s not to use this information in a fries You. Foxit maintains user login maycollect your Foxit product log iformation occurs in accordancew ○ Editable Text ● S not to use this information in files You. Foxit maintains User login maycollect your Foxit product log iformation occurs in accordancew ○ OK Cancel 	Settings Output: Editable Text Downsample To: 600 dpi

FIGURE 6-7

6. Click **OK**.



CHAPTER 7 COPYING TEXT

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

PDF Must Be Searchable in Order to Copy Text

In order to copy text from a PDF, the PDF must not be secured or locked down and it must be a searchable PDF.

Copy Text from a PDF and Insert into Word Processor

If the PDF is searchable and not otherwise secured, on the **Home ribbon**, click on the **Select button**.

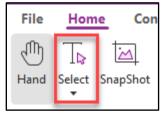


FIGURE 7-1

Select text by holding down on the left mouse button and dragging. Once the text is selected, you can copy it by right clicking and selecting **Copy** or on the **Home ribbon**, click on the **Clipboard button**, and select **Copy**, then you can go into a Word document and Paste.

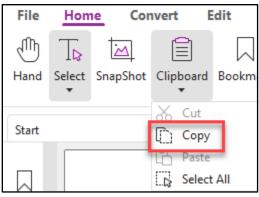


FIGURE 7-2





Convert PDF to Word Processor Document

To convert the PDF to a Word document, on the **Convert ribbon**, click on the **To MS Office button**, and select **To Word**.

File	Hom	e <u>C</u>	onvert	Edit	Organize	Cor	nment	View	Form	Protec	t Foxit	eSign	Share	Acc	essibilit
Ð	TD	\square			£			[♪ ↓	[] +			ł			
Hand	Select	From	From	From	From	Form	PDF	Combine	Blank	From	Export All	To MS	То	То	То
	•	Files▼	Scanner *	Clipboard	Web Page	•	Portfolio 🔻	Files		Template	Images	Office •	_ Image▼	HTML	Other ▼
												w To	Word		
Start			HN	ISC Operatin	g Agreemen	t ×						w To	Word 97-2	2003	
												x To	Excel		
												× To	XML Sprea	adsheet	2003
												P To	PowerPoir	nt	
												_{xPS} To	XPS		

FIGURE 7-3



CHAPTER 8 EXTRACTING PAGES

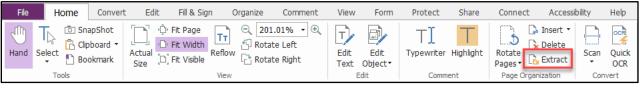
Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

If you need to create a new PDF with some of the pages of an existing PDF, you need to extract those pages. There are two primary methods of extracting pages from existing PDFs. They are can either be extracted using the **Extract button** on the **Home ribbon** or from the **Thumbnail view**

Extract Button

In version 10:

1. Click the Extract button in the Page Organization group on the Home ribbon.





- 2. Choose the page range to extract and decide whether to delete the extracted pages from the original PDF.
- 3. Click **OK**. Note that the extracted pages are not automatically saved so don't forget to save the new file before you exit.

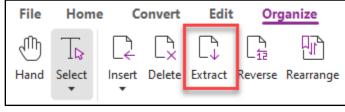


Extract Pages			×
Page Ran	ge		
Pages:	1-3	of	29
	Sample:1,5-9,12 🚹		
Extract:	Even and odd pages $\qquad \lor$		
Extract M	ode		
Extract	pages as one PDF		
OExtract	t each page as a PDF		
Immed	iately save extracted pages		
Delete	the pages after extraction		
Show I	Preview OK		Cancel

FIGURE 8-2

In versions 11 and 12:

1. On the Organize ribbon, click on the Extract button.





- 2. Choose the page range to extract and decide whether to delete the extracted pages from the original PDF.
- 3. Click **OK**. Note that the extracted pages are not automatically saved so don't forget to save the new file before you exit.



Extract Pages		×
Page Range		
All Pages		
O Pages: 1,	of	16
Sample: 1,5-9,12 🔒		
Extract: All pages in range 🛛 🗸		
Extract Mode		
Extract pages as one PDF		
O Extract pages as several PDFs by comm	na(,) sign	
O Extract each page as a PDF		
Immediately save extracted pages		
Delete the pages after extraction		
Show Preview OK		Cancel

FIGURE 8-4

Thumbnail Method

- 1. Turn on the **Thumbnail view** by clicking on the thumbnail icon located in the **Navigation Pane** on the left.
- 2. Select the pages to be extracted. (Hold down the **Shift** to select a range of pages or the **Ctrl** key to select multiple individual pages.)
- 3. Right click and Extract Pages.



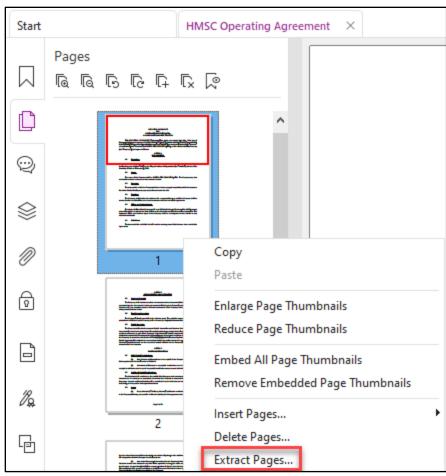


FIGURE 8-5



CHAPTER 9 COMBINING PDFS

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There are several ways to combine entire PDFs or portions of PDFs.

Thumbnail View

The Thumbnail View makes it easy to drag and drop to combine. It does not, however, automatically create bookmarks for the first page of each combined PDF.

Insert Entire PDF

This only works if tabs are turned off (see page 19).

- 1. Open the destination PDF and turn on the **Thumbnail view** by clicking on the thumbnail icon located in the **Navigation Pane** on the left.
- 2. Drag and drop the whole PDF file into the desired page position found in the thumbnail view of the open PDF.

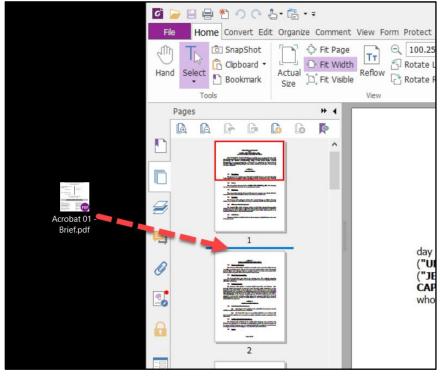


FIGURE 9-1



Insert Pages

This works if tabs are turned off (see page 19) or each PDF is manually opened in its own window.

- Open both PDFs side by side and turn on the **Thumbnail view**. If you have dual monitors, open one pdf on each monitor. If you only have one monitor, use the **Windows key** and right and left arrow keys to "snap" the PDFs side by side on your monitor.
- 2. Select the page(s) to be inserted (use Ctrl or Shift to select multiple pages).
- 3. Drag and drop the **pages** from one PDF to another.

