

# Foxit PDF Reader For Windows

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Anti-Grain Geometry - Version 2.3

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## **Chapter 1 - Introduction**

#### **Foxit PDF Reader Overview**

Foxit offers two packages of Foxit PDF Reader (EXE and MSI). Foxit PDF Reader (EXE) is a free PDF document viewer which enables users to view, annotate, sign and share PDF files. Foxit PDF Reader (MSI) is developed on the basis of Foxit PDF Reader (EXE), but it is equipped with advanced solutions such as AIP Protection, GPO Control and XML Control to meet the needs of enterprise and government organizations for security protection and mass development. This User Manual explains more in depth on the capabilities and functions of Foxit PDF Reader. For more information on the deployment of Foxit PDF Reader (MSI), please refer to "Foxit PDF Reader Deployment and Configuration".

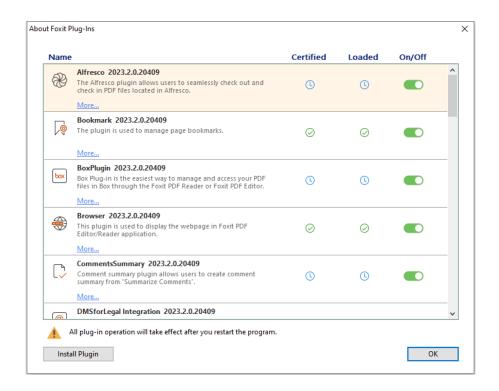
#### Foxit PDF Reader Add-ons

Foxit PDF Reader provides separate add-ons on the <u>Foxit website</u> for you to download ondemand. Most of the add-ons, including JPEG2000/JBIG Decoder, Spell Checker, and Firefox Plugins, have been integrated into Foxit PDF Reader package, so users don't need to install them again after the installation of Foxit PDF Reader. But if there're any upgrades of those add-ons, users can go to **Help** > **About Foxit PDF Reader** > **Check for Update** to download and install the latest add-ons.

## Foxit Plug-In Platform

For flexible and convenient management of plugins, Foxit PDF Reader offers a Plug-in Platform that allows you to view the plug-in status, learn the information about the plugins installed, as well as manage the plug-ins needed.

To open the Foxit Plug-in Platform, please choose **Help** > **Foxit Plug-Ins**, and the window will show up as below.



**Foxit Plug-in Platform** 

#### **Plug-in Status**

Foxit PDF Reader lists the plug-ins that have been installed in the **About Foxit Plug-Ins** windows. Some plug-ins will be loaded the first time you use the related features. When the plug-in is successfully loaded, a checkmark will be displayed in the **Loaded** column. You can view the plug-in status in the following two columns:

- Certified: Shows whether the signature of the plug-in is valid or not.
- Loaded: Shows whether the plug-in has been loaded successfully or not.

#### **Plug-in Information**

In addition to plug-in status, you can learn more information about the plug-in installed, including the name, date, description and legal copyright.

To learn the details of a plug-in, please click **More** under the general description of the plug-in shown in the Foxit Plug-in Platform. Then a dialog box showing the details of the plug-in will pop up.

#### **Plug-in Management**

With the Foxit Plug-in Platform, you can manage the plug-ins as needed, including installing, enabling, disabling, and uninstalling plug-ins.

#### **Installing a Plug-in**

Foxit PDF Reader allows you to install a plug-in in FZIP format. You can also install one or more plug-ins by using an XML file. An XML file defines the information about plug-ins to be installed, and should be used together with .fpi files.

- Select Help > Foxit Plug-Ins to open the Foxit Plug-In Platform.
- Click Install Plugin in the About Foxit Plug-Ins dialog box.
- In the Open dialog box, do one of the following:
  - ➤ To install a plug-in in FZIP format, select **FZIP Files (\*.fzip)** from the file type drop-down list beside the **File name** box, choose the file from your local disk, and click **Open**. When the installation completes, click **OK**.
  - > To install one or more plug-ins by using an XML file, select **Plug-in File (\*.xml)** from the file type drop-down list, choose the XML file from your local disk, and click **Open**. Then Foxit PDF Reader will verify whether the signature of the plug-in is valid or not. If it is valid, Foxit PDF Reader will load the plug-in. Otherwise, the installation will be terminated.

Tip: If you install plug-ins by using an XML file, please place the .xml file and .fpi files in the same folder to avoid an installation failure.

#### **Disabling a Plug-in**

To disable a plug-in, please follow the steps below:

- Select **Help** > **Foxit Plug-Ins** to open the Foxit Plug-in Platform.
- Select the plug-in you want to disable, and switch its **On/Off** toggle to Off.

#### **Enabling a Plug-in**

To enable a plug-in, please follow the steps below:

- Select **Help** > **Foxit Plug-Ins** to open the Foxit Plug-in Platform.
- Select the plug-in to be enabled, and switch its **On/Off** toggle to On.

#### **Uninstalling a Custom Plug-in**

To uninstall a custom plug-in (not built by Foxit), please follow the steps below:

Select Help > Foxit Plug-Ins to open the Foxit Plug-in Platform.

• Select the plug-in to be uninstalled, and click the **Uninstall** button to uninstall it.

For a plug-in that has been uninstalled, you can click the **Undo Uninstall** button to reinstall it.

#### Note:

- 1. All the operations to the plug-ins will take effect after you restart Foxit PDF Reader.
- 2. Foxit PDF Reader includes plug-ins that are necessary for the realization of its functionalities or are necessarily required for maintenance. To ensure normal operation, you are not allowed to disable or uninstall these plug-ins (such as Foxit Updater plugin, Foxit Plug-in Platform plugin, etc.)

## **Chapter 2 - Getting Started**

This section gives you an overview of Foxit PDF Reader and how to install or uninstall, upgrade, as well as customize work area and toolbar.

## **Installing Foxit PDF Reader**

## **Windows System Requirements**

Foxit PDF Reader runs successfully on the operating systems listed below. (If your computer does not meet these requirements, you may not be able to use Foxit PDF Reader.)

#### **Operating Systems**

- Windows 10
- Windows 11
- Verified as Citrix Ready® with Citrix XenApp® 7.13

#### **Recommended Minimum Hardware for Better Performance**

- 1.3 GHz or faster processor (x86 compatible) or ARM processor, Microsoft SQ1 or better
- 512 MB RAM (Recommended: 1 GB RAM or greater)
- 1 GB of available hard drive space
- 1024x768 screen resolution
- Supports 4K and other high-resolution displays

## How to Install?

Please visit <u>Foxit's website</u> to download the latest version of Foxit PDF Reader for free. And then follow the steps below to install Foxit PDF Reader.

- Double-click the installation file and you will see the Install Wizard pop up. Click **Next** to continue.
- To install Foxit PDF Reader on your system, you are required to accept the terms and conditions of Foxit's License Agreement. Please read the agreement carefully and then check I accept the agreement and click Next to continue. If you cannot accept the agreement, please click Cancel to exit the installation.

- Foxit PDF Reader will be installed under the default path: C:\Program Files\Foxit Software\Foxit PDF Reader. If you want to change the location, please click Browse and set the installation path. Then click **Next** to continue.
- In the standard installation, all the listed components will be installed. Check the components to be installed and change the selections if necessary. Then click **Next** to continue.
- Select the additional tasks that you would like to perform while installing Foxit PDF Reader, and click Next.
- Specify the Safe Reading Mode setting, and click **Next** to continue. Tip: It is recommended to enable Safe Reading Mode as it enables you to control unauthorized actions and data transmissions to avoid attacks from malicious documents. You can also change the setting in File > Preferences > Trust Manager after the installation.
- Check the choices you made and click **Install**.
- Finally, a message will appear to inform you the successful installation. Click Finish to complete the installation.

#### **Command-line Installation**

The Foxit PDF Reader properties are:

.....

/COMPONENTS < list of features > The value of the /COMPONENTS property is a comma

delimited list of features which the installation of Foxit PDF Reader will make available locally. Foxit PDF Reader installer defines the following features:

pdfviewer - Foxit PDF Viewer and its components.

ffaddin - A Plugin used for opening PDF files in Internet Explorer. This feature requires pdfviewer to be installed.

ffSpellCheck - Spell check tool which is used for searching any misspelled words in typewriter or form filler mode and suggesting the correct spellings. This feature requires pdfviewer to be installed.

ffse - Plugins for Windows Explorer and Windows shell. These extensions allow PDF thumbnails to be viewed in Windows Explorer, and PDF files to be previewed in Windows OS and Office 2013 (or a later version). This feature requires pdfviewer feature to be installed.

Specifies the folder where products will be installed.

The value of the /TASKS property is a comma delimited list of features which the installation of Foxit PDF Reader will make available locally. Foxit PDF Reader installer defines the following features:

**desktopicon** - Installer will place a shortcut for the installed

/DIR

/TASKS < list of features>

application on Desktop.

**startmenufolder** - Installer will create program menu group for installed application and its components.

**Quicklaunchicon** - Installer will place a shortcut for the installed application on the Quick Launch Toolbar.

**setDefaultReader** - Foxit PDF Reader will be set as the default PDF reader.

**DisplayInBrowser** - Foxit PDF Reader will be configured to

open PDF files inside browsers.

**/force** Forces to install Foxit PDF Reader.

/clean Removes all of Reader's registry data and related files.

**/DisableInternet** Disables all features that require an Internet connection.

/displayadobeindoc Opens embedded PDF files in Microsoft Office with Foxit PDF

Reader if Acrobat and Foxit PDF Editor is not installed.

**READ\_MODE** Opens PDF file in Read Mode by default in web browsers by

setting the value to "1".

**DISABLE\_UNINSTALL\_SURVEY** Stops the Uninstall Survey after uninstallation by setting the value to "1".

#### Command-line Examples:

1. Silently install the application (no user interaction) to folder "C:\Program Files\Foxit Software", install ffse component and create desktop icon only:

"Foxit PDF Reader.exe" /COMPONENTS="ffse" /TASKS=" desktopicon" /DIR=" C:\Program Files\Foxit Software" /verysilent

## **Updating Foxit PDF Reader**

Foxit PDF Reader and add-ons can be updated in several ways. Some updates are available if you open a PDF document that triggers the updating process. Other updates are available from the **Help** tab, where you have to manually install them. However, all updates can be downloaded directly from Foxit website. Foxit PDF Reader supports autoupdate checking. By default, with any update to the application or plugins detected, Foxit PDF Reader will prompt users to update. You can change the default preference setting for updating Foxit PDF Reader in **File** > **Preferences** > **Updater**.

## **Updating from the Help Tab**

- 1. Choose **Help > About Foxit PDF Reader > Check for Update** in the pop-up window.
- 2. In the pop-up dialog box, select updates from the column on the left, and then click **Download and Install**.

## **Use Foxit Updater**

- 1. Choose **File > Preferences > Updater**.
- 2. Check the appropriate option according to your requirements.
  - Automatically install updates: Foxit PDF Reader regularly checks for updates and downloads them automatically when there are available updates. Next time you launch the application, the updates will be installed automatically.
  - Automatically download updates, but let me choose when to install them (recommended): the system will automatically download and display a message informing you of the upgrade and allowing you to choose to upgrade to the new version. This option is checked by default.
  - Do not download or install updates automatically: never download or install updates automatically.
- 3. Click OK.

## **Updating From Foxit Website**

- 1. Visit Foxit Download Center.
- 2. Select and download the files or add-ons you want to update.
- For an add-on in FZIP format, click Help > Foxit Plug-Ins > click Install Plugin in the pop-up About Foxit Plug-Ins dialog box to install it; for an add-on in MSI format, double-click it to install it.

**Note:** You can save the customization and settings and apply them in the new version after upgrading.

## **Uninstalling Foxit PDF Reader**

#### **How to Uninstall?**

Please do one of the following:

For Windows 10, click Start > the Foxit PDF Reader folder > right-click Foxit PDF
 Reader and choose Uninstall. For Windows 11, right-click Foxit PDF Reader in the app

list after clicking **Start**, and then choose **Uninstall**.

- Uninstall from Control Panel. Go to Control Panel, choose Programs > Programs and Features > select Foxit PDF Reader and click Uninstall/Change. (Tip: To open Control Panel, type "Control Panel" in the search box on the taskbar and select Control Panel from the results.)
- For Windows 10, click Start > Settings > Apps > Apps & features > Foxit PDF Reader > Uninstall. For Windows 11, choose Start > Settings > Apps > Installed Apps, then
   click beside Foxit PDF Reader and choose Uninstall.
- Double click the Uninstall shortcut under the Foxit PDF Reader installation directory drive.

**Note:** A short survey window will pop up when Foxit PDF Reader is uninstalled, in order to collect suggestions for improvement.

## **Online Help**

You can get online help about how to read and work with PDF files from within Foxit PDF Reader using the Help Center, Content-sensitive Help, or Support Center.

## **Help Center**

Help Center helps you navigate top help topics and get help online. To access the Help Center, please click **Help** > **Help Center**. In the Help Center, you can find topics by groups based on the features, or input a keyword in the **Search** box to search for any desired

topic. While reading the help contents, you can click



to move back to the previous

view, or click



to return to the Home Page of the Help Center.

To get help online about a specific topic, you can also click in the <u>Search field</u> on the title bar, input the keywords, and choose "**<keywords>"** under **Get Help on** from the dropdown menu. Foxit PDF Reader will open the Help Center and list all the topics that match your keywords. Then you can navigate through the search results and open the article to learn more about the function.

## **Content-sensitive Help**

Content-sensitive Help assists users by providing help based on a specific task they perform. This enables users to get specific information about whatever feature of the application they are using at the given moment.

To access Content-sensitive Help:

Hover your mouse over a button, and you will see the tip which gives you the basic instruction of the feature. If Foxit PDF Reader contains additional help about the feature, you can click **Tell me more** to learn more about it in the Help Center.

## **Support Center**

Foxit PDF Reader offers an AI-powered customer support tool called Support Center, which acts as an AI chatbot and can provide personalized assistance based on your specific needs. Utilizing natural language processing and machine learning algorithms, the AI chatbot can understand user queries and respond with answers. It can assist you in using a specific function or performing certain tasks by providing step-by-step instructions based on Foxit resources, such as Foxit Knowledge Base. (*Tip: The AI chatbot is enabled by default. If you want to disable the feature, choose File > Preferences > General > Application Startup, check Disable Support Center under Application Startup, and restart the application.)* 

To access AI chatbot, choose **Support Center** in the **Help** tab, or click on the lower right corner of the application window. Then, you can input your questions and interact with the AI chatbot in the **Support Center** panel displayed on the right side of the application window.

In addition, you can also click the icon at the top of the **Support Center** panel and select **Submit Ticket** to send your bug reports/suggestions/comments.

## **Work Area**

#### **Work Area Overview**

Foxit PDF Reader opens in two different ways: on its own (as a standalone application) and in a web browser. The associated work areas slightly differ.

The Foxit PDF Reader work area includes a document pane that displays PDFs and a navigation pane on the left side that helps you browse through the current PDF. Toolbars

near the top and bottom of the window provide other controls that you can use to work with PDFs, including toolbar pane, tab bar and status bar.

#### The Work Area for PDFs Open in the Application

You can double-click the Foxit PDF Reader icon on the desktop to start the program, and choose **File** > **Open** to open a PDF file from local disks or cloud services. For more information about the work area, please refer to <u>Toolbar and Commands</u>.

#### The Work Area for PDFs Open in a Web Browser

You can open and view PDFs in web browser with Foxit PDF Reader if you have set Foxit PDF Reader as the default PDF viewer.

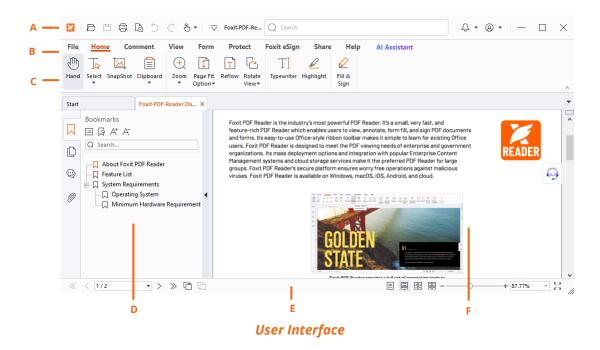
- Open a web browser application.
- Select a PDF anywhere on the Internet and click the link.
- The PDF will be opened by Foxit PDF Reader directly in the web browser.

Tip: In a web browser, Foxit PDF Reader will display PDFs in Read Mode by default, hiding the toolbars to maximize the document pane. You can right click the document pane and uncheck **Read Mode** to show the toolbars and work on PDFs as desired.

#### **Toolbar and Commands**

#### **Toolbar Overview**

Foxit has integrated the collective commands in the ribbon interface and created a new way of working, namely Ribbon Mode. Ribbon Mode is developed based on Microsoft Office 2013 (Office 15) to provide you with a familiar and intuitive user experience. In this mode, commands are arranged by groups and tasks. Below are some of the highlights of the new interface.



**A.** Title Bar **B.** Tab **C**. Command **D.** Navigation Pane (Bookmark Panel displayed) **E.** Status bar **F.** Document Pane

- > **Title Bar**: a horizontal bar at the top of the application window. It displays the Quick Access Toolbar, software title, current file name, search field, buttons to minimize/maximize/close the app, etc. The search field on Title Bar allows you to search commands, text, or online help based on the keywords you specified.
- > **Tab Bar**: shows the major tabs of Foxit PDF Reader, being classified as File, Home, Comment, View, Form, Protect, Share, and Help.
- **Command Bar**: categorizes the commands by groups according to the function.
- Navigation Pane: contains various navigation panels. See also Navigation Panels.
- > **Status bar**: shows the status information about the current open document.
- Document Pane: shows the document content.

#### **Search and Find Commands**

The Search field on the title bar (sits at the top of the window) enables you to search commands, text or online help based on the keywords you specified. To quickly find a command, click in the Search field (or press Alt + Q), and input the command name. Then from the drop-down menu, you can select the command from the Actions group to activate the desired feature. You can also find the commands that you have searched and used recently from the Recently Used group in the drop-down menu to re-activate the corresponding features with ease.

#### **Touch Mode**

Touch mode makes it easier to use Foxit PDF Reader on touch devices. In touch mode, the toolbar buttons, commands, and panels are slightly shifted apart for easier selection with your fingers. To switch to touch mode, please click on the Quick Access Toolbar, and choose **Touch Mode**. While in touch mode, you can click and choose **Mouse Mode** to return to the mouse mode.

## **About Navigation Pane**

The navigation pane, located next to the document pane, can display different navigation panels, including Layer panel, Attachments panel, Pages panel, Comments panel, Bookmarks panel, Security Settings panel, Articles panel, and Digital Signatures panel. Please note that the navigation pane is unavailable when Foxit is open but empty (no PDF is open).

The buttons on the left side of the navigation pane provides easy access to various panels, such as the Bookmarks panel button  $\square$ , the Pages panel button  $\square$ , and the Layers panel  $\bowtie$ . After right-clicking the navigation pane, you can select and open more panels.

- To show the navigation pane, use keyboard shortcut F4, or click View > View Setting >
  Navigation Panels > Show Navigation Panels, or right-click on the page and choose
  Show Navigation Panels.
- To hide the navigation pane, use keyboard shortcut F4, or click View > View Setting > Navigation Panels > Hide Navigation Panels, or right-click on the page and choose Hide Navigation Panels. You can also right-click on the title of the navigation pane and select Hide Navigation Panels to hide the navigation pane.
- To open a navigation panel, you can either click its button on the left side of the navigation pane, or choose **View** > **View Setting** > **Navigation Panels** > [navigation panel name]. (**Tip**: By default, Foxit PDF Reader displays the Bookmarks, Pages, Comments, and Attachments buttons on the left side of the navigation pane. You can right-click on the left side of the navigation pane to find more options from the context menu.)

## **Adjusting the Navigation Pane**

The navigation panels can be docked in the navigation pane or they can float anywhere in the work area of Foxit PDF Reader. You can choose to hide or close the panels that you don't need and open the ones you do. What's more, you can also adjust the width of the navigation pane easily.