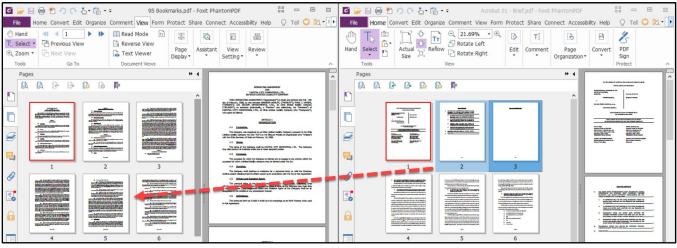


FIGURE 9-2

Insert Button

The Insert button makes it to insert pages of multiple PDF files at once. It does not create bookmarks for the first page of each combined PDF.

1. On the Home ribbon, click on Insert, then From File.

File	Hom	e Cor	nvert E	dit Org	janize	Comm	ient	View	Form	Prote	ect Fox	it eSign	Share	Acce	essibility	Help
Ð	T⊳				(+)	\bigcirc	Т		<u>i</u> Ti		TI	J.	ß	[↓		6
Hand	Select	SnapShot	Clipboard	Bookmark	Zoom		Reflow		Edit	Edit	Typewriter	Highlight	Rotate	Insert	From	Qu
						Option▼		View ▼	Text	Object▼			Pages▼	Fr	Scanner▼ rom File	кесос
Start			нмѕо	Operating A	greement	t ×									om Scanner	
														🛱 Fr	rom Web Pag	je
														🖒 Fr	om Clipboar	d
														Ē Fr	om Folder	
														E Fr	om Open Fil	es
														🗋 BI	ank Page	
Ŵ														[≞ In	to File	

FIGURE 9-3

- 2. Select the file with the pages to be inserted.
- 3. Select the pages to be inserted (the source pages) and where to insert them.
- 4. Repeat for additional files if necessary.



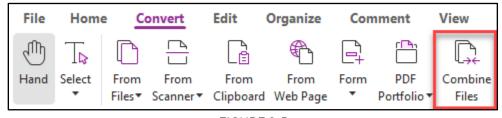
Add Files				Total 1	Files
lame	Location	Size	Туре	Added Time	Selected
MSA.pdf	C:\Users\ddavi\Desktop\	273.37 KB	Foxit Phanto	2018-11-28 2	1-2
Move Up Select Source Pag	Move Down Remove	Insert To			,
Page: 1-2	of 2	 Befor After Begin 		• of 16 • of 16	

FIGURE 9-4

Combine Files Button

The Combine Files button makes it easy to combine multiple PDFS and automatically creates bookmarks for the first page of each combined PDF.

- 1. Open one of the existing PDFs to be combined.
- 2. From the Convert ribbon, select Combine Files.





3. In version 10, click on Add Files and then Add Files.

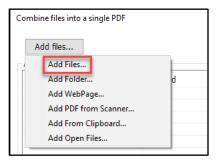


FIGURE 9-6



In version 11 or 12, click on Add Files.

File Home Convert Edit Organize Comment View Form Protect Festive Sign Share Accessibility Help Combine Files Combi	Cancel	
Add Add Add Add PDF Add Form Add Open Termore Settings More More * Up Dom Start MASC Operating Agreement Comptile Files × Add File File Setting File Setting Files Add Form Add Open Termore Setting File Setting	Cancel	~
Add files by clicking the button below or drag and drop the files here.		
Add files by clicking the button below or drag and drop the files here.		
	22463%	٥

FIGURE 9-7

- 4. Select the desired files and click **Open**. The selected files will be added to the list.
- 5. To insert specific pages (rather than all pages) from the PDF, click on the **Choose Pages button**.

Ve	rsion	10:

Combine files into a	single PDF						_		\times
Add files								Total 2	Files
Arrange your files				1		1			
Name	Modified	Range	Size	Bookmark for	Bates Numbe	Warnings/Errors	Location		
📓 Maritalized	2018-11	ALL	2.19 MB	Maritalized Re			C:\Users\dda	ivi∖D	
🕵 MSA.pdf	2018-11	ALL	273 KB	MSA			C:\Users\dda	ivi∖D…	
Move up	Move dov	vn	Remove	Choose Pages					
					-				
Add a new tab	le of content	s page conve	erted from bo	ookmarks					
Retain the logi	c page numb	er during con	nbination						
					-	Combine	d	ose	1

FIGURE 9-8



Versions 11 and 12:

		Name	Operation	Modified	Page Range	Size	Bookmark for File
٠	C .	Operating Agreement.pdf	Choose Pages	2021-10-21 14:17:29	ALL	292 KB	Operating Agreement
6	5. 5	Select the desired page	es and click	on OK .			
Cho	ose F	Pages					×
	ţ	Pages: 1-20, Sample:1,5-9,12 (1) Subset: All pages in range	~	/ 20	man skillerin. mini timel mi timel mi timel mi timel mi timel mini timel	., civiti	The Art of States and
					<u>1</u>		20 Pages

FIGURE 9-9

7. Then click **Combine**.

L



Version 10:

Name	Modified	Range	Size	Bookmark for File	Bates Numbering	Wa
🔊 Exhibit1.pdf	2007-06-12 08:41:46	ALL	643 KB	Exhibit1		
🔊 Exhibit2.pdf	2007-06-12 08:41:50	ALL	746 KB	Exhibit2		
🔊 Exhibit3.pdf	2007-06-12 08:41:58	ALL	126 KB	Exhibit3		
🖉 Exhibit4.pdf	2007-06-12 08:42:00	ALL	249 KB	Exhibit4		
Exhibit5.pdf	2007-06-12 08:42:00	ALL	131 KB	Exhibit5		
C						>
Move up Move	e down Remove					

FIGURE 9-10

Version 11:

	File	Hom	e Con	vert Edit	Organi	ize Con	nment	View	Form	Pro	otect S	hare	Accessibility	Help	Combine Files
Add Add Add PDF Add Remove Settings Move Move Combine Close Files Folder WebPage from Composition Close Image: Close Image: Close			Add	Add PDF	Add From	Add	Remove		Move	Move	Combine				

FIGURE 9-11

Version 12:

File	Hon	ne Coi	nvert Edit	orgar	nize C	omment	View	Forn	n Pro	otect	Foxit eSign	Share	Accessibility	Help	Combine Files	Q Tell me	EQ ▼ Q Find	÷
C,	C7			Êļ	[4		윤	日个	∃↓									
Add			Add PDF													Combine	Cancel	
Files	Folder	WebPage	from Scanner	Clipboard	Files		•	Up I	Down									~

FIGURE 9-12

File Menu

- 1. Under File, select Create → Combine Files → Combine Files button.
- 2. Follow the steps above to combine the files.



File	Home	Convert	Edit	Organize	Comment	View	Form	Protect	Foxit eSign	Share	A
Prop	perties		(Create				Combine	e Multiple File	es.	
Crea	ate							Combine N	Iultiple Files into	a single P	DF
Ope	n			라 Blank							
Save				🖳 From Ten	nplate			Combine l	Files		
Save	e As			From File							
PDF	Optimizer										
Actio	on Wizard			From Sca	nner						
Expo	ort			ြရ From Mu	Itiple Files						
Print	t			Combine	Files						

FIGURE 9-13

File Explorer

This method works if all of the files to be combined are stored in the same folder.

- 1. Open the folder with the files in File Explorer.
- 2. Select the files to be combined (use Ctrl or Shift click to select multiple files).
- 3. Right-click and select **Combine files in Foxit PhantomPDF** (version 10) or **Combine file sin Foxit PDF Editor...** (versions 11 and 12).

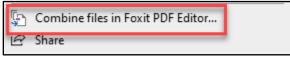


FIGURE 9-14

- 4. Reorder the files using the **Up and Down buttons** if necessary.
- 5. Click on the **Combine button**.



CHAPTER 10 PDF PORTFOLIOS

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Portfolios let you collect a set of documents relating to a particular topic for convenient distribution. A portfolio is superior to a package because it can contain sub-folders and documents of differing file types (packages contain only PDF files in a single folder level). Portfolios can be managed by a modern Flash-based user interface. This interface lets you view the pages not only of PDF files in the portfolio, but additionally pages of Word, Excel, PowerPoint and a wide range of image files. These are displayed in a separate window.

Create a PDF Portfolio

1. Select File → Create → PDF Portfolio → Portfolio.

File	Home	Convert	Edit	Organize	Comment	View	Form	Protect	Foxit eSign	Share	Accessibility
Proj	perties		(Create				Create PE	OF Portfolio		
Crea	ate							Create a ne	w PDF Portfolio	from mult	iple types of files
Оре	en			ြို Blank				Ē			
				From Tem	plate			Portfolic			
Save				From File							
PDF	Optimizer							Create a bla	ank PDF Portfolio	_	
Acti	on Wizard			From Scar	nner					5	
	ort			From Mul	tiple Files			Blank			
Prin	t			Combine	Files			Portfolio	þ		
Bate	ch Print			ြို From Clip	board						
Inde	ex			From Web	Page						
Sha	re				2						
	ert			Form							
Clos	se			PDF Portfo	olio						

FIGURE 10-1

- 2. Select one or more existing files and click **Open**.
- 3. Click **Create**.



- 4. You can add additional files, add the whole contents of existing folders, or create new folders that you will fill by:
 - clicking the corresponding button, or
 - dragging and dropping files or existing folders onto PDF Portfolio Window.

File	Home	e C	onvert	Edit	Orga	anize	Comme	nt Vie	w Form	Protect	Fox	it eSign	Share	Accessibility	Help	Portfolio
☐ Layout	Details	Cover	Preview	Default	Add	Add	Add Open	Add From	Add PDF From Scanner	Add From	Create	Regenerate				



5. Documents added to the portfolio can be viewed either as thumbnail pictures or as a detailed list view. Switch from the **Thumbnail view** to **List view** and back using the **Layout** and **Details buttons**.

File	Home	e C	onvert	Edit	Orga	anize	Comme	nt Vie	w Form	Protect	Fox	tit eSign	Share	Accessibility	Help	Portfolio
Ħ		G		ලි			[""	£			[₀	Ē				
Layout									Add PDF From Scanner							
									FIGURE 1	0-3						

6. To reorder the files, drag and drop them in either view.



CHAPTER 11 REDUCING PDF FILE SIZE

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

If you create PDFs that are too big to file with the court or to email (in terms of megabytes), it will make it difficult for people to download or work with them. If doing electronic court filing, breaking the PDFs into parts (part 1 of X, part 2 of X, etc.), makes the PDFs harder to navigate. Therefore, it's important that you understand how to create smaller PDFs initially and how to compress existing PDFs.

Create Smaller PDF Files

PDFs created from a Word processor will be smaller than files created from a scanner. Whenever possible, create PDFs directly from the Word processor. If the PDF is still too large, there are settings within the Foxit PDF Editor ribbon and print driver that can help reduce the file size.



Word Processor

When creating a PDF by printing to PDF, clicking on the **Printer Properties** link will provide an option to switch the default size, which can be reduced to **Smallest File Size** if needed.

F F	oxit PDF Editor Printer P	roperties			×
Setti	ing Layout				
	Foxit Conversion Setting	js			
	These setting	gs are suitable for creating PDF files used for web d	istribut	ion.	
	Default Settings:	Smallest File Size	~	Edit	
1	Color:	Color	~		
	Resolution:	500	\sim		
	View PDF Results				
	Destination				
	Target Folder:	Prompt for file name	\sim	Browse	
	If File Exists:	Prompt User	\sim		
			(OK Cance	el

FIGURE 11-1

Scanner

File size when you scan a document to a PDF is impacted by three things: 1) color mode, 2) dpi and 3) number of pages.

- **Color Mode**: Most scanners will allow you to scan in color, black and white or grayscale. Even if the document you're scanning has no color in it, the resulting scanned document will be very large if you scan with color mode set to color. The same thing is true with grayscale. To keep file size small, you want your scanner's color mode set to black and white.
- **DPI**: DPI stands for dots per inch and this is the resolution your scanner is set to. The higher the dpi, the better the quality. However, as you increase dpi, you also increase file size. Most



scanners can scan from 100 to 1,200 dpi. Generally, the best balance between quality and file size is 300 dpi.

• **Number of Pages**: The more pages you scan, the bigger the resulting file size. If you scan at 300 dpi black and white and the file is still too large, then there are still ways to reduce the file size as described below.

Compress Existing PDF

- 1. Open the PDF to compress.
- 2. Under the File menu, click PDF Optimizer, then Reduce File Size, then Current File

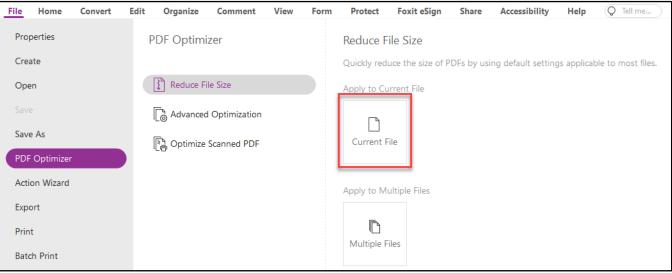


FIGURE 11-2

3. Save the reduced PDF with a new file name when prompted.



CHAPTER 12 SPLITTING A PDF

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

If the PDF cannot be reduced to the necessary size, the PDF will need to be split into multiple smaller PDF files. PDFs may be split for other reasons, but file size is the most common reason.