#### 1. Viewing a Panel in the Navigation Pane

By default, all the panels dock in the navigation pane with a set of panel buttons appearing on the left side of the work area.

Do one of the following:

- Select the button for the panel on the left side of the navigation pane.
- Right-click on the left side of the navigation pane, and choose the desired option from the context menu.
- Choose View > View Setting > Navigation Panels > [panel name].

#### 2. Changing the Display Area for Navigation Pane

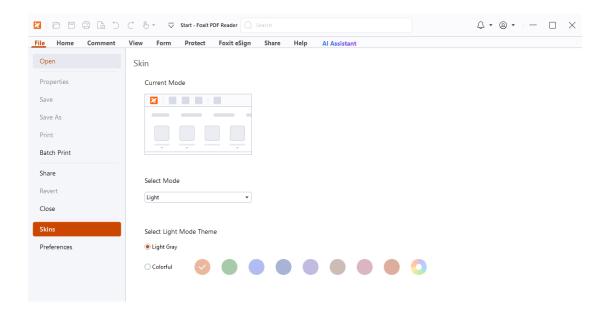
Put the cursor anywhere along the right border of the navigation pane, you will find the cursor turns into . Then you can directly click on the right border to minimize or maximize the navigation pane, or drag the right border to adjust the width of the navigation pane.

#### 3. Docking or Floating a Navigation Panel

- To float a navigation panel, drag the panel button into the document pane.
- To move a panel, drag it by its panel button to another location.
- To dock a floating panel, double-click its title bar.
- To group two floating panels, drag the title bar of one panel into the other floating panel.

## **Setting the Skin**

Foxit PDF Reader provides three modes (**Light**, **Dark**, and **System**) that allow you to customize the look (skin) of the software. To change the skin, choose **File** > **Skins**, and then select the desired options from the **Select Mode** drop-down list. If you choose **System**, the skin automatically switches to the **Light** or **Dark** mode according to the default app mode (Light or Dark) set in your Windows system. When you are in the Light Mode, you can check **Colorful** in the **Select Light Mode Theme** group to specify the theme color for your application.



## **Customizing the Work Area**

As you get acquainted with Foxit PDF Reader, you can set up your Reader work environment. The more you learn about its potential, the more you can take advantage of its features, commands, and options.

There is much more to the application than you see at first glance. Foxit PDF Reader has hidden commands and preferences that can enhance your experience and give you greater control over how your work area is arranged and displayed.

#### **Customizing Quick Access Toolbar**

Quick Access Toolbar displays all your bookmarked commands. You can add commands that will let you view and search content easily to your Quick Access Toolbar. This is another way for you to arrange and manage all the commands.

To add a command to guick access toolbar, please follow the steps bellow:

- > Click on the Quick Access Toolbar, and select **More Commands**. Or right-click the ribbon area and choose **Customize Quick Access Toolbar**.
- In the **Customize Tools** dialog box, choose the **Customize Quick Access Toolbar** tab.
- Select the commands or separators you preferred to be shown on Quick Access Toolbar and add them to the Quick Access Toolbar list. Click **Up** or **Down** to arrange the command order and then click **OK**.

To return toolbars to default configuration, repeat the steps above to open the **Customize Quick Access Toolbar** tab in the **Customize Tools** dialog box, choose **Reset**, and click **OK** to apply the setting.

**Tips**: You can also right-click a command in the ribbon and choose **Add to Quick Access Toolbar** to add the command to Quick Access Toolbar.

#### Show Quick Access Toolbar below/above the Ribbon

To show Quick Access Toolbar below/above the ribbon area, do any of the following:

- > Click on Quick Access Toolbar, and select **Show Below the Ribbon** or **Show**Above the Ribbon.
- ➤ Right-click the ribbon area and choose **Show Quick Access Toolbar Below the Ribbon** or **Show Quick Access Toolbar Above the Ribbon**.
- ➤ Open the Customize Tools dialog box. In the Customize Quick Access Toolbar tab, select the Show Quick Access Toolbar below the Ribbon option.

#### Working with the Ribbon

- > To collapse the Ribbon, click ^ at the bottom-right corner of the Ribbon.
- ➤ If you want to use a command after collapsing the Ribbon, you can click the tab and then choose the desired command. The Ribbon will be collapsed, but the command will remain selected.
- ➤ If you want to keep the Ribbon visible after collapsing it, click a Ribbon tab to display the Ribbon, then click → at the bottom right corner of the Ribbon.

#### **Customizing the Ribbon**

The Ribbon is designed to help you find the commands in an easy and convenient way. From Version 7.0 and on, Foxit PDF Reader give you the capability to personalize and customize the Ribbon in the way you want. With this feature, you can customize the default Ribbon, and create custom tabs or groups with your preferred commands.

To customize the Ribbon, right click the Ribbon, choose **Customize the Ribbon** from the context menu to bring out the **Customize Tools** dialog box, and then follow the steps below.

#### Create a new tab

To create a new tab, please do one of the following:

Select the tab which you want to add the new tab after, and then click **New Tab**.

> (Alternatively) Right click the tab which you want to add the new tab after, and then choose **New Tab** from the context menu.

#### Add a new group to a tab

To add a new group to a tab, please do one of the following:

- > Select the tab which you want to add the group to, and then click **New Group**.
- (Alternatively) Right click the tab which you want to add the group to, and then choose **New Group** from the context menu.

#### Rename a tab or group

- > Select the tab or group that you want to rename, and then click **Rename**.
- > (Alternatively) Right click the tab or group to be renamed, and choose **Rename** from the context menu.
- In the **Rename** dialog box, input the new name and click **OK**.

#### Add commands to a group

- > Select the group which you want to add a command under.
- > Choose the category that the command is under and then the desired command from the **Choose command from** list.
- Click Add to add the selected command to the desired group.

#### Remove a tab, group or command

To remove a tab, group or command, please do one of the following:

- Select the tab, group or command to be removed, and click **Remove**.
- > (Alternatively) Right click the tab, group, or command to be removed, and select **Delete** from the context menu.

#### Reorder the tabs or groups

To reorder the tabs or groups, please do one of the following:

- Select the tab or group you want to reorder, then click the Up or Down arrow to move accordingly.
- (Alternatively) Right click the tab or group you want to reorder, and then select Move Item Up or Move Item Down to move accordingly.

#### **Reset the Ribbon**

Click Reset in the Customize Tools dialog box to reset the Ribbon to the default settings.

#### Import a customized Ribbon

- Click Import.
- In the **Open** dialog box, select the Ribbon customization file (.xml file), and click **Open**.

**Note**: After importing a Ribbon customization file, you will lose all the arrangements you customized previously. If you want to revert to the previously customized Ribbon, it is recommended to export the customized Ribbon before importing a new one.

#### **Export a customized Ribbon**

- Click Export.
- In the **Save As** dialog box, specify the file name and path, and then click **Save**.

#### Note:

- 1. After customization, you need to click **OK** in the **Customize Ribbon** tab to save and apply your changes to the Ribbon.
- 2. To help you distinguish a default tab or group from the customized selections, the custom tabs or groups in the **Customize the Ribbon** list are tabbed with "(Custom)" after the name (like this: New Tab (Custom) ), but without the word "(Custom)" on the Ribbon.
- 3. The commands in the default group under a default tab are displayed in grey, and they cannot be renamed, reordered, or removed.
- 4. You cannot remove default tabs in Foxit PDF Reader.

#### **Customizing Shortcut Keys**

People's habits using the keyboard are different and the familiarity to the buttons on a keyboard is distinct. The intellectualized Foxit PDF Reader allows you to customize the shortcut keys for both commands and subcommands on the Ribbon according to your habit, which enables you to use the shortcuts more conveniently than before.

To customize shortcut keys, please follow the steps below:

ullet Click  $\overline{\ }$  on Quick Access Toolbar > select **More Commands**. In the pop-up

Customize Tools dialog box, select Keyboard tab.

- Choose the command's category in the Categories list and the action in the Command list.
- Input the appropriate shortcut with your keyboard. Click **Assign** to apply the shortcut. If you want to change the shortcut, just input the new one to replace it directly. The **Reset All** button can recover the default setting.

**Note:** The shortcut keys that have already being used cannot be reassigned. A message under the input tab will show you whether the shortcut key has been used by another command.

## **Setting Preferences & Viewing Properties**

## **Setting Preferences**

Although Foxit PDF Reader is customizable, some of the customizable features may be difficult to find. After reading this section, you will find out how useful having your own preferences can be, and how simple it is to set up your own preferences.

To set preferences in Foxit PDF Reader, please choose **File** > **Preferences**. In the **Preferences** window, input keywords in the **Search** box to find a preference option. While navigating the categories, you can use the arrow keys or Tab key to switch between different preference settings.

#### 3D

Foxit PDF Reader lets you view, navigate, measure, and comment on 3D content in PDF documents. To do this, you need to enable the 3D content in PDF documents by selecting the **Enable the playing of 3D content** option. If Safe Reading Mode and Protected View are disabled, with the option unselected, a dialog box pops up to ask whether you trust the document to enable the playing of the 3D content in the document when you open a 3D PDF file for the first time.

**Note**: By default, Safe Reading Mode is enabled, and whether the option has been selected or not, when you open a PDF with 3D content for the first time, a dialog box pops up to ask whether you trust the document to enable/activate the 3D content in it, and you can select an option to trust the document one time only or always trust the document. Selecting **Trust this document always** in the dialog box also adds the document to the privileged locations, and the dialog box will not prompt next time you open the PDF. See also <u>Privileged Locations</u>. Note that the dialog box does not necessarily pop up when you open a 3D PDF. Sometimes it pops up only when you click on the 3D content in the PDF. When it pops up is determined by the activation settings of the 3D content. And the message displayed in the pop-up dialog box varies depending on your

trust settings for Foxit PDF Reader. See also **Security settings** and **Trust settings**.

#### Accessibility

#### Document Colors Options

- > Replace document colors: Check to activate other options to change the document colors.
  - A. Use Windows color scheme: Sets document colors according to the color scheme of your Windows preferences.
  - B. Use High-Contrast colors: Choose the high-contrast color combination for page background and document text to improve readability.
  - C. Custom color: Changes the color of Page Background and Document Text.
  - D. Only change the color of black text: Change only the black text and leave the colored text unchanged when you replace document colors.
  - E. Change the color of text or black line art: Change the color of text or black line arts when you replace document colors.

#### Override Page Display

- A. Always use Page Layout Style: Set a page layout as default for all PDF documents and override other page display settings.
- B. Always use Zoom Setting: Specify a default zoom setting for all PDF documents and override other page display settings.

#### Other Accessibility Options

- A. Use document structure for tab order when no explicit tab order is specified: Improve the navigation of form fields and links that don't specify a tab order.
- B. Always display the keyboard selection cursor: Specify whether to display the keyboard selection cursor or not when reading a document. Please check this option if you are using a screen magnifier.
- C. Always use the system selection color: Override the default selection color (blue) with a color that the system specified.
- D. Show Portfolios in Files mode: Display PDF Portfolio component files and file details in a list.

#### **AIP Settings**

Open Settings: Choose how to open the link within an AIP-protected PDF, in Foxit PDF Reader or in your browser.

## **Commenting**

#### Viewing Comments

- A. Font and Font Size: Specifies the default font and size for text in the comment popup notes. These settings are applicable when you specify them before using any comment tools, and will take effect after you restart Foxit PDF Reader. (*Tip: The font and font size defined in the comment format panel prevails over the preference settings.*)
- B. Pop-up opacity: Sets the opacity of pop-up notes for annotation commands.
- C. Print notes and pop-ups: Specify whether or not to print sticky notes and pop-up notes associated with comments in PDF as they appear on the page. Please note that if you want to print the pop-up notes associated with comments, you should open the pop-up notes that you want to print in the PDF file, and adjust their placement on the page before printing to ensure that they don't overlap or spill off the page. While printing, make sure that you select the **Document and markups** option in **Print What** group in the **Print** dialog box.
- D. Ensure that pop-ups are visible as the document is scrolled: Ensure that the popup boxes float along with the page as the document is scrolled. This option is checked by default.
- E. Hide the pop-up note icon: Specify whether to show the pop-up note icons for comments that include text messages in the pop-up notes. When this option is unchecked, you will see a small bubble around the comment if it includes text messages in the pop-up note.
- F. Automatically open pop-ups on mouse rollover: This option enables Foxit PDF Reader to automatically open the pop-up note when you move your mouse over comments of any type with the **Hand** command or **Select Annotation** command selected.

#### Making Comments

- A. Always use User Name of the log-in account for Author name: Use the user name of the log-in account as the author name while making comments. If a user does not set the user name for the Foxit log-in account, the prefix of the email address will be used as the author name instead.
- B. Copy selected text into Highlight, Squiggly Underline, Underline, and Strikeout comment pop-ups: Check this option to copy and paste the selected text to comment pop-up notes automatically when you highlight, squiggly underline, underline, or strikeout text in PDF documents.
- C. Automatically open comment pop-ups for comments other than notes: Check this option to automatically open the pop-up notes to input text messages when you add comments using the Text Markup tools, Drawing Markup tools (except Pencil), and Stamp tools.

D. Copy encircled text into Drawing comment pop-ups: Check this option to copy and paste the text circled using the Drawing Markup tools (except Pencil) to the pop-up notes automatically when you add drawing markups in PDF documents.

#### Pencil Settings:

- A. Enable to select pencil annotation when drawing: When the Pencil command is selected, the cursor changes into a pencil . If this option is selected, the pencil changes into an arrow when you put it over a pencil annotation, and you can click the annotation to select it. If the option is not selected, the pencil will not change into an arrow.
- B. Click to create annotations: If selected, you start to draw with the pencil when you click on the page, and in other words, only one click creates a pencil annotation; if not selected, you do not start to draw until you click and drag the pencil.
- C. Set Timeout: Specifies a period of time within which all of the drawings/plans completed is one pencil annotation, after which what you draw is another pencil annotation.

#### Floating Toolbar:

Show floating toolbar when comments are created or selected: Specify whether to show the floating toolbar that allows users to perform further operations (modify properties, open pop-up notes, etc.) after a comment is created or selected. This option is selected by default.

#### **Documents**

The Document of the Preferences dialog provides several ways to browse PDF documents.

#### Open Settings

- 1. Always open files in a new window: Creates a new Foxit PDF Reader window when double-clicked to open a PDF file.
- 2. Alert user when documents request Full Screen: A message box will pop up to confirm the operation when opening a PDF which has been defined to be opened in full screen mode.
- 3. In web browser, display PDF in Read Mode by default: Opens a PDF in Read Mode automatically in web browser.
- 4. Always use filename as document title: Check this option to display the filename of a PDF file in the file tab and the title bar of the application window. When this option is unchecked, if a PDF file has been set to display the document title in the

- initial view, the document title specified in the document properties will be displayed.
- 5. In Foxit PDF Reader, please choose the mode for Display PDF Mode: Display the PDFs in Read Mode or Full Screen Mode or normal way automatically when opening PDFs with Foxit PDF Reader.

#### Prompt Messages

- 1. Display a prompt before closing all tabs: When you close a window with multiple tabs, Foxit PDF Reader will ask you to confirm your choice. This prevents you from accidentally closing the whole window when you intend to close only the current tab.
- 2. Automatically save document as e-mail attachment: Automatically save the changes you made to a document and attach the modified document to your email system for sending.

#### PDF/A View mode

Sets to view documents in PDF/A view mode (i.e. read-only mode) to prevent modifications to the documents.

- 1. Never: Never open documents in PDF/A view mode.
- 2. Only for PDF/A documents: Switch to read-only mode automatically when a PDF/A document is opened.

#### Save Settings

- 1. Automatically save file every \_ minutes: Configure the time intervals for when the document will be automatically saved.
- 2. Save as optimizes for fast web view: Checking this option can enable Fast Web View when you save a PDF files as a copy, which will restructure a PDF file for page-at-a-time downloading from web servers for faster access.

#### Preferred Save As Location

If you have configured a preferred save as location, when prompted to specify a location to save a document, the configured location will be automatically chosen in the **Save As** dialog box.

- 1. Save to the last accessing location: Set the last accessed folder as the default save as location. This option is checked by default.
- 2. Save to a preferred location: Define a preferred location in your local disk as the default save as location. To add a preferred save as location, select this option, and click **Browse** to select the location (or input the location in the location field). If you need to remove the configured output location, just delete the directory path in

the location field.

#### **ECM Integration**

#### **SharePoint**

Choose the default way to open the document from SharePoint server.

- Open only: Open the document directly without checking out.
- Check out and Open: Check out and open the document so that other users cannot modify the document at the same time.
- Allow you to choose when opening the document: Let you choose the way to open
  the document from SharePoint server. If you check this option, a dialog box will pop
  up when you open the document. In the dialog box, you can choose to open or check
  out and open the document as desired.

#### **File Associations**

This option allows you to set the default PDF Viewer.

#### • Make Foxit PDF Reader the default PDF viewer:

#### Advanced

- 1. Include browser when setting default PDF viewer: check this option to set Foxit PDF Reader as the default PDF viewer in browser.
- 2. Include preview when setting default PDF viewer: check this option to set Foxit PDF Reader as the default PDF viewer in preview.
- 3. Include thumbnail when setting default PDF viewer: check this option to set Foxit PDF Reader as the default PDF viewer in thumbnail view.
- 4. Use Foxit PDF Reader to open embedded Acrobat files and embedded Foxit PDF Editor PDF files in Microsoft Office if Acrobat and Foxit PDF Editor are not installed: check this option to set Foxit PDF Reader as the default PDF viewer in Microsoft Office for opening embedded Acrobat files and Foxit PDF Editor PDF files.
- Make default PDF viewer: Makes Foxit PDF Reader as default PDF viewer. Foxit PDF Reader will be set as the default PDF viewer according to your setting in Advanced item. For example, if you check "Include browser when setting default PDF viewer" in Advanced item, and click Make default PDF viewer to activate the setting, then PDF files will be displayed by default with Foxit PDF Reader in your Windows system as well as your browser.
- **Restore file associations**: Restores settings in File Associations.

Always perform check when starting Foxit PDF Reader: If Foxit PDF Reader is not the default PDF viewer or previewer in your system, a message box will appear and provide the options for you to set it as your default viewer/previewer every time you run Foxit PDF Reader.

#### **Forms**

The form tab enables you to set the preferences of the interactive form display.

- Automatically calculate field values: Specify whether to automatically perform all field
  calculations right after users input the entries. This option is checked by default. The
  setting for the option only applies to your current session, and it will revert to the
  default setting after the application is restarted.
- Show focus rectangle: With the option selected, a dotted rectangle appears around a form field if the form field currently has the focus. The option is selected by default.
- Show text field overflow indicator: Select this option to show the plus (+) sign if the text in a text field exceeds the bound of the field.
- Always hide document message bar: You can decide whether to show or hide the notification message when opening an interactive PDF form.
- Highlight all fields: Checking this option allows you to highlight all form fields in the PDF document (Tip: The signature fields will no longer be highlighted after users apply signatures). You can click the color palette to change the highlight color for ordinary fields as well as required fields.
- Auto-Complete: Auto-Complete includes three options that allow you to turn on or off
  the auto-complete feature. When enabled, Foxit PDF Reader will store your entries
  and provide relevant suggestions as you fill in an interactive PDF form.
  - Off: Turn off the auto-complete feature. No suggestion will be provided when you fill in an interactive PDF form.
  - > Basic: Enable auto-complete feature, and provide relevant suggestions when you enter a character in the interactive form field.
  - Advanced: Enable auto-complete feature, and automatically display a list of suggestions when you tab into a form field.
  - Remember numerical data: This option is available when you choose **Basic** or **Advanced** in the **Auto-Complete** drop-down list. If it is enabled, Foxit PDF Reader will store numerical entries as well, otherwise, only text entries will be remembered.
  - > Edit Entry list: Remove the saved entries from the auto-complete memory.
- Email: You can edit the default subject and contents which will be sent with the PDF form.