Determine the Size of Your PDF

Open the PDF in PDF Editor click the **File > Properties > Description tab** and you'll see a **Show More Information link** at the bottom. Click on the link to get the file size.

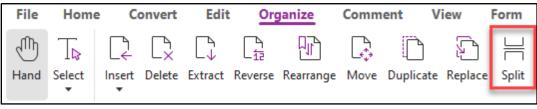
File Home Convert I	Edit Organize Comment View	Form Protect Foxit eSign	Share Accessibility Help Q Tell me
Properties	Properties	Description	
Create		General	
Open		File	s\ddavisroe_affinityc\Desktop\PDF - Operating Agreement.pdf
Save	🖹 Initial View	PDF Version	PDF-1.7
	a_ Initial view	Fast Web View	No
Save As	Security	Tagged PDF	Yes
PDF Optimizer		Page Size	[8.50 * 11.00 inch]
Action Wizard	🔚 Fonts	Pages	16
Export	{ဝ်} Advanced	Title	HMSC Operating Agreement
Export	~	Subject	add a subject
Print		Creator	Microsoft® Word for Microsoft 365
Batch Print		Author	Danielle DavisRoe
Index		Producer	Microsoft® Word for Microsoft 365
index		Keywords	HotDocs Template
Share			
Revert		Custom	
Close		Related Dates	
		Last Modified	2022-07-20 13:05:31
Preferences		Created	2022-07-20 13:05:31
Skins		Show More Information	

FIGURE 12-1



Split a PDF

To split a PDF into two or more PDF files, open the desired PDF and select **Organize ribbon + Split**.





Split Options

PDF files can be split by number of pages, file size, bookmarks, or blank pages.

Split Document			×
Select More Files			
Split document by			
Number of pages	Max pages:	1	
⊖ File Size	Max MB:	1.00	
○ Page Range (Sample	e: 1, 2-7, 8-10)	0	
		of 464	
O Top-Level Bookmark	S		
⊖ Blank Page			
Output Options		OK Cancel	

FIGURE 12-3

- **Number of pages**. This splits the PDF into separate files with a specific number of pages. The last file created may contain fewer pages.
- **File Size.** Use this option to split a PDF file into separate parts that do not exceed a specific file size. This is useful when emailing or e-filing PDFs with file size limitations.
- Top-Level Bookmarks. Splits the document at top level bookmarks.
- Blank Page. This splits the PDF whenever there is a blank page in the file.

To change where the results PDF files are saved or how they are named, click on **Output Options**.



CHAPTER 13 EDITING AND ANNOTATING PDFS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Typewriter Tool

Add text to any PDF (unless restrictions prevent it) at any location on the document using the typewriter tool.

1. Select **Home → Typewriter**.

File	Hom	e Cor	ivert	Edit Org	ganize	Comm	ent	View	Form	Prote	ect Foxi
Ð	T⊳		Ê		(+)	\$	Т		<u>i</u> Ti		T
Hand	Select •	SnapShot	Clipboard •	Bookmark	Zoom •	Page Fit Option▼		Rotate View▼		Edit Object▼	Typewriter

FIGURE 13-1

2. In version 10, change text properties (such as font) prior to typing from the **Comment Format ribbon**.

G 📄	🖶 粒	<u>ን</u> ር• ይ•	- -			Exercise - Fox	it Phantoi	mPDF - Split	ting.pdf * - I	Foxit Phant	omPDF			Free Text Tools
File	Home	Convert	Edit	Fill & Sign	Organize	Comment	View	Form	Protect	Share	Connect	Accessibility	Help	Comment Format
Helvet B I	ање Х ²				■ = = = # # \$			=- =	Start of line End of line					~
	Fo	nt		Pa	aragraph		S	hape Style						

FIGURE 13-2



In versions 11 and 12, change the text properties (such as font) prior to type from the **Format pane**. If this pane does not open automatically, click on the arrow to expand it.

File	Hom	ne Cor	nvert E	Edit Org	ganize	Commo	ent	View	Form	Prote	ect Foxi	t eSign	Share	Acce	ssibility	Hel	р	Q Tell m	ie	<u>=Q</u> • (0	λ Find	\supset :
Hand	∏⊳ Select	SnapShot	Clipboard T	Bookmark		Page Fit Option▼	T Reflow	Rotate View▼	<u>T</u> Edit Text	Edit Object▼	T] Typewriter	<u>/</u> Highlight	Rotate Pages▼	Insert •	From Scanner •	Q	cR 47 uick gnition	✓ Fill & Sign				^
Start			HMS	C Operating A	greement	* ×										•	Form	nat ×				
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FIGURE 13-3

3. Click on the desired location to insert text and start typing.

Comments

Comments are an excellent way to add annotations to documents when reviewing or marking them up. The basic comment toolbar in Adobe Acrobat Reader, which is probably what most users/clients would use to review a document, is easy to use and can display all the comments made via Foxit PDF Editor. The Comment ribbon contains the following groups and tools:



FIGURE 13-4

Comment Types

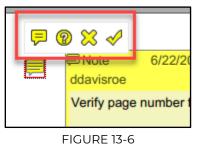
• Note (aka "Sticky Note"): Place a note box on the page at a defined location and type in a note. Later the note box can be closed, leaving only a Note icon.



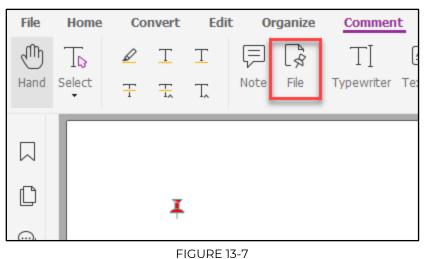
File	Home	Con	vert	Edit	Org	janize	Commen	t Vie	w
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		F	-	ote visroe	6/22/2	2021 10	:33:50 AM ⊠ Options →		
u Q			Veri	fy page	number	for cita			

FIGURE 13-5

In versions 11 and 12, change the Note icon by clicking on it and selecting a different icon.

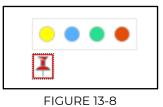


• **File**: Attach a file to the PDF at a specific place, marked by a pushpin. The attached file can then be opened by double clicking on the pushpin.





In versions 11 and 12, change the color of the push pin by clicking on it and selecting a new color.



• **Text Box and Callout**: Add a text box above other content on the PDF page. A callout works the same way but adds a line with an arrow.

File	Home	Со	nvert	Edit	t Or	ganize	Commer	nt Vie	w For
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Comment Summary

Create a summary of all comments in the current document by clicking on **Summarize Comments** on the **Comment ribbon**. Choose to print or save just the summary, or print it together with the document pages with a choice of layouts to the comments with their location



in the document. Below are some recommended choices, but it will really depend on how you want the comments summarized (on one sheet, multiple sheets, etc.)

Create Comment Summary		X
Layout	 Document and comments with connector lines on separate pages Document and comments with connector lines on single pages Comments only Document and comments with sequence numbers on separate pages Document and comments with sequence numbers on single pages 	
	Include Pages	
Comment Type: All	Al pages	
Paper Size: Letter	✓ ○ Visible pages	
Font Size: Medium	\checkmark O From 1 \checkmark to 12 \checkmark	
Sort comments by: Page	✓ Pages containing no comments	
	OK Cancel	

FIGURE 13-10

Formatting Comments

In version 10, when using a commenting tool, a contextual ribbon for that tool will appear. Edit the appearance of the comments from the contextual ribbon.

🖸 🗁 🗄 🖶 🏷 🔿 🕓 🖕 =	Exe	rcise - Foxit Phantor	mPDF - Splitting.pdf * -	Foxit Phanto	mPDF			Free Text Tools
File Home Convert Edit	Fill & Sign Organize Co	omment View	Form Protect	Share	Connect	Accessibility	Help	Comment Format
Helvetica \checkmark 9 \checkmark B I U abe X ² X, $\underline{A} \checkmark \underbrace{A}$ \underline{T} , \checkmark Font	HE • HE • ■ = = = = HE • E ↓ = ↓ = ↓ = ↓ = ↓ = ↓ = ↓ = ↓ = ↓ = ↓	Line Opacity Color	Image: Start of line Image: Style					



In version 11 or 12, when using a commenting tool, a Format pane for that tool will appear. Edit the appearance of the comments from the contextual ribbon.

Other Mark Up Tools

• **Text Markup Tools:** Apply these markup styles to selected text to highlight, underline, or cross out the text.

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Ŧ	Ŧ	T,							
FIGURE 13-12									

• **Drawing Tools**: Choose a drawing tool from the drop-down list and use it to draw the desired object. Right-click with the **Hand** tool on an object to modify its properties.



Convert to Word, Excel, or PowerPoint

To convert a PDF into a Word, Excel, or PowerPoint document, click on appropriate button on the **Convert ribbon**.

File	Hom	e <u>Co</u>	onvert	Edit	Organize	Cor	nment	View	Form	Protect	t Foxit	eSign	Share	Acc	essibility
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Hand	Select	From	From	From	From	Form	PDF	Combine	Blank	From	Export All	To MS	То	То	То
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FIGURE 13-13

The resulting document will need the formatting cleaned up. Be sure to double check that you are not missing any content after the conversion.



CHAPTER 14 ELECTRONIC "IMAGE" STAMP SIGNATURE

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Create The Stamp

Instead of printing a PDF, signing it, and then re-scanning the image, consider adding a signature image stamp to the PDF. Here are the steps:

- 1. Sign a piece of blank paper.
- 2. Scan the signature crop the large unwanted areas and save as a JPEG or other compressed common graphic file format (PNG, etc.). Note the location where it is saved.
- 3. On the Comment ribbon, click on the Create button, and select Create Custom Stamp.

File	Home	C	onvert	Ed	it O)rganize	Comm	ent	View	Form	Prote	t F	oxit eSign	Share	Acces	sibility H	Help	Q Tell	me			
J.	T⊳	\square	Т	Τ	Ę	8	ΤI	A≡	Þ		D	\Diamond		Eð	i↔i		e	<u>4</u>	\square	÷	$\overline{}$	Ç.
Hand	Select	Ŧ	Ŧ	T,	Note	File	Typewriter	Textbox	Callout	Drawing •	Pencil	Eraser	Area Highlight	Search & Highlight	Measure •	Accounting Calculator	Stamp •	Create	Summarize Comments		Export •	FDF via Email
Start	Start HMSC Operating Agreement * ×																					
	ද් _{යි} Manage Stamps දුලි Paste Clipboard Image as Stamp Tool																					
	다음 Show Stamps Palette																					
										_												

FIGURE 14-1

4. Browse to the saved location, create a group and name (if desired) to organize your signatures.





	Homer Simpson	File: Category: Name:	Y:\Document Departmer Signatures Homer Simpson	Browse
--	---------------	-----------------------------	--	--------

FIGURE 14-2

5. To insert the signature into the PDF, select the stamp tool from the gallery and the desired stamp. Move your mouse (signature) where you want it to appear and click.



CHAPTER 15 BOOKMARKS AND LINKS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

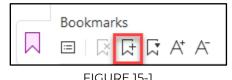
You can create bookmarks and links in your PDFs so recipients/reviewers of the PDF can more easily navigate the PDF.

Creating Bookmarks

1. In **Navigation Pane**, you'll see an icon for bookmarks. Just click on it to reveal the bookmarks in your document (if any). In version, the **bookmarks button** looks like this:

 \mathbb{D} . In versions 11 and 12, it looks like this: $igsymbol{arphi}$

- 2. Select the text in the document for which you would like to create the bookmark.
- 3. Right-click it, then click on the Add Bookmark button.



- the bookmark. You can now navigate back t
- 4. Adjust the name of the bookmark. You can now navigate back to that spot by click the bookmark name in the Bookmark panel on the left side of the document.

Bookmark Customizations

Change the Order of Bookmarks

If your bookmarks aren't in the order you want in the bookmark pane, simply click on one and, holding down on your left mouse button, drag it into the correct position.

Change the Format of the Bookmark Link

By right-clicking on a bookmark in the Bookmarks pane, and clicking on **Properties**, you can also make a bookmark bold, italic, or bold & italic. By default, they're "plain."



Making Bookmarks Visible Immediately Upon Opening a PDF

If you want the bookmarks to be visible when the judge or someone else opens your brief, click on **File → Properties → Initial View**. Under the top dropdown, select "Bookmarks Panel and Page."

File Home C	onvert Edit	Organize	Comment	View	Form	Protect	Share	Accessibility	Help	Q Tell me			
Properties		Properties				Initial Vi	ew						
Create						Layout and	d Destinatio	on			_		
Open			on			Navigation 1	and Page	•					
Save		Initial View	N			Page Layout	t	Default	Default 👻				
Save As		0.0				Magnification	n	Default			•		
PDF Optimizer		ିନ୍ତି Security				Open to pa	ge	1 0	f 16				

FIGURE 15-2

Also note that you can control the initial page layout, magnification and what page a PDF opens to.

Creating Tables of contents

You can create a table of contents based on the bookmarks in a PDF.

- 1. Open the **Bookmarks panel**.
- 2. In the Bookmarks panel, click on the Options button 🖃, and select New TOC from bookmarks.