#### **Full Screen**

#### • Full Screen Navigation

- A. Select to show Scroll bar, Status bar, Tab bar or Navigation Panels in Full Screen mode.
- B. Show Exit button Check or uncheck this option to show or hide Exit button in Full Screen mode.
- C. One page at a time Displays a single page at a time in Full Screen mode.
- D. Left click to go forward one page; right click to go back one page -- Lets you page through a PDF document by clicking the mouse. You can also page through a document by pressing Space, Shift + Space, or the arrow keys.
- E. Loop after last page Reverts to the first page after the last, allowing you to page through a PDF document continuously.
- F. Advance every \* seconds Select this option and type a number to specify the frequency to automatically advance from page to page in Full Screen mode. With this setting enabled, you can still page through a document manually using your mouse or keyboard shortcuts.

#### Full Screen Appearance

Background – Click the color pane and choose the color you like to be the background color in Full Screen mode.

#### Full Screen Transitions

Foxit PDF Reader supports page transition in Full Screen mode. There are 12 transition types: Replace, Split, Blinds, Box, Wipe, Dissolve, Glitter, Fly, Push, Cover, Uncover and

Fade. Also, you could set the direction for the transition.

- A. Ignore all transitions: Check to ignore page transition in Full Screen mode.
- B. Default transition –Choose page transition for one document in the drop-down window.
- C. Direction Set the direction for the transition.
- D. Navigation control direction: If selected, the direction of page transition will be based on your navigation direction in the document. For instance, if you turn to the next page, the page will transition from top to bottom; to the previous page, the page will transition from bottom to top. For some transitions without directions, the option is not available.

#### General

The General Preferences provide options on Basic Tools, Tab Bar, Status Bar, Notification Messages, Application Startup settings, etc.

#### Basic Tools

- A. Use single-key accelerators to access tools: Enable single-key accelerators to select some commands and perform some actions with single-key shortcuts. Please refer to <a href="Single-Key Accelerators">Single-Key Accelerators</a> for more details.
- B. Use fixed resolution for snapshots Sets the resolution used to copy the image captured with the Snapshot command. Automatically uses 72 pixels as default resolution.
- C. Create links from URLs Detects the text links in PDF documents and change the non-clickable links into clickable ones.
- D. Minimize to system tray You can save space on your task bar by minimizing the Foxit PDF Reader to system tray. Check it to minimize Foxit PDF Reader to system tray when you click the Minimize button.
- E. Screen word-capturing Check it to turn on this function that enables you to use your mouse to capture words inside a PDF file and have it translated if you are using dictionary software.
- F. Make Hand Tool select text Check it to enable hand command to become text selection command when moving it to the selectable content.
- G. Make Hand Tool read articles Check it to enable the navigation of an article with the help of the pointer. After you start the article viewing mode, with the Hand tool selected, the pointer will automatically change to a Hand tool with an arrow in it when hovering over an article thread. Then the clicks with the pointer will follow the article thread, making the article navigation effective. See also Navigating with Article Thread. The option is checked by default.
- H. Make Hand Tool use mouse-wheel zooming: Select this option to zoom through documents while scrolling using the mouse wheel. This option is useful for users to browse large drawings.
- I. Enable middle mouse button to auto scroll This option is checked by default, which allows you to activate the auto-scroll feature by pressing the middle mouse button. If you have assigned the middle mouse button for other functions, uncheck this option to disable the feature.

#### Tab Bar

- A. Max tab size Allows you to specify a maximum tab size.
- B. Double-click to close a tab: Checking this option allows you to close tabs by double-clicking.
- C. Use recent order when switching tabs with Ctrl + Tab: In multi-tab reading, use **Ctrl** + **Tab** to switch through open tabs in recent order you viewed them. With the option unselected, using **Ctrl** + **Tab** to switch the tabs in the order they appear in the application window.
- D. Quickly switch between tabs by using mouse wheel: In multi-tab reading, switch through open tabs by scrolling the mouse in the tab bar. Scroll up to the previous

tab, and down to the next tab.

#### Status Bar

- A. Auto-hide status bar Hides the status bar when opening a PDF, and enables it to float at the bottom of the page only when the cursor is moved to the bottom.
- B. Show scroll lock button: Enable scroll lock and display the scroll lock icons in the status bar.

#### Notification Messages

Notification messages appear at the top right corner of the document pane when you work with interactive PDF forms, PDF/A files, or PDF files under shared review or email review, etc. You can configure the notification message settings as required:

- A. Show the message which affects the next step: Specify whether or not to show the procedure-related notification messages which usually contain action buttons for you to move forward to the next step. This option is checked by default. And it is recommended to keep the option checked so that you can work on documents during Shared Review or Email Review normally.
- B. Show the notification related message: Specify whether or not to show the notification related messages which inform you that a PDF file contains such elements as interactive form fields, 3D contents, etc.
- C. Show PDF/A message again: Specify whether or not to show the message when opening a PDF/A document.

Tip: You can also change the notification message settings by clicking the gear icon on the message shown on the document pane. The changes of settings you made in the notification message will be applied accordingly in the Notification Message preferences.

#### User Experience Improvement

Turn on or off data collection. The collected data will be used to improve the user experience only.

#### • Features which Required Internet Connection:

Specify whether to disable all features that require an Internet connection. The setting will take effect after you restart the application.

#### **Application Startup**

- A. Show Start page: Check it to show the start page when running Foxit PDF Reader.
- B. Show Advertisement: Check it to show advertisement on the start page.

- C. Show floating promotion page: Check it to show the floating promotion page if the program becomes idle. Only applicable during a free trial.
- D. Launch in debug mode: This option is unchecked by default. Checking this option will enable Foxit PDF Reader to be launched in debug mode and log file will be generated during your operation. Log file will be saved in "%userprofile%\AppData\Local\Foxit PDF Reader\glog". When you encounter issues while using Foxit PDF Reader, you can send the log file to Foxit and the log file will be used for checking and solving your issues only.
- E. Automatically restart the application with all tabs restored: Specify whether to restart the application automatically with all tabs restored on the next startup of your system if the application has been closed unexpectedly in the last session. This option is checked by default.
- F. Disable Al Assistant: The Al Assistant within Foxit PDF Reader offers the Al-driven features that help increase productivity and streamline document processing. You can easily toggle the Al Assistant feature on or off by deselecting or selecting the **Disable Al Assistant** option.
- G. Disable Support Center: The Support Center within Foxit PDF Reader functions as an Al-powered support tool and can provide answers to user queries and offer instructions on various application features based on Foxit resources, such as Foxit Knowledge Base. To deactivate this tool, select the **Disable Support Center** option.

#### History

#### History

- A. Restore last session when application starts: Determines whether documents start automatically with the last viewed session when you launch Foxit PDF Reader. If this option is selected, Foxit PDF Reader will automatically record the opened document and its viewing information (including page number, zoom ratio, etc.) every three minutes or at the time when you close the application, and display the last viewed session recorded when you launch Foxit PDF Reader next time (even when you relaunch Foxit PDF Reader after an unexpected quit).
- B. Restore last view settings when reopening: Determines whether documents open automatically with the last viewed settings.
- C. Maximum number of documents in history list: Sets the maximum number of PDF documents you read in history list. The default is 50 PDF documents.
- D. Maximum number of documents in Recent Documents list: Sets the maximum number of PDF documents you have viewed recently in the File page. The default setting is 10 PDF documents.
- E. Show this number of unpinned Recent Folders: Set the number of unpinned recent folders listed in **File** > **Open** > **Computer** or cloud services that you have signed in (e.g. **SharePoint/Google Drive/Dropbox**). The default setting is 10 folders.

Note: Foxit PDF Reader allows users to set "maximum number of documents in history list", "maximum number of documents in Recent Documents list", and the "number of unpinned Recent Folders" to 0.

#### Identity

Shows the identity of your application, including Login Name, First/Last Name, Title, Organization Name, Organization Unit, and Email Address. The identify information is quite useful in PDF reviews. It will help other review participants recognize your comments easily. The Login Name is set by default (using the username of the current operation system) and cannot be changed. Except for Login Name, you can change or complete your identity information in Identify Preferences.

#### Index

Enable embedded index: Select this option to enable the search with the embedded index in the document.

#### **JavaScript**

#### Enable JavaScript Actions:

See also Run Script Right Control.

#### Use external JavaScript editor

By default, you can use the built-in JavaScript editor in Foxit PDF Reader to edit JavaScript code in Actions. Foxit PDF Reader supports calling an external JavaScript editor for coding including WebStorm, Sublime Text, and more.

To use an external JavaScript editor, select this option to add a JavaScript editor as the default JavaScript editor in Foxit PDF Reader. Note that when editing JavaScript code in an external editor, Foxit PDF Reader is inaccessible.

#### Languages

Change the application language and default reading direction.

#### Languages

Foxit PDF Reader provides the commonly used languages to meet customers' needs to the upmost. Usually, Foxit PDF Reader will automatically choose the language applied to your OS as its default during your installation. But changing languages after installation is supportable. To change the UI language of Foxit PDF Reader, please go to **File** > **Preferences** > **Languages**, and select an option from the following:

- Use system locale language—Makes the system locale language the UI language.
- Choose custom language—Selects your desired UI language from the list. (Tip: Foxit PDF Reader has been localized in German, Spanish, French, Italian, Dutch, Polish, Portuguese, Russian, Danish, Finnish, Norwegian, and Swedish. You can <u>click here</u> to download the official multilingual version from Foxit website.)
- Choose languages provided by the community—Selects the language translated by volunteers on <u>Foxit multi-language translation system</u>. A prompt message will pop up giving you a notice that you can get the UI language package on our website. In addition, you can also help us to do some translation so that we can localize Foxit PDF Reader into your own language. To visit our multi-language translation system, please <u>click here</u>.

#### Default Reading Direction

Choose a default reading direction when you're reading a document in **Facing** or **Continuous Facing** mode. With **Left to Right** or **Right to Left** selected in **Default Reading Direction**, the reading direction is based on the setting here in Preferences; with **Infer direction from document** selected, then the binding direction in **File > Properties > Advanced** prevails.

#### Editing Text

**Enable text direction switching**: Check this option to display the **Writing Direction** button in the **Format** panel, which allows you to change the text direction while adding text comments.

**Text Direction**: Sets the text direction for text comments, including left to right and right to left.

#### Hindi Digits

Select this option to allow you to input numbers in Hindi.

#### Measuring

#### Measurement Units

Sets unit of page dimensions given in the status bar and print dialog. The unit can also be

applied as the default setting for measurement if you specify it before using the measure commands. (*Tip*: The unit defined in the measurement format panel prevails over the preference settings. If you do not set the measurement unit before using the measure commands or change the unit in the *Format* panel during the measurement, the unit specified in the measurement format panel will be used as default instead.)

#### Measurement Label

Choose to use the default measurement label or specify your own label.

#### Measurement Markup

**Use Default Leader for Distance Measurement:** Specify whether to show the line leader on both sides of the measurement points or not while measuring the distance.

#### • Use Scale and Units From Document (When present)

Select the option to use the scale and units embedded in the document, if any. Deselect the option to specify the scale and units manually. The option is unselected by default.

#### Multimedia (legacy)

Do not use QuickTime Player for multimedia items: This option is checked by default. As Apple does not provide security updates for its legacy QuickTime for Windows software any more, it is recommended to keep this option checked for security purpose. When checked, Foxit PDF Reader will invoke a multimedia player other than QuickTime Player in your Windows system to run the multimedia inserted in PDF files, but will not play the video if it has been specified to use QuickTime as the required player.

#### **Page Display**

The Page Display panel of the Preferences dialog box includes the following options:

- Default Layout and Zoom
  - A. Navigation tab: specifies the panel to be displayed in the opening view.
    - a) Use Initial View: minimizes the Navigation panel and hides all panels.
    - b) Page Only: displays Pages panel by default in opening view.
    - c) Bookmarks Panel and Page: displays Bookmarks panel by default in opening view.
    - d) Pages Panel and Page: displays Pages panel by default in opening view.
    - e) Attachments Panel and Page: displays Attachments panel by default in opening view.

- f) Layers Panel and Page: displays Layers panel by default in opening view.
- B. Default page layout: You can view PDFs in following layouts:
  - a) Automatic: With this option selected, in multi-page document, displays pages in Continuous mode, or in Single mode if the page width is larger than the page height. If you change the page display in the View tab, the document will display in the page layout the last time you set.
  - b) Single Page -- Displays one page at a time, with no portion on other pages visible.
  - c) Continuous -- Displays pages in a continuous vertical column that is one page wide.
  - d) Facing -- Displays each two-page spread with no portion of other pages visible.
  - e) Continuous Facing -- Displays facing pages side by side in a continuous vertical column.

### See also "Changing the Page layout".

- C. Zoom: Sets the magnification level for PDF documents when they are first opened. This value overrides document settings. The default uses the settings of the PDF document.
- D. Custom facing: The Default Facing for page layout is 2 pages. You can check the Custom Facing box and set the facing layout to your own preference.
- E. Custom margin: Sets the margins between different pages with Facing or Continuous Facing page layout. The default is a margin of 8 pixels.

#### Rendering

- A. Smooth text: Optimally adjusts text display that best suits your monitor.
- B. Smooth line art: Removes the abrupt angles in lines to make them smoother.
- C. Enhance thin lines: Enhances the display of thin lines to make them more visible. This option is selected by default.

### Page Content

- A. Display transparency grid: Displays a grid behind transparent objects.
- B. Use logical page numbers: Open PDFs with the logical page numbers. This option is selected by default. It is used to match the position (or the physical page number) of the page in the PDF to the printed page number of the document. For instance, for a document with 100 pages, when you turn to the second page, the page number displayed in the status bar will be 2/100 (the physical page number) theoretically. However, if the PDF contains four-page front matter (such as the cover page and the copyright page) which is numbered in lowercase Roman numbers (i-iv) while the main content is numbered in Arabic numbers starting from 1 (1-96). Foxit PDF Reader will display the logical page number, followed by the physical page number in parentheses, i.e. 2(6/100) when you turn to the sixth page of the PDF. With this option unselected, only the physical page number is displayed

in the status bar, i.e. 6/100 for the sixth page.

C. Forbid the change of the current Zoom factor during execution of 'Go to Destination' actions (these actions can be launched from bookmarks): Check to forbid user to change the current Zoom factor during execution of 'Go to Destination'.

See also "Changing the Magnification Level of a Document".

# **PDF Sign**

Ink Sign

Flatten the document when applying all signatures: Flattening the document when applying all signatures will make all the signatures, forms, and annotations become one whole object of the PDF page.

### **Print**

Printer

Print text as graphics (ignore font substitution) – Sets the text font as graphics and printout fonts are exactly the same as the text fonts. Automatically allows quick print where Printer Font is substituted.

Use GDI + Output for all types of printer: Specify whether to use GDI + output or not for PS driver printers (excluding PCL driver printer) during printing.

- Batch Print
  - A. Show print settings before printing document: Check it to show the Print dialog box before printing a document.
  - B. Require confirmation when printing multiple documents: Check it to show the confirmation message before starting batch printing.
- Prompt Foxit PDF Reader when printing in silent print mode

Specify whether to close Foxit PDF Reader instance or not when finishing silent printing using the command line.

### Reading

Page vs Document

This preference determines how much of a document is delivered to a screen reader at a time. If a PDF isn't tagged, Foxit PDF Reader may analyze the document and attempt to infer its structure, which can take a long time for a long document. You may want to set Foxit PDF Reader to deliver only the currently visible page so that it analyzes only a small piece of the document at a time. This consideration will vary depending on the size and complexity of the document and on the features of the screen reader.

- A. Only read the currently visible pages This option is usually best when using a screen magnifier. It improves performance by eliminating the need for the software to process parts of the document that aren't visible. When Foxit PDF Reader sends only the currently visible pages of a PDF to the memory buffer, the assistive technology has access to those pages only. It cannot go to another page until the next page is visible and Foxit PDF Reader has sent the page information to the memory buffer. Therefore, if this option is selected, you must use the navigation features of Foxit PDF Reader, not those of the assistive technology, to navigate from page to page in the document. You should also set the Default Page Display option in preferences to Single Page if you choose to have Foxit PDF Reader send only the currently visible pages to the assistive technology.
- B. Read the entire document This option can be best if you use a screen reader that has its own navigation and search tools and that is more familiar to you than the tools in Foxit PDF Reader.
- C. For large documents, only read the currently visible pages This option is selected by default and is usually best if you use a screen reader with long or complex PDFs. It allows Foxit PDF Reader to deliver an entire small document but revert to page-by-page delivery for large documents.

#### Minimum number of pages in a large document

When the "For large documents, only read the currently visible pages" option is selected, it allows you to set this minimum value.

- **Enable assistive technology support**: Check this option to allow assistive technology products, such as screen readers, to provide information about the UI and document to end users.
- Confirm before preparing untagged PDF for reading with assistive technology: Select the option, and if any assistive technology detected in your system, a dialog box pops up when you opens an untagged PDF to ask you whether to set the reading order options for the PDF for reading with assistive technology.

### Reading Order

Set reading order as appropriate for your assistive software and devices.

- A. Infer reading order from document (recommended): Interpret the reading order of untagged documents by using an advanced method of structure-inference layout analysis.
- B. Left-to-right, top-to-bottom reading order: Deliver the text according to its placement on the page, reading from left to right and then top to bottom. This method is faster than "Infer reading order from document". This method analyzes text only; form fields are ignored and tables aren't recognized as such.
- C. Use reading order in raw print stream: Deliver text in the order in which it was recorded in the print stream (i.e., the text object order stored in the content stream). This method is faster than "Infer reading order from document". This method analyzes text only; form fields are ignored and tables aren't recognized as such.
- Override the reading order in tagged documents: Use the reading order specified
  in the Reading preferences instead of what the tag structure of the document
  specifies. Use this preference only when you encounter problems in poorly tagged
  PDFs.

# Reviewing

#### Automatically check for new comments:

Set the time interval to automatically check for new comments during shared review. By default, Foxit PDF Reader will check for new comments every five minutes during shared review.

### Shared Review Options

- A. Show welcome dialog when opening file: Check it to show the welcome dialog when opening a shared review. In the welcome dialog, you can view the general information for the shared review, including the initiator, deadline, review server and so on.
- B. Show server connection warning when opening file: Check it to show the server connection warning when opening a shared review.
- C. Remind before review expiration: If you check this option, a prompt message will pop up before the shared review expires.

### Review Options

A. Show prompt messages for Shared Review: Determines whether to show prompt message for Shared Review when publishing comments in a shared review that contains several comments from other reviewers that have not yet been published to

the command server. You can take ownership of these comments and publish them on behalf of the reviewers.

B. Show prompt messages for Email Review: Check this option to show prompt messages during email review.

### Send Messages

- A. Use Auto-Complete List to suggest names when typing in the "To" and "Cc" fields: Checking this option will enable Auto-Complete feature, which recognizes and suggests contacts based on the previously entered email addresses when you send back your comments during a shared review by email.
- B. Empty auto-complete list: Click this option to remove all the email address entries from the Auto-Complete memory.

### Search

- Ignore Asian character width: Check this option to ignore Asian character width during the search, and find both half-width and full-width instances of the Asian language characters.
- Ignore Diacritics and Accents: Check this option to ignore diacritics and accents during the search, and find instances with any variation of the alphabetical characters. For example, when this option is enabled, if you type "resume", Foxit PDF Reader will find both "resume" and "resume".
- Always show more options in advanced search: Check this option to show additional search options in the Search panel, in addition to the basic options. If this option is not checked, some of the search options will be collapsed and hidden from view in the Search panel, and you will need to click **More** to expand and show all the options.
- Show document title in search results: Check this option to display document titles in search results. However, if a document does not contain a title, its file path will be displayed in search results. If this option is unchecked, Foxit PDF Reader will display file paths in search results.
- Maximum number of documents returned in Results: Specify the number of documents to be displayed in the search results. You can input any integer between 1 and 10,000.
- Range of words for Proximity searches: Specify the number of words between which the search terms occur from each other when executing proximity searches. It is set as 900 by default, and you can input any integer between 1 and 10,000.

- Fast Find: Enable fast find to make future searches faster by storing information about your frequently used PDF files.
  - Maximum Cache Size: Specify the maximum cache of search information for the Fast Find. The default value is 100 MB. You can input any integer between 5 and 100,000.
  - Purge Cache Contents: Delete all the caches of search information.

For more information about fast find, please refer to "Fast Find".

### Security

Protected View

To protect your computer from files originated from the Internet or other potentially unsafe locations, turn on **Protected View** to open these files to reduce risks. In Protected View, files are read only and most editing actions are not allowed.

Privileged Locations

Specify privileged locations for trusted content to exempt viewers from security restrictions in Safe Reading Mode. You can refer to "Bypass Security Restrictions in Safe Reading Mode" for more details.

# Signature

- Default Signing Format: Choose a default signing format based on PKCS#7 or CAdES standard. PKCS #7 - Detached is selected by default.
- Appearance Styles: Manage the signature appearance templates.
- Signing & Verifications
  - A. Sign the document immediately after the signature is placed: Check this option to sign the document immediately when you place the signature on the document. When it is unchecked, you will need to click Sign Document to apply the signature after placing it on the document. You can still modify the document before applying the signature.
  - B. Control how and when signatures are verified: click **Change Settings** to choose options.
    - Verify signatures when the document is opened: If this option is checked,
       Foxit PDF Reader will verify the signatures when the document is opened, and
       will display the signature verification results in the Digital Signatures panel.
    - When document has valid but untrusted signatures, prompt to review and

trust signers: With the option selected, if the signature (not including certified signatures) is verified as valid but is applied by an untrusted signer with a certificate that doesn't chain up to a trust anchor, a message box appears in the top-right corner of the application window to inform you the document includes signatures from signers that you haven't trusted yet. You can click **Manage Trust** in the message box to trust the signer. More information, please refer to <u>Trusted Certificates</u>. To make sure that the notification message is displayed successfully, please check the **Show the message which affects the next step** option in the <u>preferences about **Notification Messages**</u>.

#### Verification Behavior

- Require certificate revocation checking to succeed whenever possible during signature verification: Specify whether or not to check the revocation status of certificates while verifying signatures.
- Use expired timestamps: Uses the secure time provided by the document timestamp or the timestamp embedded in the signature, even if the timestamp's certificate has expired. The option is selected by default. With the option unselected, the time provided by the expired timestamps will be discarded and the verification time will be the time at which signature was applied or the current time in the system based on your setting on Verification Time.
- o Ignore document validation information: Specify whether to ignore the related certificate revocation information embedded in the document when validating signatures.

#### Verification Time

Verify Signature Using: You can check the digital signature for validity based on the time when the signature was created, the time provided by the timestamp embedded in the signature, or the current time in your system.

 Verification Information: Select an option to specify whether to add verification information to the signed PDF. Ask when verification information is too big is selected by default.

### Windows Integration

Specify whether to trust all root certificates in the Windows Certificate Store when validating signatures and certified documents. Checking these options may compromise security. Please make sure that you trust all the root certificates before enabling these features.

• Save signed file as a copy named 'filename\_signed.pdf': Check this option to save the signed file as a copy named 'filename\_signed.pdf' after applying the digital signature.

When you sign multiple PDF files, you can also specify the file name in <u>Output Options</u>. The file name you specified in Output Options during signing will take precedence over the settings in Signature preferences.

#### PKCS#11 Modules and Tokens

If you use PKCS#11 devices such as smart card readers or tokens to sign documents, set up the PKCS#11 modules before signing documents.

- 1) Click **Module Settings.** In the pop-up PKCS#11 Modules and Tokens dialog box, click **Attach Module**.
- 2) Browse to the location of the PKCS#11 module (.dll file) on your computer, select it, and click **Open**.
- 3) The module should now appear in the list of available modules in the dialog box. You may need to enter a PIN or password to access the module, depending on the security settings of the module.
- 4) Once the module is loaded, you should be able to use it to sign documents in Foxit PDF Reader.

**Note**: The specific steps may vary depending on the PKCS#11 module being used. It's always a good idea to consult the documentation for the module for specific instructions.

# Speech

- Volume: Sets the reading volume of Read out Loud.
- Use default voice: Check it to read content with default language, or you can select the required one from the combo box.
- Use default speech attribute: Check it to read with default pitch and rate, or you can uncheck it and then set pitch and rate in the combo box as needed.
- Read comments: Check it to enable the application to read out the comments when executing Read out Loud.
- Read form fields: Check it to enable the application to read out the form fields when executing Read out Loud. Please refer to Read PDF Form Fields Out Loud for details.

### Spelling

- Enable check spelling: Check **Enable check spelling** to avoid spelling error.
- Dictionaries for Spell Check: Add, remove, or reorder the dictionaries for spell check.

### **Tablet**

Enable pressure sensitive: Enable pressure sensitive so that you can add free-form

annotations with PSI in PDFs by supported touchscreen devices.

# **Time Stamp Servers**

Configure the default Time Stamp Server to embed a trusted time stamp while signing.

# **Trust Manager**

Please refer to "Managing Security".

# **Updater**

- Automatically install updates: Foxit PDF Reader regularly checks for updates and downloads them automatically when there are available updates. Next time you launch the application, the updates will be installed automatically.
- Automatically download updates, but let me choose when to install them (recommended): Foxit PDF Reader will automatically download and display a message informing you of the upgrade and allow you to choose to upgrade to the new version. This option is checked by default.
- Do not download or install updates automatically: Never download or install updates automatically.

# **Viewing Properties**

The Properties window provides information about the document, including the document's location, title, subject, author, fonts used, and security settings. This window also displays attributes set by other programs.

To view the PDF properties, please choose **File** > **Properties**. You can acquire all relevant information as follows:

# **Description**

This tab shows some basic information about the document. The title, author, subject, and keywords may have been set by the person who created the document in the source application.

#### General

> File—The location of the document.

- > Fast Web View Show whether the PDF file is enabled for Fast Web View.
- PDF Version—The standard version of the document.
- > PDF Size—The size of the document.
- > Pages—Total number of pages of the document.
- > Title A general or descriptive heading of the document.
- > Subject— The principal idea and point of the document.
- Author— The writer of the document.
- Creator— The application that produced the original document.
- Producer—The application or driver that converted the original document into a PDF document.
- Keywords—The words that are used to reveal the internal structure of an author's reasoning.

#### Custom

View the custom properties of the PDF file, which may include metadata, company information, and other document properties.

#### Related Dates

- > Last Modified -- The date and time the document was last modified.
- > Created -- The date and time the document was created.

### • Show More Description

This option will show you more details about the document properties, which includes general information, security, and the backup files from the Windows backups.

### Security

The Security tab describes what changes and functionality are allowed within the PDF. If a password, certificate, or security policy has been applied to the document, the method is listed here. Changing security setting is not allowed in Foxit PDF Reader.

#### **Fonts**

The Fonts tab lists the fonts and the font types used in the original document, as well as the encoding used to display the original fonts.

### **Advanced**

The **Print Dialog Presets** group lists the Print Dialog Presets for the document, which will be applied automatically when you <u>print the PDF file</u> with Foxit PDF Reader.

The **Reading Options** group allows you to specify the reading direction and language for the document. These enable screen readers or other assistive technology to read the document using the appropriate language in the proper direction.

Tip: The binding direction setting for the document specified in **Advanced** tab will prevail over the reading direction setting in the application's preferences.

# **Chapter 3 – Viewing PDFs**

Once the Foxit PDF Reader is properly installed, you can open and view PDF files easily. When you have a PDF open, you can also adjust the view of the document, find text in it, and email to others.

# **Opening Documents**

You can open and view PDFs in Foxit PDF Reader from the desktop, or in a web browser.

# **Opening a PDF document in Foxit PDF Reader**

### **About the Start Page**

When you open Foxit PDF Reader, a Start Page will be opened by default, which introduces some product information of Foxit.

If you do not want to show the start page, please go to File > Preferences > General > Application Startup > uncheck Show Start page.

### Opening a PDF Document in Foxit PDF Reader

Do one of the following:

- Drag and drop the PDF file into the Foxit PDF Reader window.
- Click the **Open** button on the Quick Access toolbar. In the **Open** dialog box, select the file name, and click **Open**. PDF documents are usually identified with a .pdf extension.
- Click File > Open. To open a recent document or a document stored in the local drive, click Recent Documents/Computer. To open PDFs in SharePoint, Epona DMSforLegal, Alfresco, OneDrive Personal, OneDrive for Business (only available in the activated Foxit PDF Reader MSI Package), Google Drive, Dropbox, or Box, select Add a place, sign into your account, and you can then open your PDF files. The connected Cloud account will be listed in the File > Open and the PDF file will be in the Recent Documents list, which will help you open files quickly in the future. To

remove an account, just click the **Delete** icon that appears when you place your cursor over the account name.

### Note:

1. You can open more than one PDF document within the same Foxit PDF Reader application.

alternatively.

When you open more than one file at a time, you can navigate the PDF files easily by clicking the corresponding tabs. If you only open one PDF, the tab will not be shown. While reading PDF documents, you can right-click the corresponding tab and choose **Open Containing Folder** or **Copy Path to Clipboard** to open, copy and share the directory where the current PDF document is saved.

- 2. In **Recent Documents** tab, **Computer** tab, or cloud service tab (like Google Drive tab), you can right-click any file or folder, and then choose the corresponding option from the context menu to open the file/folder, pin the file/folder to list, remove the file/folder from the list, or copy the path of the file/folder to clipboard. To pin or unpin a file or folder, you can also hover the cursor over a file or folder and click the **Pin** icon unpin icon
- 3. To customize the number of documents or folders in the recently used list, please navigate to **File > Preferences > History.**
- 4. When adding a Google Drive or Dropbox account, you will be guided to sign in to the service in your system default browser. Please follow the on-screen instructions to sign in and authorize the access in your browser first, and then you can open and work with PDF files in Google Drive or Dropbox from within the application.

# Opening a PDF Document from Desktop or within Other Applications

If you set Foxit PDF Reader as your default viewer for PDF files, you are able to launch and open PDF files in the following applications:

- Email Application: In most email applications, you can double-click the attachment icon to open the document.
- Web Application: You can open a PDF document by clicking on the PDF file link in your web browser. For security purposes, if you try to open an AIP-protected PDF file in your web browser, the file will be opened in the stand-alone Foxit PDF Reader (desktop application) outside the browser.
- File System: Double-click the PDF file icon in your file system.

**Note:** You can see the size of the opened document at the bottom right corner of the window.

For example . To set the unit of page dimensions, please refer to "Measurement Units".

### **Opening a Secured PDF Document**

If you receive a PDF that is protected by security features, you may need a password to open the document. Some protected documents have other restrictions that prevent you from printing, editing, or copying.

- When opening a protected PDF, you will be prompted to enter the password. Foxit PDF Reader allows you to input Unicode password in the password input box when you open a document protected by Unicode password.
- When trying to copy or edit a secured PDF, you will find that the related functions or commands are disabled and grayed out.

### Opening a PDF/A-, PDF/E-, PDF/X-, or PDF/UA-Compliant File

When you open a file that conforms to PDF/A, PDF/E, PDF/X, or PDF/UA standard, Standards panel will be available in the navigation panel for you to check the conformance and output intent information. You can choose **View** > **View Setting** > **Navigation Panels** >

**Standards** or click in the navigation panel to open the Standards panel. In the Standards panel, you will find the following information:

- Conformance: Indicate the standard that is used to create the file, the ISO name, verification status, and trapped state.
- OutputIntent: Indicate the color settings associated with the file.

For PDF/A files, Foxit PDF Reader adds a PDF/A identification system, and supports to disable editing such files.

- When opening a PDF/A file, Foxit PDF Reader will switch to PDF/A view mode by default, with a message showing PDF/A file notification. Under such mode, you can only read the file, and modification is not allowed.
- You may need to edit a PDF/A file for any reason. To enable editing PDF/A files, please do one of the following:
  - Click the **Enable Editing** button on the notification message, and then click **Yes** to confirm your operation in the prompt message popping up afterwards.
  - (Alternatively) Choose File > Preferences > Documents, under PDF/A View mode, choose Never from the drop-down list, click OK and restart Foxit PDF Reader.

### **Retrieving Recently Opened Documents from within Foxit PDF Reader**

In **File** page, you will be able to instantly retrieve recently opened documents. Foxit PDF Reader provides a list of recently opened PDF documents. Just choose **File** > **Open** > **Recent Documents**, and you can see the recently opened documents in Recent Documents list. In the Recent Documents list, you can right-click any file and choose corresponding option from the context menu to open the selected file, pin the file to Recent Documents list, remove the file from the Recent Document list, or copy the file path to clipboard.

**Note:** To customize the number of document in recently used list, please refer to "Maximum number of documents in recently used list".

# **Saving Documents**

Foxit PDF Reader provides you with the power to do more when saving PDF documents. You can save a PDF document without additional usage rights in many different ways. If the file permissions allow, you can also save comments, form fields that you have added to a document, as well as save PDF contents in text format.

### Saving a Copy of a PDF

- Choose **File** > **Save As** > **Computer**.
- Choose a folder (current folder or recent folder) or click **Browse** to select desired location.
- In the **Save As** dialog box, enter the filename and click **Save**.

### Saving a PDF as a Text File

- Choose File > Save As > Computer.
- Choose a folder (current folder or recent folder) or click **Browse** to select a desired location.
- Choose TXT Files (\*.txt) from the Save as type field in the **Save As** dialog box.
- Click **Setting** to choose the content range:
  - A. All Pages save the whole document as a text file.
  - B. Current page only save the current page you are reading as a text file.
  - C. From Page enables you to select pages as a text file.
- Enter the filename and click Save.

### **Save PDFs in ECM Servers or Cloud Services**

Choose **File** > **Save As** > **Add a place** > the ECM server or cloud service, then sign in your account and choose a folder to save to. The account will be listed in the Save-as history for

your convenience. Click the **Delete** icon near the account name to remove the account from the list.

#### **Revert to the Last Saved Version**

Choose **File** > **Revert** to discard a series of unsaved changes and revert your PDF file to the last saved version.

# **Closing Documents**

To close a PDF document, please do one of the following:

- Choose **File** > **Close**.
- Press shortcut key Ctrl + W.

# **Exiting Foxit PDF Reader**

To exit Foxit PDF Reader, please do one of the following:

- ullet Click the big Close button imes on Foxit PDF Reader application window.
- Press shortcut key Ctrl + Q.

# **Viewing Documents**

# **Multi-tab Reading & Single Document Reading**

Foxit PDF Reader provides two different ways for you to read PDF files: multi-tab reading and single document reading.

# **Multi-Tab Browsing**

The multi-tab browsing feature enables you to open multiple files in a single application window. Newly opened PDFs will be displayed in tabs by default.

In multi-tab reading mode, you can drag and drop a file tab outside of the existing window to create a new window and view the PDF file in that individual window. To recombine the file tab to the main interface, click on the file tab and then drag and drop it in reverse to the main interface.

To switch between open tabs in multi-tab reading, do one of the following:

- Switch between open tabs in the most recently viewed order by using **Ctrl + Tab**. Before this, make sure you have selected the option **Use recent order when switching tabs with Ctrl + Tab** in **File > Preferences > General**.
- Scroll the mouse in the tab bar up to the previous tab and down to the next tab. Before
  this, make sure you have selected the option Quickly switch between tabs by using
  mouse wheel in File > Preferences > General.

By default, use Ctrl + Shift + Page Up to switch to the previous tab and Ctrl + Shift +
Page Down to the next tab. You can also change the shortcut keys. See also
Customizing Shortcut Keys.

### **Opening a New Tab**

To open a new tab, you can double-click a PDF file, select **File > Open**, or click the **Open** button on the toolbar.

### Closing a tab

Do one of the following:

- Click the Close button  $\times$  of a file tab on Tab Bar.
- Double click a file tab on Tab Bar if you have checked "Double-click to close a tab" in File > Preferences > General > Tab Bar.
- Click the middle button of the mouse on a file tab on Tab Bar.
- Right-click on a file tab and choose Close Tab /Close Others/Close Left/Close Right.
- Select File > Close.

To close all file tabs at the same time, click the Close button  $\times$  at the top right corner of the Foxit PDF Reader window, or right-click on a file tab and choose **Close all tabs in all groups**.

### **Single Document Reading**

The single document interface mode enables you to open multiple windows of Foxit PDF Reader. Foxit PDF Reader will create a new window when you double-click to open a new PDF file, which is very useful for viewing different files side by side.

- To enable single document interface mode, please go to File > Preferences >
   Documents > Open Settings > check Always open files in a new window option.
- To disable single document interface mode, please go to File > Preferences >
   Documents > Open Settings > uncheck Always open files in a new window option.

# **Read Multiple PDF Files in the Parallel View**

The parallel view allows you to read two or more PDF files side-by-side (either horizontally or vertically) in the same window. When reading PDF files in the parallel view, you can view, annotate, or modify each PDF file independently. However, the Read Mode and Full Screen

Mode operations are simultaneously applied to PDF files that are currently active in all tab groups.

To create the parallel view, do the following:

- Open two or more documents that you want to view in Foxit PDF Reader.
- Right-click on the file tab of the PDF document that you want to move to a new tab group, and choose one of the following options as needed:
  - > **New Horizontal Tab Group**: Display the PDF document in a horizontally parallel view.
  - > **New Vertical Tab Group**: Display the PDF document in a vertically parallel view.
- The PDF document will be displayed in a new tab on a split-screen within the same application window. If necessary, you can click and drag the dividing line between the parallel view to resize the portion of the split-screen.
- While navigating PDFs in the parallel view, you can scroll the mouse or use the shortcut key to switch between file tabs within the same tab group. See also "Switch Tabs in Multi-tab Reading".

Tip: If you are in the parallel view, when a new PDF file is opened, it will be placed in the last active tab group.

To move tabs in the parallel view, do one of the following:

- Directly drag and drop the file tab to the tab group that you want the PDF document to be moved into.
- Right-click the file tab, and choose Move to Next Tab Group to move the PDF file to
  the tab group that is opened after it, or choose Move to Previous Tab Group to move
  the PDF file to the tab group that is opened before it.
- If there is more than one file tab in a group, right-click any file tab in the group and choose Move all tabs to the next group or Move all tabs to the previous group to move all the file tabs in the current group to its next or previous group respectively.
   When all the file tabs have been moved out, the corresponding tab group will be closed automatically.

To exit the parallel view, do one of the following:

- Close all PDF documents to leave only one opened.
- Move all the opened PDF files to the same tab group.
- Close Foxit PDF Reader, and it will return to the normal view when reopened.

# Text Mode, Read Mode, Reflow Mode, Night Mode

### **Text Mode**

With Foxit Text Viewer, you can work on all PDF documents in pure text view mode. It allows you to easily reuse the texts scattered among images and tables, and acts like Notepad. Also, you can adjust some settings to meet your needs.

### **Entering Text Mode**

Do one of the following:

- Choose View > Text Viewer.
- Press the shortcut key Ctrl+6.

#### **Customizing Text Viewer**

As soon as Text Viewer is activated, you can use the Text Viewer Toolbar to customize your own work area. This Toolbar is set to be invisible by default.

### 1. Changing text font when reading with Text Viewer

- Right-click on the text, choose **Font Settings** from the Context Menu, and then select the **Font** option.
- Choose Font name, Font Style, Font Size, Effects, Color and Script from respective fields in **Font** dialog box. The suggested font for best screen display is Courier New.

**Note:** You can change all aspects pertaining to text view font in the **Font** dialog box, or you can also use individual options on Context Menu to change font color and toggle between regular style and Bold or Italic styles.