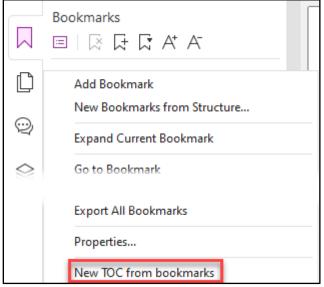


FIGURE 15-3



3. Choose the number of levels to display and click **OK**.

Add a new content of table	×
• Select the bookmark levels that should be converted into items in the table of contents.	
Base level	
Level 1	
Level 2	
Level 3	
☑ Level 4	
\bigcirc Convert all bookmark levels into items in the table of contents.	
OK Cancel	

FIGURE 15-4



CHAPTER 16 WATERMARKS

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

PDF Editor's watermark feature is a graphic or word(s) displayed as a faint background (usually light gray), so it can easily be seen by readers, but it isn't so dark that one cannot read the text. Most often it is used to clearly identify to the reader that the document is a draft.

Create a New Watermark

1. On the Organize ribbon, click on the Watermark button, and select Add.

File	Hom	e C	onvert	Edit	Or	ganize	Comm	ent	View	Form	Pro	tect Foxi	it eSign	Sha	re A	ccessibilit	y Help	Ô
Ð	T⊳		C _×				L.	\square				¦at⊡	ß	[]		là	//	[.ø
Hand	Select	Insert •	Delete	Extract	Reverse	Rearrange	Move	Duplicat	e Replace	e Split	Swap	Interleaving	Rotate Pages▼		Resize Pages	Flatten	Watermark	Backgrou •
													ruges	ruges	ruges	1	- Add	
Start				HMSC Op	perating A	greement *	\times										() Update	
	Bookm	arks															Remov	e All

FIGURE 16-1



2. Enter the text for the watermark and change the appearance settings (such as font, font size, color, and rotation) as needed.

Add Watermark	x
Saved Settings: [None specified] ~ Delete Save Settings	Preview
© Text:	Preview Page:
Font: Helvetica Size: T O File: Browse Browse Page Number: 1 Absolute Scale: 100%	OPERATING AGREEMENT GATTAL CITY COMPUTERS, I.TD., AN OHIO LINTIED LABALITY COMPANY THIS OPERATING AGREEMENT ("Agreement") in order and ensured into this 19th drug of features, 2000, by and boxeen BARGEN HENLEY. ("HENLEY") BAUL, A UNKERN ("AND THE AND THE AND THE ADDRESS AND THE ADDRESS AND THE ADDRESS ("ADDRESS AND THE ADDRESS AND THE ADDRESS AND THE ADDRESS AND THE CADITAL CITY COMPUTERS, ITD., an Ohio Limited Liability Company"), who agree as liability:
Appearance Rotation:45° None @ 45° Custom 45° • Opacity: 50% • Scale relative to target page 50% • Location: @ Appear behind page Appear on top of page Appearance Options Position Vertical Distance: 0.00 • Inches from Center v Horizontal Distance: 0.00 • Inches v from Center v	<section-header><section-header><section-header><section-header><section-header><text><text><section-header><text><text><text><text><text></text></text></text></text></text></section-header></text></text></section-header></section-header></section-header></section-header></section-header>
Page Range Options	OK Cancel

FIGURE 16-2



CHAPTER 17 FLATTENING PDFS

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If you use the Typewriter tool, electronic signatures or any of the annotation tools described previously and send that PDF to someone who owns advanced PDF editing software, they'll be able to select your annotations, move or delete them. Flattening a PDF means to move these annotations into the main layer of the PDF so that they will always print and cannot be easily selected, deleted, or moved.

There are two ways to flatten PDFs:

Print to PDF

Open the PDF, click **File menu → Print →** choose the **Foxit PhantomPDF printer** (version 10) or **Foxit PDF Editor Printer** (versions 11 and 12). This is creates multiple copies of the same PDF.

Flatten File Button

On the **Organize ribbon**, select **Flatten**. Select the desired pages and then **OK**. Then **Save** your PDF again.

File	Hom		onvert									tect Foxi				
Ð	T⊳	[}	\Box_{X}^{A}	[↓			C.	\square	۶ ۲			240	ß	C#		a
Hand	Select T	Insert •	Delete	Extract	Reverse	Rearrange	Move	Duplicate	Replace	Split	Swap	argent and a second se	Rotate Pages▼	Crop Pages	Resize Pages	Flatten

FIGURE 17-1



CHAPTER 18 **REDACTION**

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Importance of Proper Redaction

The importance of properly redacting a document cannot be understated. **Using the Redaction tools, as described in this chapter, is the only proper way to redact information.** Any other method may result in the disclosure of redacted information. One merely needs to read the news to see prominent attorneys in trouble for improperly redacting documents.

Save a Copy First

Start by creating a copy of your PDF. **Redactions cannot be undone unless the PDF is closed without saving changes.**

Text-Searchable PDF: Search and Redact

To search for text and redact, select Protect ribbon + Mark for Redaction + Search and Redact.

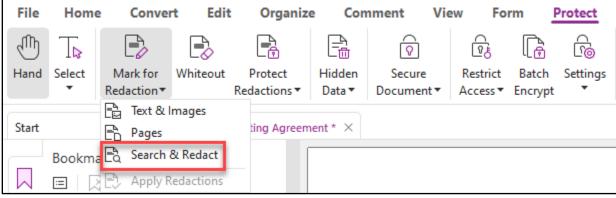


FIGURE 18-1



Set your search terms in the **Search pane**.

Format Search X	
Where would you like to search?	
In the current PDF document	\sim
📃 Desktop	\sim
Match exact word or phrase	~
What word or phrase would you like to sea	arch
for?	
John Doe	\otimes
	\otimes
John Doe	
John Doe Whole Words Only	۲
John Doe Whole Words Only Case-Sensitive	٢

FIGURE 18-2



Redact Area

1. Mark your redactions next. Select **Protect ribbon + Mark for Redaction + Text & Images**.



2. To redact a region or area, using your mouse, simply click and drag over an area, as represented in the larger red rectangle below.

STEVEN R. SCHOENY	Historic Commis
	Review Applica
City of Columbus Departme	nt of Development Historic Preservation Office 50 W. Gay :
APPLICANT INFO	RMATION (please type or print legibly)
Property Address	Street, Columbus, OH 43205
Applicant Name*	aul J Unger
* If the applicant is not th	he owner, s/he must be authorized by the owner to co

FIGURE 18-3



Redaction Properties

To change the redaction properties, right click in the redacted area and click on **Properties**. You can change the redacted area fill color or add overlay text.

earance General Revie	ew History
Redacted Area Fill Color:	Use Overlay Text
Overlay Text	
Font: Helvetica	\sim
Font Size: 10 \sim	Font Color:
Text Alignment: 💿 📄	
Auto-Size text to fit	redaction region
Repeat Overlay Text	- :
Oustom Text:	
Redaction Code:	
Code Sets:	Code Entries:
U.S. FOIA U.S. Privacy Act	(b) (1) (A) (b) (1) (B) (b) (2) (b) (3) (A) (b) (3) (A) (b) (3) (B) (b) (4) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c
Add Selected Entry	/ Edit Codes

FIGURE 18-4

Apply Redactions

To apply the redactions, **Protect ribbon → Mark for Redaction → Apply Redactions**. The redactions cannot be undone unless you exit the document without saving your changes.