### 2. Toggling between regular style and Bold style

Select the text and right click on it. Choose **Font Settings** from the Context Menu, and then select the **Bold** option.

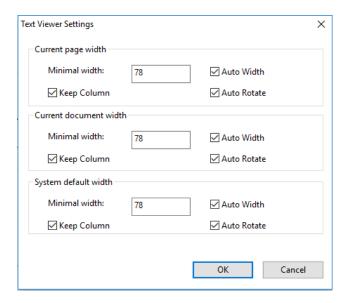
### 3. Toggling between regular style and Italic style

Select the text and right click on it. Choose **Font Settings** from the Context Menu, and then select the **Italic** option.

### 4. Changing Text Viewer settings

• Right-click the text, and choose **Settings** from the Context menu.

The Text Viewer Settings dialog box pops up.



- Below are the text viewer settings:
  - A. Set page width at three different levels: Current page width, Current document width and System default width.
  - B. Minimal width The valid value for this field is 0-1024. It is set to 78 by default.
  - C. Keep Column For PDF tables or text columns, you can check Keep Column to retain appropriate column in text viewer mode. It is checked by default.
  - D. Auto Width For PDF tables or text columns, you can check Auto Width to keep proper width between texts automatically. It is checked by default.
  - E. Auto Rotate You can check Auto Rotate to ensure consistent orientation with that of the printer. It is checked by default.

### **Finding text in Text Viewer Mode**

In Text Viewer mode, you can search and find text in the main body of a PDF file in case-insensitive manner.

To find text you are looking for, follow the steps below:

- Press Ctrl + F.
- Type the text in the Find field.
- Press Enter repeatedly or shortcut key F3 to continue searching the next instances of the search term.

### **Read Mode**

In Read Mode, the PDF will be displayed in a way that hides much of the interface, including navigation pane, toolbar, and status bar, to maximize the document display area. It enlarges the document pane, keeping you from wasting reading space, leaving the tab bar with you for necessary operations.

To read a document in Read Mode, please choose one of the following:

- Choose View > Read Mode.
- Press the shortcut key "Ctrl + H" on the keyboard.
- Right-click the document pane > choose Read Mode.

In Read Mode, a basic toolbar floats at the bottom of the page. It offers some basic commands, such as save, print, and zoom in/out. Please move the cursor to the bottom to activate the floating box.

If you open more than one PDFs, please press "Ctrl + Tab" on the keyboard to switch through them in Read Mode.

To exit the Read Mode, please do any of the following:

- Click the Read Mode button in the View tab.
- Press the shortcut key "Ctrl + H" on the keyboard.
- Click the **Exit Read Mode** button on the floating basic toolbar at the bottom of the screen.
- Right-click the document pane and deselect Read Mode.

### **Reflow Mode**

In Reflow Mode, PDF files are temporarily presented as a single column that is the width of the document pane. It allows you to easily read PDF a document when it is magnified on a standard monitor, without scrolling horizontally to read the text.

To read a document in Reflow Mode, please do one of the following:

- Choose Home > Reflow or View > Reflow.
- Press the shortcut key Ctrl + 4 on the keyboard.

In Reflow Mode, only readable text appears, and comments and form fields will not be displayed. If the Page Display is set as Facing or Continuous Facing before you choose Reflow Mode, it will automatically become Continuous when the PDF document is reflowed. To exit the Reflow Mode, please redo the actions mentioned above.

# **Night Mode**

The Night Mode in Foxit PDF Reader allows you to invert black and white to reduce eye strain in low light conditions. Click **View** > **Night Mode** to enable or disable the Night Mode.

### **Read Out Loud**

Read Out Loud is a Text-to-Speech (TTS) tool. It reads the text in a PDF aloud, including the text in comments and alternate text descriptions for images and fillable fields. Text is read based on the order of the page content. With this feature, you can obtain information without viewing the pages, helping to effectively relief eyestrain. It also enables you to view other materials while listening to the content.

Read Out Loud uses the available voices installed on your system. If you have SAPI 5 voices installed from text-to-speech or language applications, you can choose them to read your PDFs.

**Note**: Read Out Loud isn't a screen reader, it may not be available in some operating systems.

# **Set Reading and Speech Preferences**

Please go to **File** > **Preferences** > **Reading** or **Speech**. For more information, please refer to <u>Reading preferences</u> and <u>Speech preferences</u>.

### **Activate or deactivate Read Out Loud**

You need to activate Read Out Loud before using it.

- > To activate Read Out Loud: select **View** > **Read** > **Read** > **Activate Read**.
- > To deactivate Read Out Loud: select **View** > **Read** > **Read** > **Deactivate Read**.

Tip: You can press the shortcut key Ctrl + Shift + Y to activate or deactivate Read Out Loud, based on the current status of the feature. After activating Read Out Loud, you can <u>read a PDF file</u> and <u>PDF form field</u> out loud.

### Read a PDF Out Loud

- Navigate to the page that you want to read out.
- Choose View > Read > Read > Read Current Page or Read from Current Page.

Tip: If you need to read the text in the comments while reading a PDF out loud, please make sure you have checked **Read comments** option in the <u>Speech preferences</u>.

### **Read PDF Form Fields Out Loud**

- ➤ Go to File > Preferences > Speech, and check Read form fields option.
- In the PDF form, press **Tab** to select the first form field that you want to read out loud, and then press **Tab** to move to the next form field. Foxit PDF Reader will read out the form field as well as the state of selected check boxes and radio buttons.

# **Control Reading**

While reading a PDF file or form field, you can interrupt the reading and adjust reading volume and speed as needed.

- > To adjust the reading speed: choose **View** > **Read** > **Speed** > drag the slider.
- > To adjust the reading volume: choose **View** > **Read** > **Volume** > drag the slider.
- > To pause reading: choose **View** > **Read** > **Pause**.
- ➤ To stop reading: choose **View** > **Read** > **Read** > **Stop**.

### Read and Interact with PDF with Screen Reader

Foxit PDF Reader enables visually impaired users to read and interact with PDF using NVDA (NonVisual Desktop Access), and JAWS (Job Access with Speech). You can change the reading setting in <u>Reading Preferences</u>. While reading a PDF, use the shortcut keys for screen reader to interact with PDF. Contact the vendor for more information about the instructions for using the screen reader with Foxit PDF Reader.

# **Split View**

Using Split View, you can view a PDF with the document pane divided into two panes (Vertically Split or Horizontally Split) or four panes (Spreadsheet Split).

 With the Split View, you can scroll, change the magnification level, or turn to a different page in the active pane without affecting the other pane(s).

To change to Split View, choose View > Split command  $\frac{\Gamma_{L,J}}{\Gamma_{L,J}}$  > Vertically Split or Horizontal Split.

• The Spreadsheet Split view is useful if you want to keep the vertical or horizontal

headings visible while scrolling through a large spreadsheet or table of the current page. In this mode, changing the magnification in one pane can make the magnification in all panes be changed in the same time. Also, scrolling is coordinated among the panes.

**Note**: If you stay in the same page when scrolling horizontally, the above two spans which show the headings will not be scrolled. But if you scroll to the next page, the above spans will also skip to show the headings of the next one's. When scrolling vertically, the two panes in the same queue will be scrolled, while the panes next to them will not.

To change to Spreadsheet Split View, you should choose **View** > **Split** command **Spreadsheet Split**.

# **Line Weights View**

In Line Weights View, the lines will be displayed with the weights defined in the PDF file. When Line Weights View is turned off, the lines will be displayed with the constant stroke width (1 pixel), regardless of zoom.

- To enter Line Weights View, please choose **View > View Setting > Page Display**, and then check **Line Weights** option.
- To exist Line Weights View, please choose View > View Setting > Page Display, and then uncheck Line Weights option.

### Full Screen Mode & Fit the Window Mode

### **Full Screen Mode**

In Full Screen mode, Foxit PDF Reader Document Pane fills the entire screen, with Tab Bar, Toolbar, Status bar, and Bookmarks pane hidden behind. The mouse pointer remains active in Full Screen mode so that you can click links.

- **1.** To set Full Screen preferences, please refer to <u>"Setting Full Screen Preferences"</u>.
- 2. To enter Full Screen mode, please do one of the following:
- Click the Full Screen button on the right of the status bar.
- Press the shortcut key F11.
- Right-click the Document Pane and select **Full Screen**.

**3.** To adjust the view in Full Screen mode, right-click the document and work with the Context Menu.

**Note:** This feature will not be available unless you clear **Left click to go forward one page; right click to go back one page** check box in the Preferences dialog.

- 4. To exit full screen mode:
- Press Esc key or the shortcut key F11.

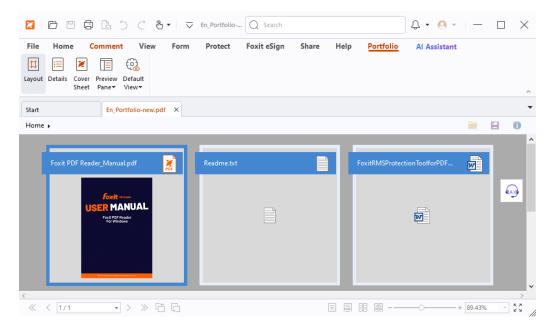
### Fit the Window Mode

There are four types for you to choose:

- To resize the page to fit entirely in the document pane, choose Home > Page Fit
   Option > Fit Page, or right-click the Document Pane and choose Fit Page.
- To resize the page to fit the width of the window, choose Home > Page Fit Option >
  Fit Width, or right-click the Document Pane and choose Fit Width. Part of the page
  may be out of view.
- To resize the page to its actual size, choose **Home** > **Page Fit Option** > **Actual Size**, or right-click the Document Pane and choose **Actual Size**.
- To resize the Document Pane to fit page by visible area, choose Home > Page Fit
   Option > Fit Visible.

### **View PDF Portfolios**

PDF portfolios are a combination of files with different formats such as Word Office files, text documents and Excel files. Foxit PDF Reader supports viewing and printing PDF portfolios, as well as searching keywords in the portfolio.



A Sample PDF Portfolio

### The portfolio window overview

When you open a PDF portfolio with Foxit PDF Reader, the **Portfolio** context tab appears on the ribbon with the related commands. And the portfolio window below the ribbon may display elements including a component files (files and folders) list, a preview pane, and a secondary toolbar. The elements are displayed in different positions depending on the view mode you choose.

There are three portfolio view modes:

- In the **Layout** mode, the component files are displayed as small squares with icons corresponding to their file types in the portfolio window. Click a file to show the preview of the file on the preview pane. The secondary toolbar is presented on the component files.
- In the **Details** mode, the component files are listed with detailed information by displaying various columns in the portfolio window, including Name, Description, Size, and Modified. The secondary toolbar is presented on the component files list. **Tip**: To set which columns to display in the component files list, right-click on any file or blank area in the portfolio window, choose **View**, and select the desired columns.
- In the **Cover Sheet** mode, the portfolio window only shows the cover sheet of the portfolio, which is a PDF page displaying the logo of Foxit PDF Editor and prompts you to download Foxit PDF Reader/Editor for the best experience.

You can switch the view mode at any time by clicking **Layout**, **Details**, or **Cover Sheet** in the **Portfolio** context tab as needed. In both the **Layout** and **Details** view modes, you can:

- Change the position of the preview pane by clicking Preview Pane and choosing Right or Bottom (or choose Off to minimize or hide the preview pane).
- Right-click on any file or blank area in the component files list and select **Read Mode** to display the portfolio in Read Mode with toolbar collapsed for maximum displaying space.
- Switch to the **Cover Sheet** mode by right-clicking on any file or blank area in the component files list and choose **Cover Sheet** in the context menu.

To set the default view for any PDF portfolio when it is opened in Foxit PDF Reader, choose **Default View** and select a view mode. If you select **Retain Original**, the initial view of a portfolio will be used when you open the portfolio.

# View component files in a PDF portfolio

The preview pane in the portfolio window allows you to quickly preview a file without opening it in its native application.

You can also open a component file in its native application (if installed on your computer) by doing any of the following:

- Double-click the file in the portfolio.
- Select the file and click button in the secondary toolbar.
- Right-click the file and choose **Open File in Native Application**.

**Tip**: For non-PDF component files (e.g., TXT files), Foxit PDF Reader allows you to preview and open them if the security setting allows. For more information, please refer to "Security Settings for Non-PDF Attachments".

To view the properties of a component file, right-click the file in the portfolio and choose **Show Information**. Or select the component file and click the button in the secondary toolbar.

You can find text in PDF component files and print the files directly in the preview pane using the **Advanced Search** feature and the **Print** command. For a component file that is a non-PDF file, you need to open the file in its native application to search and print it.

To copy text in a component file, you can directly copy the selected text in the preview pane by pressing Ctrl + C or choosing the **Copy** command from the right-click menu.

# **Adjusting the View of Documents**

Foxit PDF Reader provides multiple commands that help you adjust the view of your PDF documents. It includes simple commands such as Zoom In and Zoom Out, as well as more advanced features like setting the page layout and orientation. As for some settings, please refer to "Setting Preferences".

# **Changing the Orientation of a Document**

You can change the orientation of the document from portrait to landscape view by using the Rotate commands.

Choose View or Home > Rotate View > Rotate Left or Rotate Right.

**Note:** You can change the page view in 90-degree increments, but the change only affects screen display instead of its actual orientation. You cannot save the changes in page view.

# **Changing the Magnification Level of a Document**

Do one of the following procedures:

- 1. Go to Home > Zoom > Zoom Out or Zoom In.
- 2. Adjust a magnification percentage in the Magnification Percentage Area on the Status Bar.
- 3. Go to **Home** > **Zoom** > choose a magnification percentage.
- 4. Right-click the Document Pane > choose **Zoom In** or **Zoom Out**.
- 5. Using the Marquee Command

The Marquee command allows you to zoom in or out on a selected area of your document for a clear view. To use the Marquee command, please follow the steps below:

- Choose View > Assistant > Marquee.
- The cursor changes into <sup>♠</sup>, drag a rectangle on the page or just click on the page to increase the magnification by one preset level, centering on the point where you clicked.
- Choose the Marquee command, the cursor changes to  $\ \ \, \bigcirc \ \ \,$  as Ctrl-click on the page. Drag a rectangle on the page or just click on the page to decrease the magnification.

### 6. Using the Loupe Command

The Loupe command allows you to easily change the magnification of a PDF file. It is best used when you want to keep a PDF file at a standard zoom level (like 100%), but magnify certain areas. To use the Loupe command, please follow the steps below:

- Choose View > Assistant > Loupe.
- Move the loupe tool to the places you want to view, you will see the amplificatory or decreased objects in the **Loupe Tool** dialog box.
- (Optional) Select the Lock option in the Loupe Tool dialog box. Click the area of the
  document you want to view in closer detail. A red rectangle appears in the document,
  corresponding to the area shown in the Loupe Tool window. You can drag or resize
  the rectangle to change the Loupe command view.
- To change the scale ratio of the Loupe Tool, you can either enter a value in the zoom text box, or drag the slider in the **Loupe Tool** dialog box.

### 7. Using the Magnifier

You can easily magnify areas of the PDF files as you work on Foxit PDF Reader with the Magnifier. It is especially useful for visually impaired people with some functional vision.



- Choose View > Assistant > Magnifier.
- Move the Magnifier to the places you want to view.
- To switch between Magnifier and Fisheye Magnifier, press the left mouse button.
- To change the size of magnifier window, press the right mouse button.
- To turn off the Magnifier, choose any other commands or press **ESC** Key to directly return to Hand command.

### **Changing the Page Layout**

Changing page layout is especially useful when you want to zoom out to get an overview

of the document layout. Foxit PDF Reader provides the following page layouts:

- Single Page Displays one page in the document pane at a time.
- Continuous Arranges the pages in the document pane in a continuous vertical column.
- Facing Arranges the pages side by side, displaying only two pages at a time.
- Continuous Facing Arranges the pages side by side in a continuous vertical column.
- Separate Cover Page-Show Cover Page During Facing.

If a document has more than two pages, the first page can be displayed alone on the right side of the document pane in Facing and Continuous Facing views.

To display the cover page as the first page on the right followed by two facing pages, please choose the Facing or Continuous Facing mode, and then select **View** > **Separate Cover** 



To set page layout, please do one of the following:

- Choose **View** and choose one of the modes to your needs.
- Click the Single Page button , the Continuous button , the Continuous Facing button , or the Facing button on toolbar or the Status Bar.

Tip: By default, Foxit PDF Reader will display the pages from left to right in facing and continuous facing mode. If you want to change the reading direction, please choose **File** > **Preferences** > **Languages** > **Default Reading Direction** > **Right to Left**.

# **Navigating in Documents**

Foxit PDF Reader provides user-friendly controls to navigate through PDF documents. You can navigate in PDF documents by paging through or by using navigational commands.

# **Scrolling through Documents**

### 1. Navigating around Documents

Do one of the following:

### Using mouse actions or keystrokes

> To navigate around the documents vertically, scroll the mouse wheel or press the

Down or Up Arrows on the keyboard.

To navigate around the document horizontally, press Shift and scroll the mouse wheel.

While scrolling in a document, you can lock the scroll direction to prevent the document from being scrolled out of place, especially when the document is zoomed in and scrolled within tablets. The steps are as follows:

- Choose File > Preferences > General, and check the Show scroll lock button option under the Status Bar to enable scroll lock. Once enabled, the scroll lock icons will be displayed in the Status Bar.
- Click on the Status Bar to lock the scroll horizontally.
- > Click on the Status Bar to lock the scroll vertically.
- Click both and on the Status Bar to freeze the screen so that you can read the current view of the document.

### Scroll automatically

Automatic scrolling allows users to view documents without using mouse actions or keystrokes. Foxit PDF Reader also enables you to change the scrolling speed with ease.

- A. Choose View > AutoScroll.
- B. Do one of the following:
- To increase or decrease the scrolling speed, press the Up Arrow or Down Arrow key, depending on the direction of scrolling. To change the scrolling speed to a specific speed, press a number key (9 for the fastest, 0 for the slowest).
- To reverse the direction of scrolling, press the minus sign (-) key.
- > To jump to the next or previous page, press the Right Arrow key or Left Arrow key respectively.
- > To stop automatic scrolling and go back to Hand command mode, click **AutoScroll** again or press the **Esc** key.
- To pause automatic scrolling, press Space key.

**Tip:** To perform auto-scrolling when you have enabled the middle mouse button to auto scroll in <u>Preferences</u>, you can also click the Hand command, press the middle mouse button/wheel mouse button, and then move the mouse to scroll the pages. You can press the middle mouse button/wheel mouse button again to exit AutoScroll mode.

### 2. Going to the next or previous page

Do one of the following:

- Click the **Previous Page** button or the **Next Page** button on the Status
- Put the cursor in the Document Pane, press the Page Up or Page Down keys to turn the pages.
- Put the cursor in the Document Pane, press the Left or Right Arrows on the keyboard to move the pages up or down.
- Press Space to scroll the page down or press Shift + Space to scroll the page up.

### 3. Going to the first or last page

Do one of the following:

- Click the **First Page** button or the **Last Page** button on the Status Bar.
- Press the **Home** or **End** keys.

### 4. Going to a specific page

Input or select the specific page number on the Current Page Number Box on the Status Bar, and press **Enter**.

**Note:** If your PDF contains formatted page numbers, and the **Use logical page numbers** option is enabled in **File** > **Preferences** > **Page Display**, you should input the numbers that match the numbering on the pages rather than the physical page numbers. For instance, if you want to view the second page of your document which is numbered ii, you should enter ii to go to the page. See also the preference setting on <u>logical page numbers</u>.

### 5. Retracing your steps

To go back or forward one page, click the **Previous View** button on the Status Bar.

# **Navigating With Bookmarks**

Bookmark displays the list of bookmarks that the document contains. Generally speaking, it is a visual table of contents that represents the chapters, main headings, and other organizational elements in a document.

- 1. To show or hide bookmarks, do one of the following:
  - Choose View > View Setting > Navigation Panels > Bookmarks.

- Click the Bookmark button on the Navigation pane.
- If you want to hide the Bookmarks panel after you click a bookmark, click the
   Options menu at the top of the Bookmarks panel and select Hide After Use, which
   makes the document area wider and improves the reading experience. To keep
   showing the Bookmarks panel after you click a bookmark, deselect Hide After Use.
- 2. Click the plus sign (+) or minus sign (-) next to the parent bookmark to expand or collapse the parent bookmark respectively. You can also right-click any bookmark in the Bookmarks panel (or click the **Options** menu at the top of the Bookmarks panel) and choose **Expand/Collapse All Bookmarks** to expand or collapse all the bookmarks in the current PDF file.
- 3. (Optional) To quickly search and find the specific bookmarks, input the keywords in the Search box in the Bookmarks panel. Foxit PDF Reader will list all the bookmarks matching your search with the keywords highlighted in yellow.
- 4. To jump to a topic, click the bookmark or right-click the bookmark and then choose **Go to Bookmark**. Click the plus (+) or minus (-) sign to expand or collapse the bookmark contents.

### Tip:

- a) When you navigate through the PDF document, the highlighted bookmark icon will automatically be kept in sync with the current page.
- b) When viewing bookmarks, you can press the **Ctrl** key and scroll your mouse (or click  $A^+$  or  $A^-$  at the top of the Bookmarks panel) to increase or decrease the text size of bookmarks. If a bookmark is too long to be displayed in the Bookmarks panel, you can right-click the bookmark (or click the **Options** menu at the top of the Bookmarks panel) and select **Wrap Long Bookmarks** to wrap it to multiple lines for a better view. To unwrap the long bookmarks, deselect **Wrap Long Bookmarks**.
- 5. To find the current bookmark

To find the current bookmark for the displayed page of the PDF document, do one of the following:

- Click the **Find Current Bookmark** button  $\Box$  at the top of the Bookmarks panel.
- Click the Options menu at the top of the Bookmarks panel, and choose Find
   Current Bookmark.

If the bookmark was hidden in a collapsed parent bookmark, the parent bookmark will be opened, and the corresponding bookmark which is nearest to the current page's location will be highlighted, so that users can see the selected bookmark and locate the related item on the current page.

# **Navigating with Page Thumbnails**

Page thumbnails are reduced-size versions of PDF pages. It provides miniature previews of document pages and makes it easier to view and recognize them. The red box on the page thumbnail indicates which area of the page appears.

- **A.** To show or hide page thumbnails, do one of the following:
  - Choose View > View Setting > Navigation Panels > Pages.
  - Click the Page button on the Navigation pane.
- **B.** To navigate with page thumbnails, do one of the following:
  - To jump to another page, click its thumbnail.
  - To move to another location of the current page, drag and move the red box in its thumbnail.
  - To resize the visible area of the current page, drag the resize handle on the bottom right corner of the red box.
  - To resize page thumbnails, do any of the following:
    - Right-click on a thumbnail, and then choose Enlarge Page Thumbnails or Reduce Page Thumbnails.
    - ♦ Click or on the top of Pages panel to enlarge or reduce page thumbnails separately.
    - ♦ Use CTRL + mouse wheel scroll.
- **C.** In the Single Page Displaying Mode, the page thumbnails will show up when dragging the scrollbar to view the page.
- **D.** In the Pages panel, you can also do any of the following to work on page thumbnails if necessary.
  - To specify the tab order for a selected page, right-click on a page thumbnail, and select **Properties**. Then select an order as desired in the **Tab Order** tab.
  - To add an action to a page, right-click on the page thumbnail, and select
     Properties. In the Page Properties dialog box, click the Actions tab, and choose
     a trigger method and action.
    - > Select Trigger Specify the user action that initiates an action.
    - Select Action Specify the event that occurs when the user triggers the action.

- → To execute a menu item, select Execute a menu item > click Add > select one of a menu item in Menu Item Selection dialog box, and click OK.
- ♦ Go to a page view designate to a specific page view. You can jump to a page either in the current PDF or in another PDF. Before setting the position, you may also change the current zoom settings. To go to a page view, choose this option, click Add button and do the following:
  - Set the position in current document scroll the current document, go to a new position where you want to set, and click **Set this** position.
  - Set the position in another PDF document click the **Open** button

on the Quick Access Toolbar (or choose **File** > **Open**) > select the PDF you want to set position to > scroll this document and go to a position where you want to set > click **Set this position**.

**Tip:** The new PDF document should be opened in the existing window but not a new window.

- → To import form data, select Import form data > click Add > choose the
  FDF file that contains the form data you want to import, and click Open.
- ♦ Open a web link designate to open a web link. To do this, choose **Open** a web link > click **Add** button > enter the URL of the destination web page > click **OK**.
- ♦ Open/execute a file designate to open another file. To do this, choose Open/execute a file > click Add button > select the destination file and click Open.
- → To read an article, select Read an article > click Add > choose an article, and click OK.
- ♦ To reset a form, select **Reset a form** > click **Add** > select the fields that will be reset, and click **OK**.
- → To run a JavaScript, select Run a JavaScript > click Add > enter JavaScript, and click OK.
- → To set the visibility of a layer, select Set Layer Visibility > click Add, and confirm your operation.
- → To show/hide a field, select Show/hide a field > click Add > choose to show or hide the selected button when the user triggers the action, and click OK.
- → To submit a form, select **Submit a form** > click **Add** > choose the export format, submission method, decide which fields should be submitted, and click **OK**.
- > Actions Display the list of triggers and actions that you have defined. You can click the buttons in the **Actions** group to reorder, edit or delete a selected

action.

# **Navigating with Links**

Links take you to another location in the current document, or to locations in other documents or websites. Clicking a link on PDF documents is just the same as in other applications. You can follow a link by doing the following:

- Select the Hand command.
- Position the pointer over the link until the pointer changes to the hand with a pointing finger .

# **Navigating with Article Thread**

PDF articles are optional electronic threads defined by the PDF author, which lead readers through the PDF contents presented in multiple columns and across a series of pages. If you are reading a PDF file that contains articles, you can show the article names and navigate through them easily.

- 1. To view the articles in the document, open the **Articles** panel in the navigation pane and do any of the following to start viewing:
  - Double-click the article you want to view.
  - Right-click the article you want to view and choose Read Article from the context menu
  - Select the article you want to view and choose **Read Article** from the options menu in the upper left corner of the **Articles** panel.
- 2. The pointer will change into and you will be switched to the beginning of the article (the area of the first defined article box). The page view may zoom in or out automatically so that the current part of the article fills the screen, with the first line appearing in the upper left corner.
- 3. During the article viewing, do any of the following:
  - Click in the article or press **Enter** to navigate to the area of next article box.
  - Shift-click in the article or press Shift + Enter to navigate to the area of previous article box.
  - Ctrl-click within the article to go to the beginning of the article.
- 4. At the end of the article (the area of the last defined article box), the pointer will change
  - into and clicking in the article will return to the beginning of the article.

### Note:

1. Before viewing an article, make sure you have selected the Hand tool and the option

- Make Hand Tool read articles in the File > Preferences > General.
- 2. You can select **Hide After Use** in the options menu in the upper left corner of the **Articles** panel to hide the panel after the article viewing starts.

## Work on 3D Content in PDFs

Foxit PDF Reader supports a variety of 3D file formats including U3D (Universal 3D), PRC (Product Representation Compact), and glTF (GL Transmission Format). You can view, navigate, measure, and comment on 3D content in PDF documents. The Model Tree, the 3D toolbar, and the right-click menu of 3D content can help you work on 3D content easily. You can show/hide parts of a 3D model, set different visual effects, rotate/spin/pan/zoom a 3D model, add comments/measurements to a part of a 3D model, and more.

**Note**: By default, Safe Reading Mode is enabled, when you open a PDF with 3D content for the first time, a dialog box pops up to ask whether you trust the document to enable/activate the 3D content in it, and you can select an option to trust the document one time only or always trust the document. Selecting **Trust this document always** in the dialog box also adds the document to the privileged locations, and the dialog box will not prompt next time you open the PDF. See also <u>Privileged Locations</u>. Note that the dialog box does not necessarily pop up when you open a 3D PDF. Sometimes it pops up only when you click on the 3D content in the PDF. When it pops up is determined by the activation settings of the 3D content. And the message displayed in the pop-up dialog box varies depending on your trust settings for Foxit PDF Reader. See also <u>Security settings</u> and <u>Trust settings</u>.

# **Display 3D models**

Foxit PDF Reader provides the Model Tree and various navigation tools and options for you to show or hide parts of a 3D model, turn it around to view it from all orientations, even look at the inside structure clearly by hiding and turning parts around.

When you open a 3D PDF and enable the 3D model, the 3D toolbar appears above the upper-left corner of the 3D canvas (an area where the 3D model appears). In the lower-left corner of the canvas shows the 3D axes (X-axis, Y-axis, and Z-axis) that indicate the current orientation of the 3D model in the scene. **Note**: If the 3D model is not enabled (or activated) after you open the PDF, only a 2D preview image of the 3D model is displayed in the canvas.

**Tip**: For most 3D-related tools and options, you can find them from the context menu after right-clicking the 3D model.

#### Show/hide parts of a 3D model

When the 3D model is enabled, click the **Model Tree** panel in the navigation pane, where

you can view the 3D scene structure and the preset views. Check/uncheck the appropriate checkbox to show/hide the corresponding part of the 3D content. You can also click the **Toggle Model Tree** icon on the 3D toolbar to show or hide the Mode Tree panel.

The **Model Tree** panel contains three panes: the **Structure** pane, the **View** pane, and the **Object Data** pane.

- The Structure pane: the topmost pane in the Model Tree panel. In this pane, you
  can view the tree structure of the 3D content and show/hide parts of the 3D
  content.
- The View pane: the middle pane in the Model Tree panel. It shows a list of available 3D views associated with the 3D content.
- The **Object Data** pane: The lower pane in the **Model Tree** panel. It displays the information such as properties and metadata associated with an object/part you select in the **Structure** pane or the **View** pane.

## Navigate through a 3D model

On the 3D toolbar (or after right-clicking the 3D model and choosing **Tools**), select a desired 3D navigation tool to manipulate the 3D model.

#### Rotate

Rotating a 3D model allows you to turn it around in the desired direction. Click the model, hold the left mouse button, and move the mouse in the direction you want it to rotate.

#### Spin

Spinning a 3D model turns a 3D model in parallel around the X-axis and Y-axis. Click the model, hold the left mouse button, and move the mouse in the direction you want it to spin.

#### • Pan

The Pan tool allows you to move the model vertically and horizontally. Click the model, hold the left mouse button, and move the mouse in the desired direction.

#### Zoom

With the Zoom tool selected, click and drag the left mouse vertically to move toward or away from the 3D model. If you right-click and drag an area on the 3D model, that area will be magnified and fill the document window.

#### Walk

The Walk tool is useful for navigating through an architectural 3D model like rooms or buildings. For example, the 3D model is a two-story building and you can simulate walking through the building. Click and drag the mouse vertically up and down to go

forward and backward, and drag the mouse horizontally left or right to turn left or right in the building. The Walk tool maintains a constant elevation as you drag the mouse. So moving upstairs or downstairs in the building is not available for the Walk tool (You need to use the Fly tool instead).

#### Fly

The Fly tool lets you navigate through the 3D model while maintaining the surface orientation, which is useful when viewing an architectural or a landscape model. When "flying" through a model, you are not constrained by the elevation, so you appear to "fly" over an area in a model. With the Fly tool selected:

- Click and drag the left mouse in the direction you want to look at. The Fly tool moves the view more slowly (which seems to increase the magnification) the closer you approach an object.
- o Right-click and drag the mouse does not change the magnification.
- o Scroll the mouse wheel to move backward and forward in the scene.

## The display settings for a 3D model

From the 3D toolbar (or after right-clicking the 3D model and choosing **View Options**), choose an option as appropriate to modify the display settings for a 3D model.

#### • Use Orthographic/Perspective Projection

Click the **Use Orthographic/Perspective Projection** icon on the 3D toolbar to toggle between displaying perspective and orthographic projection of the 3D model.

#### • Model Render Mode

Click the **Model Render Mode** icon on the 3D toolbar and choose a desired mode from the drop-down list for the appearance of the 3D shape.

#### Enable Extra Lighting

Click the **Enable Extra Lighting** icon on the 3D toolbar and choose a desired lighting effect from the drop-down list.

#### Background Color

Click the **Background Color** icon on the 3D toolbar and choose a desired color from the color picker for the space surrounding the 3D content.

#### Toggle Cross Section

Click the **Toggle Cross Section** icon on the 3D toolbar and choose **Show/Hide Cross Section** to show or hide the cross-sections of objects. The **Cross Section Properties** option allows you to define the cross-section properties listed as follows.

- **Enable Cross Section**: Check this option to show the cross-sections of objects, and make other cross-section properties available.
- **Alignment**: Determine the axis along which the cross-section is aligned.

- > **Show Intersections**: Specify whether to add a colored outline (Red by default) to indicate where the cutting plane slices the 3D model. You can click the color palette to change the outline color.
- > **Show Cutting Plane**: Specify whether to display the two-dimensional field that cuts the 3D model. Foxit PDF Reader displays the two-dimensional field in light blue by default. You can select a different color from the color palette next to the option, or adjust the opacity by inputting a value (or clicking the up/down arrow) in the **Cutting Plane Opacity** field.
- ➤ **Ignore Selected Parts**: When this option is checked, Foxit PDF Reader will not display the cross-section for the selected parts.
- > **Show Transparent**: Check this option to display the parts that are not part of the cross-section.
- ➤ **Offset**: Define how much of the 3D model is sliced. To change the offset, drag the slider or change the value in the field beside the option.
- > **Tile 1/Tile 2**: Define the angles between the cutting plane and axes. To change the angle, drag the slider or change the value in the field beside the option.
- **Flip**: Check this option to reverse the cross-section.

Tip: The changes to the cross-section properties are applied immediately to the 3D module. If necessary, adjust the **Cross Section Properties** dialog box appropriately to make sure that it does not block your view of the active 3D model.

## Change the camera properties

On the 3D toolbar (or after right-clicking the 3D model and choosing **Tools**), select **Camera Properties** to define the precise angle and positioning for a view of a 3D object. The camera properties can be saved as presets, which can be used across views and files.

- **Camera Preset**: Options in this group allow you to save and manage camera presets. When you have configured the camera properties, you can click **Save As** to save it as a preset. All the camera presets can be found in the **Camera Preset** drop-down list, and can be applied across files when you define a camera view. If you want to delete a preset, select it from the **Camera Preset** drop-down list, and click **Delete**.
- **Angle units**: This option allows you to switch the value between Camera X/Camera Y/Camera Z and Azimuth/Altitude/Distance. Camera X, Camera Y, and Camera Z define the position of the camera in the coordinate system. The Azimuth, Altitude, and Distance allow you to manipulate the camera by azimuth (distance) and altitude (X-axis), and to zoom using the distance value. To adjust the position, drag the corresponding slider or change the value in the field beside the option.
- **Target X/ Target Y/Target Z**: Define the direction in which the camera looks. To adjust the direction, drag the corresponding slider or change the value in the field beside the option.
- Field of Views: Change the focal angle of the camera. To adjust the parameter, drag

the slider or change the value in the field beside the option.

• **Roll**: Change the roll angle of the camera. Drag the slider or change the value in the field beside the option to adjust the parameter.

Tip: The changes to the camera properties are applied immediately to the 3D module. If necessary, adjust the **Camera Properties** dialog box appropriately to make sure that it does not block your view of the active 3D model.

## 3D views

In the **View** pane of the **Model Tree** panel and in the **Views** list on the 3D toolbar, you can see a list of available views. Select the desired view to switch among the views.

## Display a view

In the **View** pane of the **Model Tree** panel:

- Select an existing view to display the view.
- Click on the Previous View or Next View icon at the top of the View pane to switch
  to the previous or next view in the views list. (You can also find Previous View or
  Next View in the Options menu or in the context menu after right-clicking
  anywhere in the View pane.)
- Click on the **Default View** icon at the top of the **View** pane to display the default view of the 3D model. The default view lets you quickly revert to the initial or a predefined view that is set as default at any time as you work on 3D content. To change the default view, select an existing view that you want to set as default in the **View** pane, right-click it (or click the **Options** menu at the top of the **View** pane), and choose **Set as Default View**.

On the 3D toolbar, you can also select a view from the **Views** list to display it, or click on the **Default View** icon to switch to the default view of the 3D model. Or, just right-click anywhere anytime in the 3D canvas, choose **Views**, and select a view to display it.

#### Add a 3D measurement to a 3D model

With the 3D Measurement Tool, you can measure the distance between two points and the angle between two edges of a 3D model.

- 1. On the 3D toolbar (or after right-clicking the 3D model and choosing **Tools**), select the 3D Measurement Tool.
- 2. Then the measuring toolbar and the 3D Measurement Tool Info window appear in the upper-right and lower-right corner of the 3D canvas respectively. You can drag them

- anywhere within the 3D canvas as needed.
- 3. Select measurement types, snapping types, and set the scale ratio on the measuring toolbar. The 3D Measurement Tool Info window displays the information about the measurement (such as the current measurement result and scale ratio) and acts as a wizard for your measurement.

#### Measurement types:

- Select 3D Point to Point Measurement to measure the distance between two
  points on the 3D model. Click the first point, move the pointer to the second
  point, and click. Then the result information (the current measurement result)
  appears. Move the pointer and click a third time where you want to locate the
  result information.
- Select **3D Perpendicular Dimension** to measure the perpendicular distance between two straight edges that are parallel. Click the first point on an edge, move the pointer to the second point on the other edge, and click. Along with the result information, the line leaders on both sides of the measurement points appear as you move the pointer. Move the pointer and click a third time to determine the leader length and set the location of the result information.
- Select 3D Radial Dimension to measure the radius of a circular part or a round shape you specified/clicked. With the 3D Snap To Radial Edges option enabled, move your cursor to the edge of a circular part so that a circle appears, and double-click to confirm the measurement. Along with the result information, an arrow appears as you move the pointer and points to the measured circle. Move the pointer and click to set the location of the result information. Without 3D Snap To Radial Edges option enabled, click on three points to specify a round shape you want to measure and then click to specify the location of the result information.
- Select **3D Angle Measurement** to measure the angle between two edges (or three points). Click three points (A, B, and C) on the 3D model to measure the angle (between the line BA and the line BC). Along with the result information, the line leaders on both sides of the first and third measurement points (A and C) appear as you move the pointer. Move the pointer and click a third time to determine the leader length and set the location of the result information.

#### Snapping types:

- **3D Snap To Edge Endpoints**: snap to the endpoint of an edge when moving the cursor toward the end of the edge.
- **3D Snap To Linear Edges**: snap to a straight-line segment of an edge when moving the cursor over the edge.
- **3D Snap To Radial Edges**: snap to the circumference of a circular part when moving the cursor over the circular part.
- 3D Snap To Silhouettes: snap to the silhouette for a part (the apparent edge

of the part, e.g., the side of a cylinder) when moving the cursor over the part.

• **3D Snap To Planar Faces**: snap to the geometric plane for a face of a part when moving the cursor over the face.

In the **Default View** of the 3D model or with no existing view selected, adding 3D measurements creates a new view in the **View** pane of the Model Tree, with the default name of "**MeasurementView[n]**". You can double-click the view name to rename it. The 3D measurement will be listed under the created view (as a child of the view), named "Measurement1", "Measurement2", and so on.

If the 3D measurement is added to an existing view, the 3D measurement will be listed under that view.

- 4. (Optional) Clicking on the result information highlights it, and the discontinuous icon (four-way arrow) appears. By dragging the icon, you can adjust the location of the result information.
- 5. (Optional) To delete a 3D comment, right-click it in the **View** pane of the Model Tree and choose **Delete**.