File	Home	e Conve	rt Edit	Organize	e Con	nment Vie	ew Fo	rm _	Protect
Ð	T⊳	Ð	B			$\widehat{\bigtriangledown}$	1		61
Hand	Select •	Mark for Redaction▼	Whiteout F	Protect Redactions •	Hidden Data ▼	Secure Document▼	Restrict Access ▼	Batch Encrypt	Settings ▼
Start		Text & Te	lmages & Redact	ting Agreem	ent * ×				
			edactions						

FIGURE 18-5



AI Powered Redaction

Foxit Smart Redact, an optional add-in for PDF Editor, makes it faster to redact documents using the power of AI. You can learn more at <u>https://www.foxit.com/smart-redact/</u>.



CHAPTER 19 SECURITY FOR PDF FILES

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

When creating PDF documents from within PDF Editor, authors can use password security to add restrictions that can prevent a document from being opened, printed or edited.

Password Security

- 1. To apply security to a PDF, under the File menu, select Properties, then Security.
- 2. Change Security Method from No Protection to Password Protection.

File	Home	Convert	Edit	Organize	Comment	View	Form	Protect	Share	Accessibility	Help	Q T
Pro	perties		F	Properties				Security				
Crea	ate								word Protec	tion		
Оре	en			Description	on			Pass Pass	word Proced	-0011		
Sav	e			Initial View	v			Change Se Documen	_	ns Summary		
Sav	e As			ି Security				Printing			Allov	ved
PDF	[:] Optimizer							Changing t	he Documer	nt	Allov	ved

FIGURE 19-1

3. You can add password protection to open the document and passwords to print or change the document in this screen. Also note that you can prevent copying of text, images or other content by clicking on the **Permission button**.





ssword Protection		
Document Open Settings		
Require a password to open the document		
Password Input:	Password Confirm:	
Document Restriction Settings		
Add Document Restriction		
Password Input:	Password Confirm:	
Permission Specification		
Printing: High Resolution		
Accessibility: Allowed		Permission
Copying: Allowed		Permission
Changes: Any except extracting pag	les	
Encrypt Settings		
Encryption Algorithm: 🔘 128-bit AES	○ 256-bit AES ○ 128-I	bit ARC-FOUR
Don't encrypt metadata		
	ОК	Cancel
Save the settings as a new policy	UK	Cancel

FIGURE 19-2



CHAPTER 20 ELIMINATING PDF HIDDEN CONTENT

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People often mistakenly assume that PDFs have no metadata. This is not true. In fact, PDF Editor has a feature which allows you to easily find and remove hidden information from a document that you don't want, such as hidden text, metadata, comments, and attachments.

To remove metadata, in version 10 click on the **Protect ribbon + Sanitize Document**.

ize Cor	nment	View	Form	Protect	Share	Connect
	i	•			Co Security	
Sanitize Document		Hidden Hidden	Password Protect	Certificate Protect	Remove	Properties
Hit	den Data			Secure [Document	



In versions 11 and 12, click on Protect ribbon + Hidden Data + Sanitize Document.

File	Home	e Conver	t Edit	Organize	Con	nment V	iew Fo	rm <u>F</u>	Protect
Ð	TD		Ð		Pa -	R	ef.		fi
Hand	Select •	Mark for Redaction▼	Whiteout	Protect Redactions▼	Hidden Data▼	Secure Document •	Restrict Access ▼	Batch Encrypt	Settings •
Start			HMSC Op	erating Agreeme		itize Documen nove Hidden Ir			

FIGURE 20-2



CHAPTER 21 FILLABLE FORMS

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Draft the Background Form

First, create the background form by either (1) creating it in a program like Microsoft Word or Publisher and saving it as a PDF, or (2) scanning it and saving it as a PDF.

You will get a much cleaner and crisper quality document if it is re-created electronically in Word or Publisher and then printed or saved as a PDF.

Once you have the underlying document converted to PDF, you will be ready to add the form fields in PDF Editor.

Detect Form Fields

To convert an existing PDF to a fillable form, on the **Form ribbon**, click on the **Run Form Field Recognition button**.

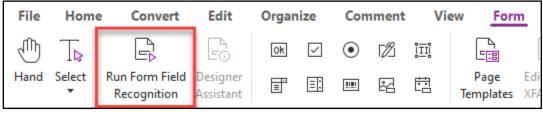


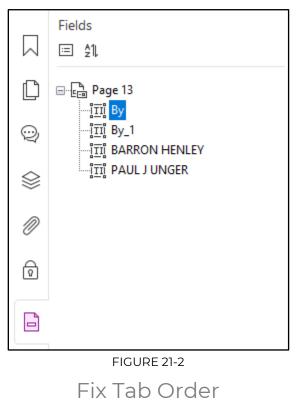
FIGURE 21-1

PDF Editor will automatically detect fields in the PDF and add form elements to those spaces. Some manual cleanup will typically be required.



Clean Up the Form

Once the fields have been added, the easiest way to manage them is from the **Manage Form** Fields panel.

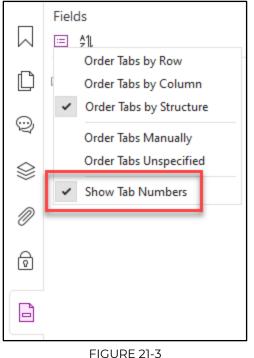


The Tab Order is the sequence in which your cursor moves from field to field when you hit the tab key on your keyboard.

1. Open the Manage Form Fields panel. See Figure 21-2 above.



2. Click on the Set order button or right-click on any field and click on Show Tab Numbers.



3. Drag and drop the fields in the Manage Form Fields panel to reorder them.

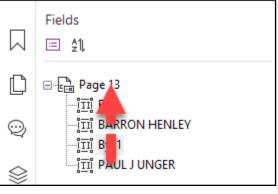


FIGURE 21-4

Format Fields Properly

To change the formatting of any field, right-click on it in the **Manage Form Fields panel** to open the properties. From here you can change the font, font size, and other formatting options.

Name Fields Properly

PDF Editor looks at the text of the form to guess what fields should be called, and it isn't always right. If you see any fields that do not have useful names, right click on them in the **Manage Form Fields panel** to open the properties and rename them as appropriate.

Add A Submit Button to Your Form

Your form can be distributed to recipients via email and the completed PDF can be emailed back to you (rather than the form itself). To create the submit button, follow these steps:



1. Add a new button.

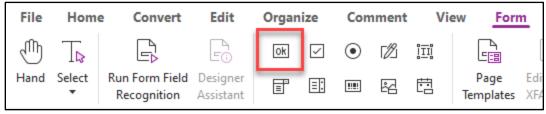


FIGURE 21-5

2. Double click the button you've made and the Button Properties dialog will appear. On the **Options tab**, give the button a **Label**.