#### Note:

- 1. 3D measurements added to a 3D model are associated with the corresponding views. The measurements associated with a view will be invisible once you switch to another view, but will show again when you switch back to the view. However, if you delete a view, the associated 3D measurements will also be removed.
- 2. You can press the Esc key to exit the 3D Measurement mode and return to the last selected navigation mode (such as Rotate) at any time as you measure the 3D model.

#### Comment on a 3D model

#### Add a 3D comment to a 3D model

You can use the **Add 3D Comment** tool to add a 3D comment to a particular part of a 3D model, for example, to provide the coordinate information or the name of the part. A 3D comment contains a text box and a connector line that connects the text box and the part of the 3D model you want to comment on.

- 1. On the **3D** toolbar (or after right-clicking the 3D model and choosing **Tools**), select **Add 3D Comment**. The cursor changes into a Cross i automatically.
- 2. Put the cursor over the desired position you want to comment on and click. Then move the cursor and click again to set the location of the text box.
- 3. In the pop-up dialog box, enter a comment string, and click **OK** to complete or click **Cancel** to discard the comment.
  - In the **Default View** of the 3D model or with no existing view selected, adding 3D comments creates a new view in the **View** pane of the Model Tree, with the default

name of "**3DCommentView[n]**". You can double-click the view name to rename it. The 3D comment will be listed under the created view (as a child of the view), named "3DComment1", "3DComment2", and so on.

If the 3D comment is added to an existing view, the 3D comment will be listed under that view.

- 4. The 3D comment will also be listed in the **Comments** panel in the navigation pane.
- 5. (Optional) After adding the comment, click on the text box, and a handle (a small red square icon) appears in the upper-left and lower-right corner of the text box. Click and drag the upper-left handle to resize the box. If the text box is not large enough for the text content, the text exceeding the boundaries of the text box will be invisible. Click and drag the lower-right handle to move the box.
- 6. (Optional) To edit a 3D comment, right-click it or click the icon beside it in the **Comments** panel and choose **Edit**.
- 7. (Optional) To delete or reply to a 3D comment, right-click it in the **View** pane of the Model Tree (or right-click it in the **Comments** panel), and choose **Delete** or **Reply**.

#### Note:

- 1. Comments added to a 3D model are associated with the corresponding views. The comments associated with a view will be invisible once you switch to another view, but will show again when you switch back to the view. However, if you delete a view, the associated 3D comments will also be removed.
- 2. You can press the Esc key to exit the 3D Comment mode and return to the last selected navigation mode (such as Rotate) at any time as you add a 3D comment to the 3D model.

#### Add comments using the tools in the Comment tab

You can add comments to a 3D view using the commenting tools in the **Comment** tab.

- 1. Choose a commenting tool from the **Comment** tab.
- 2. Click inside the 3D canvas to create a comment.

In the **Default View** of the 3D model or with no existing view selected, adding comments creates a new view in the **View** pane of the Model Tree, with the default name of "**CommentView[n]**" ([n] is a number that depends on how many existing Comment views are listed in the **View** pane. For example, if there are two Comment views before the new view is created, n will be 3.). You can double-click the view name to rename it. The comment will be listed under the created view (as a child of the view), named after the comment author. In front of the name shows the icon of the comment type. Clicking the comment in the **View** pane to view more information on the comment in the **Object Data** pane.

If the comment is added to an existing view, the comment will be listed under that view.

3. The comment will also be listed in the **Comments** panel in the navigation pane. You can move, edit, delete, and reply to the comment. See also <u>Chapter 5 – Comment</u>. (You can also delete the comment directly in the View pane of Model Tree.)

#### Note:

- 1. The comments added from the **Comment** tab are associated with the corresponding views. They will be invisible once you switch to another view, but will show again when you switch back to the corresponding view.
- 2. For comments added from the **Comment** tab, after their associated views are deleted, you can still find them in the **Comments** panel.
- 3. The Pencil comments added will not be listed under any view and will be always shown until they are deleted.

#### Convert 3D measurements to comments

You can convert 3D measurements to comments to be reviewed, annotated, and replied to.

- 1. In the **View** pane of the **Model Tree** panel, expand a view, right-click a 3D measurement you want to convert, and choose **Convert to Comment**.
  - The conversion leaves the name of the original measurement (unchanged) as the name of the converted comment, and the comment is still listed in the same view in the **View** pane. If you click the comment in the **View** pane, the **Object Data** pane will show the author who converted the measurement and the conversion time.
  - The converted comment is also displayed in the comments list in the **Comments** panel in the navigation pane.
- 2. (Optional) You can edit, delete, and reply to the comment in the **Comments** panel by right-clicking the comment and choosing **Edit/Delete/Reply**. Or delete and reply to the comment directly in the **View** pane of **Model Tree** by right-clicking it and choosing **Delete/Reply**. (*Note:* A comment converted from a 3D measurement is still associated with the corresponding view. If you delete the view, the comment will also be removed.)
- 3. (Optional) You can also move the result information. Please refer to Add a 3D measurement to a 3D model.
- 4. (Optional) To change the comment back to a 3D measurement and remove all the associated comments, right-click it in the **View** pane and choose **Remove Associated Comment**, or right-click it in the **Comments** panel and choose **Delete**.

# **Finding Text**

Foxit PDF Reader provides handy commands to find text. You can not only search text in a PDFs, folders, or disks, but also in portfolios. Also, you can limit your search by choosing the options offered in the Search window to find specific items.

# **Finding Text in the Current PDF**

- Click in the Search field on the title bar and click on the **Show matching text results** box in the drop-down menu (or press the shortcut keys **Ctrl** + **F**) to open the "Search" window, which appears in the top-right corner of the document area.
- Type text in the Find box, and click the cog icon to set the search criteria as needed.
  - A. Whole Words Only -- Limits the search to match only whole words. For example, if you search for the word *Read*, the word *Reader* will not be found.
  - B. Case-Sensitive -- Makes the search case-sensitive. For example, if you search for the word *text*, the words *Text* and *TEXT* will not be found.
  - C. Include Page Text This option is checked by default, which allows you to search the text on PDF pages. If you only want to search the text in certain elements (like bookmarks or comments), deselect it and check the corresponding option(s) in the search criteria list.
  - D. Include Bookmarks -- Enables you to search the text in bookmarks.
  - E. Include Comments -- Enables you to search the text in comments.
  - F. Highlight All Text Highlight all the text search results in the PDF file.
  - G. Properties -- Choose the color and opacity for highlighting the search results.
- Press Enter to start searching. If you have checked the Highlight All Text option, all
  the text search results will be highlighted in the PDF file, and you can scroll through
  the document to find them easily. If you do not check that option, press Enter (or
  shortcut key F3) repeatedly to continue searching and finding the next instances of the
  search term. To find the previous or next result, click Previous/Next, or press the
  shortcut keys Shift + F3 and F3.

# **Doing Advanced Search**

Foxit PDF Reader supports the advanced search function, which enables you to do the following: search a string in a single PDF file, multiple PDF files under a specified folder, all PDF files that are opened in the application, PDFs in a PDF portfolio, or a PDF index. When the search is finished, all occurrences will be listed in a tree view, allowing you to quickly preview the contexts and jump to specific locations. You can also save the search results as a CSV or PDF file for further reference.

#### 1. Setting Search Preferences

Before doing an advanced search, you can go to **File** > **Preferences** > **Search** to specify search preferences. For more information, please refer to <u>Search Preferences</u>.

#### 2. Fast Find

Foxit PDF Reader enables the fast find feature by default to store a cache of information

from PDF files that you searched, thus making subsequent searches faster. To specify fast find settings, please do the following:

- Choose File > Preferences > Search.
- To set the maximum cache size of search information, input a desired value (any integer between 5 and 100,000) in the **Maximum Cache Size** field.
- If you want to delete all the caches of search information, click **Purge Cache Contents**.
- To disable fast search, please uncheck Enable fast find.

If fast find is enabled, the cache of search information will be generated when you perform a search. When the cache reaches the limit size you specified, the earlier cache contents will be deleted automatically. And if you execute searches in PDFs that include both index and fast find cache, index will be used as the priority for searching.

#### 3. Searching Text and Patterns

To search text you are looking for, follow the steps below:

- Click in the Search field on the title bar, and choose **Advanced Search**.
- Below "Where would you like to search?" check one of the following to define the search field.
  - A. To search the text in the current PDF document, select "In the current PDF document". This option will be grayed out if no document is open.
  - B. To search the text in all PDF documents in specific folder or disk, select **All PDF Documents in** > choose one of the disks or user-selected search paths. Foxit PDF Reader will show the path of the currently opened document for easier location.
  - C. To search the text in all the PDF documents that are currently opened in Foxit PDF Reader, select **All open PDF documents**.
  - D. To search the text in selected documents in PDF portfolio, please select **Selected PDFs in portfolio**. This option is only available when a PDF portfolio is opened.
  - E. To search text in the PDF portfolio, please select **All PDFs in portfolio**. This option is only available when a PDF portfolio is opened.
  - F. To search PDF indexes, please choose **Select Index**. This option helps you search the index of the entire set of documents quickly if your PDF document or document collections include a full-text index created by Foxit PDF Editor. If you have added indexes in Foxit PDF Reader before, you can also choose **Currently Selected Indexes** option directly to search your currently selected indexes. For more information, please refer to "<u>Searching PDF Indexes</u>".
- Select one of the following search criteria from the drop-down list under the file location box:
  - A. Match exact word or phrase: Search for instances that match the entire word or phrase (including the spaces) you specified in the text search box.

- B. Match any of the words: Search for any instances that match at least one of the words.
- C. Looks like search pattern: Search for patterns like phone number, social security number, or email address in the PDF file. This option is not available when you search PDF indexes.
- D. Match All of the words: Search for any instances that match at least one of the words, but not necessarily in the order you type the words. If the document does not contain all of the words you type, no matched results will be found. This option is available only for searching a full-text PDF index.
- For text search, input the word you would like to search in "What word or phrase would you like to search for" box. For pattern search, select the pattern you want to search from the **Select your pattern** drop-down list, and choose the specific county and region from the **Country/Region** drop-down list.
- (Optional) Check any of the following options to specify the additional search criteria, if needed.
  - a) To limit the search to match only whole words, check **Whole Words Only**. For example, if you search for the word *Read*, the word *Reader* will not be found. This criterion is only available for text search.
  - b) To make the search case-sensitive, check **Case-Sensitive**. For example, if you search for the word *text*, the words *Text* and *TEXT* will not be found. This criterion is only available for text search.
  - c) By default, Foxit PDF Reader will search the text on PDF pages. If you only want to search the text in certain elements (like bookmarks or comments), uncheck **Include Page Text**, and then select the corresponding option(s) in the search criteria list.
  - d) To search words in comments, please check **Include Comments**.
  - e) To search words in bookmarks, please check **Include Bookmarks**. This criterion is only available for text search.
  - f) To search words in attachments, please check **Include Attachments**.
  - g) To search for two or more words that are separated by no more than a specific number of words specified in <u>Search preferences</u>, please check **Proximity**. This option is available in index search when **Match of All of the words** is selected.
  - h) To find instances that contain the stem of the specified search word, please check **Stemming**. For example, if you search for "opening" with **Stemming** option checked, instances of "open", "opened", "opens", and "opening" will be found. This criterion applies to text search and index search, and is not available if either **Whole Words Only** or **Case-Sensitive** is selected.
  - i) To highlight all the text search results, please check **Highlight All Text**.
  - j) To limit search in order to match criteria such as document properties and metadata, check the option in **Use these additional criteria** group, and specify the additional criteria, including Author, Date Created, Subject, etc. These options are only available when you execute advanced text search in multiple PDF files in

a specific folder or disk.

Tip: The additional search criteria options are collapsed by default. You can click **More** to show all the options. To keep expanding and displaying the additional search criteria options all the time, please go to **File** > **Preferences** > **Search**, and check the **Always show more options in advanced search** option in the **Search** group.

- Click Search button.
- Each item listed includes a few words of context and an icon that indicates the type of occurrence. Check the search results with the following steps:
  - If necessary, click the plus sign (+) to expand the search results.
  - > (Optional) For advanced search in multiple documents or portfolios, you can select an option from the **Sort By** drop-down list near the bottom of the **Search** panel to sort the search results by date modified, filename, or location.
  - > To collapse the file path and have a quick view about the file name, check Collapse File Path option at the bottom of the Search panel.
  - Click a search result directly to view it in the PDF file.
- (Optional) Click the save button in the **Search** panel, and choose **Save results to PDF** or **Save results to CSV** to save the search results.
- (Optional) Click **New Search** button to start a new search task.

Note: For each search, layers, form fields, and digital signatures in the document will also be searched automatically. If some of the search results occurs on a hidden layer, when selecting the results in the **Search** panel you will be prompted whether to make that layer visible.

#### 4. Searching PDF Indexes

If your PDF document or document collections include a full-text index created by Foxit PDF Editor, you can improve your search efficiency by simply searching the index for target words rather than each document separately. Steps are as follows:

- Click in the Search field on the title bar, and choose **Advanced Search**.
- To search a PDF document with embedded index, please enable embed index in <a href="Indexing preferences">Indexing preferences</a>, and then follow the steps in "Searching Text and Patterns".
- To search document collections which include a full-text index, please follow the steps below:
  - From the **Where would you like to search** drop-down list, choose **Select Index** to add indexes.
  - In the pop-up **Index selection** dialog box, click **Add** to add an index. All the indexes you added will be displayed in the index list in **Index selection** dialog

box. You can select an index, and click **Info** to get its file information, or click **Remove** to remove it from the list, if necessary. Once added, the index files will be marked as checked for you to execute index search by default. Before application, review the indexes in the list, and uncheck any unnecessary ones. Upon completion, click **OK** to close the **Index selection** dialog box.

- When you have successfully added the indexes, the Currently Selected Indexes option will be selected by default. If you want to search the currently selected indexes next time, you can also choose this option from the Where would you like to search drop-down list directly.
- Follow the steps in "Searching Text and Patterns" to proceed with your search.

Tip: An index created by Foxit PDF Editor for document collections usually includes an XML file, log file, and support folder. To ensure successful search, all the index files should be available when you search an index in Foxit PDF Reader.

#### 5. Resizing Search Box

The **Search** panel is displayed on the right of the document pane. When you put the cursor along the left border of the **Search** panel, the cursor turns into . Then you can click on the left border to hide or show the **Search** panel, or drag the border to adjust its width. When your search operation completes, click the close button × to close the **Search** panel.

# **Search and Highlight**

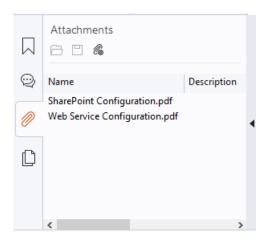
After searching, users may need to mark up the searched text strings in a highlight color. With Foxit PDF Reader's **Search & Highlight** feature, users can perform an advanced search and highlight the searched text strings with one click.

- Choose **Comment** > **Search & Highlight.** Or click in the Search field on the title bar, and choose **Search & Highlight**.
- The **Search** panel opens. Search the text strings or search by patterns as needed.
- After the search completes, you can see a Highlight icon next to the Save button in the **Search** panel, a check box in front of each searched instance and each file path, and the **Check All** option above the **New Search** button.
- Select the check box of the instance you want to highlight and click the Highlight icon

- . (**Tip**: Click the check box in front of a file path to select all instances found in the file; select the **Check All** option to select all instances found in the search.)
- (Optional) You can also change the highlight color as needed. Change the color from
  the appearance properties of the markup and set the properties as default. (For
  details, please refer to <u>Changing the Appearance of Markups</u>.) Then perform a new
  search to apply the new color to searched results.

## **Working on the Attachments**

If the PDF file contains attachments, a red solid dot will be displayed over the Attachment panel icon. In the Attachments panel, you can open, save, and edit the settings of how to open the attachments.



The Attachments Panel

#### **Opening an Attached File**

- Choose View > View Setting > Navigation Panels > Attachment or click the
   Attachments icon in the navigation pane to open the Attachments panel.
- Double-click an attachment, or select one of the attachments and click the **Open** button in the Attachments panel.
- For attachments in PDF format, Foxit PDF Reader will open them directly if the Safe Reading Mode is disabled. If you have enabled the Safe Reading Mode, a warning message will pop up. Choose an option about how to trust the document, and click Trust to continue. (Tip: If you are unsure whether the document is safe, click Not Trust to interrupt the operation and avoid potential risks.)
- For non-PDF attachments (e.g., TXT file):

- ➢ If you restrict the opening of non-PDF attachments with external applications, Foxit PDF Reader will prompt you that the file cannot be accessed due to your security settings. If you trust the document and want to open it, please change the settings in Trust Manager preferences or from the Attachment panel. For more information, please refer to "Security Settings for Non-PDF Attachments" and "Doing Security Settings".
- If you have enabled Foxit PDF Reader to open non-PDF attachments with their associated applications, choose the option about how to <a href="trust the document">trust the document</a> (if the Safe Reading Mode is enabled), and click **Trust** to continue. (**Tip**: If you are unsure whether the document is safe, click **Not Trust** to interrupt the operation and avoid potential risks.) Then select any of the following options, and click **OK** in the **Open File Attachment** dialog box.
  - A. Open this file attachment Open this file attachment, and the dialog box will always pop up every time you try to open a file attachment.
  - B. Always allow opening file attachments of this type Open this file attachment, and add the file type to the whitelist. Then the files of this type will be opened directly in the future until you change the security settings.
  - C. Never allow opening file attachments of this type Forbid to open the file attachments of this type, and add the file type to the blacklist. Whenever you try to open an attachment, the files of this type will be forbidden to open and you'll be prompted that "This file could not be accessed due to your security settings." You can follow the steps in "Doing Security Settings" to change the security settings if necessary.

#### Notes:

- 1. You can only open one attachment at a time.
- 2. For an attachment that is pinned to the PDF file as a comment, you can also open it by double-clicking the File Attachment icon on the document pane with the **Hand** command or **Select Annotation** command.

#### Saving an Attached File

- Choose View > View Setting > Navigation Panels > Attachment or click the
   Attachments icon in the navigation pane to open the Attachments panel.
- Select one of the attachments > click the **Save** button  $\square$  .
- Navigate the filename and location > click **Save**.

#### **Doing Security Settings**

To change the security settings of how to open an attachment, choose View > View

0

Setting > Navigation Panels > Attachment or click the Attachments icon

in the

navigation pane to open the Attachments panel. Click the **Settings** button in the Attachments panel and do one of the following:

- Select or deselect Allow opening of non-PDF attachments with external applications to control the permissions for opening non-PDF attachments with their associated applications. For more information, please refer to "Security Settings for Non-PDF Attachments".
- To add a non-PDF file type and configure how to open a file attachment in that format, click the **Add** button to input the file extension in the **Security Settings** dialog box, and then choose an option in the **Settings** group. For more information about the options, please refer to "Open File Attachments".
- To delete the existing security settings for a certain file type, click one of the existing file types, and click the **Delete** button.
- To change the settings of how to open the attachments of the type, choose one of the three options listed in the **Settings** group.

## Playing a Movie or a Sound Clip

PDF has extended itself to interactive multimedia support and media playing capabilities. Some PDF files may be layered with multimedia; which could include sound, music and video clips. Each movie and sound file usually includes a play area from which the media can be activated. The play area typically appears on the PDF page as an image or a blank rectangle, but can also be invisible. To play the media files, please make sure you have the necessary media player installed on your computer.

To play a movie or a sound, please do the following:

• Select the Hand command, and click the play area of the movie or sound file. When the pointer is positioned over the play area, it changes to the play mode icon.

**Note:** To protect your computer from viruses, Foxit PDF Reader will pop up a dialog box soliciting your approval before playing multimedia files.

## Thumbnails Preview in Windows

If Foxit PDF Reader is set as the default PDF viewer and previewer, all the thumbnails of PDF files will be displayed in Windows Explorer when opening a specific folder. The status bar of Foxit PDF Reader will be displayed at the bottom of the Preview pane, which provides the basic viewing commands (Go To commands and Zoom commands) for easy reading.