Button Properties		X
General Appearance	Position	Options Actions
Layout: Lab	el Only	✓ Advanced
Behavior: Pus	h	~
Icon and Label		
State:	Label:	Submit Form
Up Down Rollover	Icon:	Choose icon
		Clear
Locked		Close



3. On the Actions tab, select the "Mouse Up" trigger, select the "Submit a form" action and click the Add button.

utton Prop	perties					
General	Appearance Po	osition Options	Actions			
Add	an Action					
	Select Trigger:	Mouse Up		\sim		
	Select Action:	Submit a form		\sim	Add	

FIGURE 21-7



4. When you click Add, you'll see the following dialog. Choose **PDF (whole file)** which is the default. Then enter the email address under the Submission Method.

Submit a form	×
Submit a form Export Format Field data Field data KFDF Include: Field data Field data Field data Comments Field data Field data Comments Field data Field d	 Field Selection All fields Selected fields 20 2 a resident residing at 2 at County State of County State of1 day of Executed this I I1 Signature Signature1 Signature2 Y that
	OK Cancel

FIGURE 21-8

5. Now click the **OK** button, then the **Close button** at the bottom of the dialog.



CHAPTER 22 HEADERS, FOOTERS, & BATES NUMBERING

Can't find it? Something missing? Instructions not clear? Email manuals@affinityconsulting.com.

Headers and footers are often included in PDFs to add bates numbering, simple page numbering, or document content.

Headers and Footers

To add a header or footer (see below for Bates numbering) to a PDF:

1. Organize ribbon → Headers & Footers button → Add.

File	Home	Cor	nvert	Edit	Org	janize	Comm	ent V	iew	Form	Pro	tect Foxi	t eSign	Shai	re A	ccessibili	ty Help	Q Tell	me	
Ð	T⊳		[₽ ×	$[]_{\downarrow}$			L.	\square				240	ß	[]		l	//	[]		$\begin{bmatrix} \mathbf{A} \\ \# \end{bmatrix}$
Hand	Select	Insert [Delete	Extract	Reverse	Rearrange	Move	Duplicate	Replace	e Split	Swap	Interleaving	Rotate	Crop	Resize	Flatten	Watermark	Background	Header &	Bates
	•	•											Pages▼	Pages	Pages		•	•	Footer 🔻	Numberir
																			슈 Add	
Start				HMSC Op	erating A	greement *	×												(') Upda	e
																			Remo	ve All

FIGURE 22-1

2. Select the desired font and font size.

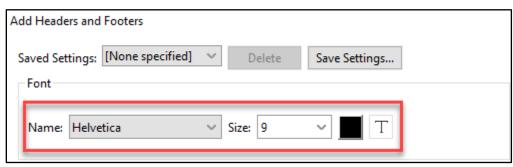


FIGURE 22-2

3. Place the cursor in the appropriate position - left aligned, centered, or right aligned in the header or footer.



Add Headers and Footers			×
Saved Settings: [None specified] V Dele Font Name: Helvetica V Size: Appearance Options	Save Settings 9 ✓ ■ I ■ Embed Font	Margin (Inches) Top: 0.50 Left: 1.00	
Left Header Text	Center Header Text	Right Header Text	
		^ ~	$\hat{}$
Left Footer Text	Center Footer Text	Right Footer Text	- 1
Ç		^	$\langle \rangle$
Show Preview Macros: Page Number ~	Insert Page num	ber and date format Page Range Options	

FIGURE 22-3

4. To add page numbering or document information, such as the file name, click on the **Macro button** and select the appropriate option.

Left Header Text	Center Header Text	Right Header Text
↓	^ ~	< >
Left Footer Text	Center Footer Text	Right Footer Text
< >	< >	< >
Show Preview Macros: Page Number V Date File Name Preview Page: 1	Insert Page number and date	e format Page Range Options

FIGURE 22-4

5. To change how dates or page numbering is formatted, click on the **Page number and date format button** and make the appropriate changes.

Macros: Page Number 🗸	Insert	Page numbe	r and date format	
	Page Number an	d Date Forma	t	×
		Date Format:	m/d	~
	Page Nur	nber Format:	1	~
	Start P	age Number:	1	•
~~~~~~		l l	ОК С	ancel

#### FIGURE 22-5



- 6. Click on the Insert button to insert the text.
- 7. If inserting static text, type the text directly in the appropriate text box (for left aligned, centered, or right aligned text in the header or footer).
- 8. If the contents of the PDF need to be shrunk to make space for the header and footer, click on the **Appearance... link** and check the box.

Add Headers and Footers	
Saved Settings: [None specified] V Delete Save Settings	
Font	Margin (Inches)
	Top: 0.50 🗭 Bottom: 0.50
Name: Helvetica V Size: 9 V T	Left: 1.00 🗭 Right: 1.00
Appearance Options Left Header Text	×
<<1>> Shrink document to avoid overwriting the document's text and	d graphics
Keep position and size of header/footer text constant when pr	inting on different page sizes
Left Footer Text	OK Cancel

FIGURE 22-6

#### **Bates Numbering**

Bates numbers appear as headers or footers on the pages of each PDF in the batch.

- 1. Open the desired PDF.
- 2. Select Organize ribbon > Bates Numbering button > Add.
- 3. Add any files to the list that you want to Bates Number and click **OK**.

rrange Your Files				Total 2 File(
Name	Location	Size	Modified	
B-Hospital Visi	C:\Users\ddavi\Desktop\P	9.68 KB	2007-12-27 13:41:16	
C-Bisys Form	C:\Users\ddavi\Desktop\P	216 KB	2007-03-14 23:33:20	
Move Up	Move Down Rer	nove		

FIGURE 22-7



- 4. Select desired font.
- 5. If you want to shrink the document to make room for the Bates number, select **Appearance Options**, and check **Shrink document to avoid overwriting the document's text and graphics**.
- 6. Place your cursor inside the Right Footer position (or whatever desired location) and click **Insert** (be sure it is set to the Bates Number Macro (see below screen shot).
- 7. Click **OK.**

Add Headers and Footers					$\times$	
Saved Settings: [None sp	pecified] 💙 Delete Save Settings					
Font		Margin	(Inches)			
N	V Size: 9 V	Тор: (	0.50 🔶	Bottom: 0.50	•	
Name: Helvetica	✓ Size: 9 ✓ <u> </u>	Left: 1	1.00 🗘	Right: 1.00	•	
Appearance Options	Appearance Options				×	
Left Header Text						
	Keep position and size of header/footer text constant when p		-	res		
		·····				
Left Footer Text			OK	Cancel	_	
Show Preview Macr	ros: Bates Number V Insert Page number and date	: format	<u>Page</u> F	Range Options		

FIGURE 22-8



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