# **Chapter 4 - Working on PDFs**

Foxit PDF Reader allows you to copy text and images to other applications, and stamp PDFs. To learn more about this, please read the following explanations.

# **Select & Copy**

You can copy and paste text with styles, which include font, font size, font style, font color, and other text editing features.

# **Selecting and Copying Text and Images**

The Select Text and Image command lets you select horizontal and vertical text or columns of text, and images in a PDF. To select, copy and paste text or images, click the **Select Text and Image** command under the **Home** tab and do the following:

#### Selecting text and images

To select an image, please click on the image in a PDF file directly. To select text, please do any of the following:

- Select a word: Double-click the word you want to select.
- Select a line of text: Move the cursor toward a line of text you want to select.
- Select a column of text: Press the **Alt** key and the cursor changes to ... While holding the **Alt** key, click and drag the cursor over the desired column of text to select it
- Select a word: Double-click the word you want to select.
- Select multiple paragraphs through pages: Start dragging from the beginning of the selection and scroll to the end of the selection without releasing your mouse.
- Select all the text: Press Ctrl + A, or select some text, right-click it and then choose **Select All**.
- Deselect all the text: Click anywhere outside of the text selected.

**Tip**: If you right-click the selected word(s), options in the context menu allow you to perform more tasks like copying the selected text, adding text markup, looking up a word quickly on Dictionary.com online, and more.

#### Copying text and images

Once you have selected the text or image, do one of the following:

• Choose the **Copy** icon from the floating toolbar.

- Right-click the selected text > choose **Copy**.
- Right-click the selected image, and choose **Copy**.
- Press shortcut key Ctrl + C.

#### **Pasting text and images**

To paste the selected text on Clipboard to PDF file in Foxit PDF Reader, please select the Hand command in Foxit PDF Reader, use the shortcut key Ctrl + V, or right-click on the document where you want to paste the text and select **Paste**.

To paste the selected image on Clipboard to PDF file in Foxit PDF Reader, please select the Hand command in Foxit PDF Reader, use the shortcut key Ctrl + V or right-click on the document and select **Paste**. You will see the image preview as you hover your mouse over the document. Then click on the document where you want to add the image to add it in the PDF file.

To paste the selected text or image on Clipboard to another application, please follow the paste command of that specific application.

## Copying a Combination of Text and Images as an Image

You can use the SnapShot command to copy all selected content (text, images, or both) to the clipboard or other applications. Text and images will be copied as an image.

To copy a combination of text and images as a single image, do the following:

- Select the SnapShot command by choosing **Home** > **SnapShot**.
- Drag a rectangle around the text and images.
- You will be prompted that the selected area has been copied to the clipboard.
- (Optional) Right-click the selected area, and then choose **Copy Selected Graphic**.
- Paste the selected area to a PDF document as a stamp annotation with the Hand command selected.

Tip: To paste images or a combination of text and images on the clipboard from another application to a PDF file as a stamp annotation in Foxit PDF Reader, please select the Hand command in Foxit PDF Reader, use the shortcut key Ctrl + V, or right-click on the document where you want to paste the object and select **Paste**.

## **Word Count**

Similar to Microsoft Word, Foxit PDF Reader counts words, characters, pages, lines and other information in all or part of your document. With no text selected, click **View > Word Count**, and you will see a pop-up **Word Count** box for the statistics of the entire document. For a partial word count, just select the text you want to count, and then click **View > Word** 

**Count**; or right click the selected text and choose **Word Count** from the context menu.

# **Working with Layers**

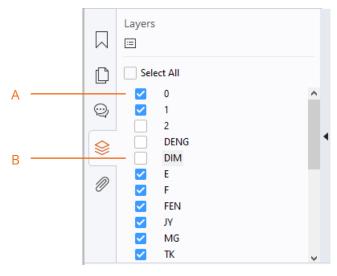
#### **About PDF Layers**

A layer or as it is more formally known Optional Content Groups (OCG) is a dictionary representing a collection of graphics that can be made visible or invisible dynamically by users of viewer applications. In a PDF file, each layer may hold any portion of the document's objects, and layers may be made visible or invisible, showing or hiding their contained objects, in any combination.

With Foxit PDF Reader, you can control the display of PDF layers with the Layer panel. For example, you may divide background imagery, main content areas, and advertisements amongst their own top-level layers, and easily hide the layers that you don't want others to view.

#### **Show or Hide PDF Layers**

In a PDF, information can be stored on different layers. To show or hide related content stored in a variable number of separate layers, you can simply refer to the Layer panel on the left side of the work area. Please note that you cannot create or edit layers in Foxit PDF Reader; however, you can view layers and choose to show or hide the content associated with each layer.



Layer Panel

- **A.** A checkmark indicates a displayed layer
- B. Hidden layer
- 1. Choose **Home** > **View Setting** > **Navigation Panels** > **Layers** (or right-click on the left

side of the navigation pane and choose **Layers** from the context menu) to open the Layer panel. And then do one of the following:

- To hide a layer, uncheck the layer. Or right-click a layer, and unselect **Show Layer** in the context menu.
- To show a hidden layer, click the empty box and a checkmark will appear. Or rightclick a layer, and select **Show Layer** in the context menu.
- To show or hide all layers, check or uncheck **Select All** directly.
- To check the properties of a layer, right-click the layer and select **Properties**.
- 2. From the **Option** menu at the top right corner of the Layer panel, choose one of the following:
  - List Layers for All Pages Shows every layer across every page of the document.
  - List Layers for Visible Pages Shows layers only on the currently visible pages.
  - Reset to Initial Visibility Resets layers to their default state.
  - Expand All Expands all layers.
  - Collapse All Collapses all of the current layers in the view.
  - Apply Print Overrides Displays layers according to the Print settings in the Layer Properties dialog box.
  - Apply Export Overrides Displays layers according to the Export settings in the Layer Properties dialog box.
  - Apply Layer Overrides Displays all layers, which is applicable to all optional content in the PDF, even layers that are not listed in the Layers panel. If you check this option, all the layers will be visible, regardless of the settings in the Layer Properties dialog box.
  - Layer Properties Displays layer properties including Layer Name, Default State,
     Initial State, etc.

# **Measuring the Objects**

The Measure commands enable you to measure distances and areas of objects in PDF documents. The measure commands are especially useful when you need to know the distances or areas associated with objects in a form or computer-aided design (CAD) drawing, or when you want to measure certain areas of a document before sending to a professional printer. The measure commands are available to users only if the PDF creator enables measuring functionality.

When you use a measure command, the command dialog box displays the measurements of the line segments you draw. If you want to set the default measurement unit, please choose **File** > **Preferences** > **Measuring** > the desired unit in the **Measurement Units** group before using any measure command.

# **Measuring the Objects**

- Choose Comment > Measure.
- Select the **Distance** command to measure the distance between two points. While measuring the distance, you can specify whether to show the default leader on both side of the measurement points or not in <u>Measuring Preferences</u>. Click the first point, move the pointer to the second point, and click again. If you choose to use the default leader, move your mouse to determine the leader length, and then click on the document again to finish measuring. The measurements will appear on the page.
- Select the **Perimeter** command to measure a set of distances between multiple points. Click the first point to start, and then click each point you want to measure. Double-click the last point to end measuring. (*Tip: When you move the cursor to a position toward the first point, a small red circle will appear at the first point, which allows you to click on the first point to end measuring and measure a closed perimeter.)*
- Select the **Area of Polygon** command to measure the area within the line segments that you draw. Click the first point to start, and then click each point you want to measure. After you have clicked at least two points, click the first point or double-click the last point to complete the area measurement.
- Select the **Area of Circle** command to measure the area of circular objects in PDF files. Click and drag to draw an oval (or use **Shift** + **drag** to draw a circle) across the object that you want to measure, and release your mouse to complete measuring.

**Notes:** When measuring with the **Distance**, **Perimeter**, or **Area of Polygon** command, you can hold down SHIFT to snap the two points horizontally, vertically, or diagonally (in 45 degrees). You can also choose to complete or cancel measurement by right-clicking and choosing options from the context menu.

By default, when you select the measuring tool, the **Format** panel appears on the right of the document pane, which allow you to calibrate the scale ratio, snap measurement, export measurement markup, etc. (Tip: The **Format** panel can be hidden by clicking on anywhere along its left border. Foxit PDF Reader will remember the display status of the **Format** panel and keep it as it is until you re-adjust it manually. To re-display the **Format** panel after it has been hidden or closed, please click on its left border again, or click the

**Display comment format panel** icon on the floating toolbar of an existing measurement markup.)

If your PDF file includes embedded scale ratio, you can measure distance/perimeter/area using the embedded scale ratio. Before that, you need to select the Use Scale and Units From Document (When present) option in File > Preferences > Measuring. Then all the following measuring will use the embedded scale ratio. To calibrate the scale ratio for your document for an accurate result, choose either method of the following:

- With the Use Scale and Units From Document (When present) option selected:
  - 1) Select the **Calibrate** button in the **Scale Ratio** group and then click the two points of the line whose actual length has already been known. (*Tips: When drawing, you can hold down SHIFT to snap the two points horizontally, vertically, or diagonally. You can also click Snap to Paths in the Snap group to capture the path in the page.)*
  - 2) When the second point is selected, the **Calibration** dialog box pops up.
  - 3) Type the actual length that the line represents and choose the appropriate unit, which will set a new scale ratio.
  - 4) (Optional) If you already have the correct scale ratio, directly define the measurement value and choose the appropriate unit in the **Scale Ratio** group.
  - 5) Then in the pop-up **Calibration** dialog box, click **Store Scale in Page** to apply the new scale ratio to the current page, or click **Apply to All Pages** to apply it to all pages (Or click the current page or in the **Scale Ratio** group to apply the new scale ratio to the current page or all pages). The new scale ratio will be embedded into the page or all pages respectively, replacing the original embedded scale ratio.
  - 6) As the scale ratio is embedded into the document, the measurements in the document change accordingly.
- With the **Use Scale and Units From Document (When present)** option unselected, directly define a custom scale ratio in the **Scale Ratio** group, or click the **Calibrate** button in the **Scale Ratio** group to define a new scale ratio. The defined scale ratio will only be applied to the current page.
- By default, the measurement results, measurement markups, and rulers will be shown in Foxit PDF Reader. To hide this information, please uncheck the relevant option(s) under the **Setting** group.
  - ➤ Show result information: shows the measurement results (including current measurement, delta values, and scale ratio) on a small panel in Foxit PDF Reader.
  - ➤ Measurement Markup: shows the line you draw as a comment. When this option is checked, you can add a label to measurement markups either by using the one specified in <a href="mailto:measuring preferences">measuring preferences</a> or inputting a new one in the **Add Label** box. The label for Distance markup will be shown in the distance measurement line, while the label for Perimeter and Area markups will be shown in their pop-up notes. When you put the pointer over the measurement markups with the Hand command selected, you can also view the measurement result and label.
  - > Rulers: shows the rulers on the page.
- Snap: While measuring objects, you can choose any of the options to snap to a

particular point along an object for more accurate measurements.

- > Snap to Endpoints : snap the measurement to the endpoint of a line.
- > Snap to Midpoints : snap the measurement to the midpoint of a line.
- Snap to Paths : snap the measurement to the nearest point on the path.
- Snap to Intersections : snap the measurement to the intersection point of two paths.
- Click the **Export to Excel** button in the **Export** group to save all the measurement information in your PDF to a CSV file.

# **Working on the Measurement Markup**

After you complete the measurement, you are able to do further operations; such as move, resize, flip, and even work on it the way you work on comments.

#### **Moving the Measurement Markup**

- With the Hand command or Select Annotation command selected, click the measurement markup you want to move.
- Place the cursor over the object when the pointer changes into , hold and drag the mouse to move it to the intended place.
- (For distance measurement markups only) To move the label as well as the measurement result shown on the distance measurement markup: click on the text shown on the markup to activate the text cursor by drag the label directly to a desired position.

## Changing the Length and Orientation of the Distance Measurement Markup

- With the Hand command or the Select Annotation command selected, select the measurement markup. Move the cursor over one of the handles (the small circles or squares) at the endpoints of the markup, you will see the pointer change into .
- Hold and drag the mouse to change the length and orientation of the distance measurement markup.

#### Flipping the Distance Measurement and the Result

Select the Hand command or Select Annotation command.

• Right-click the markup you draw > select **Flip**.

#### Adding, editing, moving, or deleting the measurement label

Measurement labels will be added and shown in the measurement markups as you specified in <u>Measuring Preferences</u> or as what you set while adding a <u>measurement markup</u>. If a measurement markup does not contain a label, you can easily add a label to it with Foxit PDF Reader. For existing labels, you can also edit, move, or delete them. Steps are as follow:

- Select the Hand command or the Select Annotation command.
- To add a label to a measurement markup without label: right-click the measurement markup > select **Add Label** > input the label > click **OK**.
- To edit an existing label: right-click the measurement markup > select Edit Label > input the label as desired > click OK.
- To delete a label: right click the measurement markup > select **Delete Label**.

# **Working on Measurement Markups as Comments**

The measurement markups can also be used as comments. You can set the status, open pop-up notes, delete them, reply to the markups, change the properties, and set the current properties as default.

**Note:** To show measurement markup and the measurement results, right-click on the object you draw, and choose **Properties** > **Appearance** > then check **Show text in line**.

For information on how to work on the objects as comments, please refer to the corresponding section of <u>"Chapter 5 – Comments"</u>.

# Change the appearance of measurement markups

Foxit PDF Reader provides multiple ways to change the appearance of measurement markups. By default, when you select a measurement markup, a toolbar will float above the measurement markup for you to quickly change the line color. You can also go to the **Format** panel and **Properties** dialog box to specify more advanced settings. If you change the appearance through the **Format** panel, Foxit PDF Reader will save the properties and apply them to any new measurement markups as well. If you change the appearance via the **Properties** dialog box and do not check **Set Current Properties as Default** option in

the dialog, Foxit PDF Reader will only apply the properties to your currently selected markup.

#### Change the appearance through the Format panel

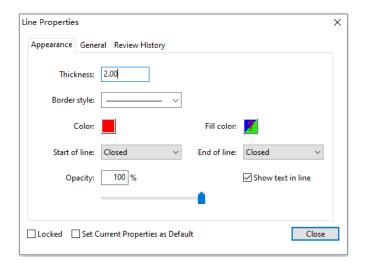
- Select the Hand command or Select Annotation command.
- Select the measurement markup that you want to change the appearance.
   Tip: By default, when you select the measurement markup, the Format panel will be displayed automatically on the right of the document pane. The Format panel can be hidden by clicking on anywhere along its left border. Foxit PDF Reader will remember the display status of Format panel and keep it as it is until you re-adjust it manually.
   To re-display the Format panel after it has been hidden or closed, please click on its

left border again, or click the **Display comment format panel** icon on the floating toolbar of an existing measurement markup.

- Do any of the following as needed in the **Format** panel. You can preview the measurement markup instantly in the **Preview** box while changing its appearance.
  - > Change the line color: Select one of the preset colors in the **Shape Style** group, or click to modify the preset style or customize a new style.
  - > Change the opacity: Drag the **Opacity** slider to change the opacity.
  - > Set the fill color: Click the **Fill Color** button , then choose a desired color from the color palette.
  - $\succ$  Change the line width: In the **Line Width** field = 1.00, input a value in the box, or select a desired value from the drop-down list.
  - > Change the dash type: Click the **Dash Type** button , and then select a dash type as needed.
  - ➤ Change the shape for the start/end of the line: Select a desired shape in the **Start of line** or **End of line** group.

#### Change the appearance via Properties dialog box

- Select the Hand command or Select Annotation command.
- Right click the measurement markup that you want to set the appearance, and then select **Properties** from the context menu.



Follow the steps specified in <u>"Changing the Appearance of Markups"</u>.

# Arrange the measurement markups

You can arrange the measurement markups by any of the methods below.

#### Arrange the measurement markups from the floating toolbar

If you have checked the "Show floating toolbar when comments are created or selected" option in <u>Commenting preference</u>, you will find a toolbar with Arrange/Alignment/Distribute buttons floating around the markups when you select two or more measurement markups. Click the corresponding buttons directly to arrange, align, or distribute the selected measurement markups. For more information about the buttons, please refer to "<u>Arrange the measurement markups through the **Format** panel</u>".

#### Arrange the measurement markups through the Format panel

- Select the Hand command or Select Annotation command.
- Select the measurement markup that you want to arrange.
  - Tip: By default, when you select the measurement markup, the **Format** panel will be displayed automatically on the right of the document pane. The **Format** panel can be hidden by clicking anywhere along its left border. Foxit PDF Reader will remember the display status of **Format** panel and keep it as it is until you re-adjust it manually. To re-display the **Format** panel after it has been hidden or closed, please click on its left

border again, or click the **Display comment format panel** icon on the floating toolbar of an existing measurement markup.

- To center the measurement markups:
  - > Select the measurement markup to be centered.
  - > (If needed) Press Ctrl (or Shift) and click the measurement markups to select multiple

measurement markups.

- > Click the **Vertically** icon , **Horizontally** icon , or **Both** icon in the **Arrange** group to center the objects vertically, horizontally, or both on the page.
- To align the measurement markups:
  - > Select two or more measurement markups that you want to align.
  - > Click the **Left** icon , **Right** icon , or **Vertically** icon in the **Alignment** group to align a column of measurement markups.
  - > Click the **Top** icon | Bottom icon | , or **Horizontally** icon in the **Alignment** group to align a row of measurement markups.

**Note**: When you select the measurement markups, the solid border handles will show up for the anchor markup, which is the last measurement markup you selected. The selected measurement markups will be lined up with the edges of the anchor measurement markup.

- To distribute the measurement markups:
  - > Select three or more measurement markups you want to distribute.
  - > Click the **Vertically** icon or **Horizontally** icon in the **Distribute** group.

#### Arrange the measurement markups via the context menu

- Select the Hand command or Select Annotation command.
- Right click the measurement markups, and then do one of the following:
  - Choose Align > Left/Right/Vertically to align a column of measurement markups, or Align > Top/Bottom/Horizontally to align a row of measurement markups. The Align options are available when you select two or more objects.
  - ➤ Choose **Center** > **Vertically/Horizontally/Both** to center the measurement markup(s) on a page.
  - > Choose **Distribute** > **Vertically/Horizontally** to distribute them. This function is available when you select three or more objects.

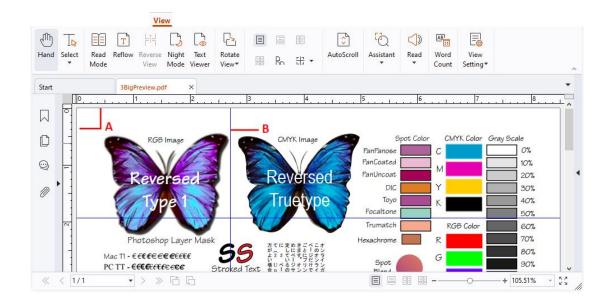
**Note**: When you right click one of the selected measurement markups, the solid border handles will show up, indicating that it is the anchor markup. The selected measurement markups will be lined up with the edges of the anchor measurement markup.

# **Switching between Basic Commands**

The Foxit PDF Reader Basic Toolbar consists of the Search, Hand, Select Text and Image, Snapshot, Typewriter, and other editing commands. You can switch between these basic modes by choosing commands on the tab bar or clicking the individual icons on the toolbar. Only one mode can be chosen each time, and they cannot be used simultaneously.

# **Using Rulers & Guides**

Foxit PDF Reader provides horizontal and vertical ruler guides to help you align and position text, graphics, or other objects on the page. They can also be used to check the size and the margins in a document.



**Rulers & Guides** 

A. Rulers B. Guides

# **Displaying Rulers**

Please choose View > View Setting > Page Display > check Rulers.

# **Hiding Rulers**

Please choose **View > View Setting > Page Display >** uncheck **Rulers**; or right-click the horizontal or vertical ruler, and then choose **Hide Rulers**.

## **Creating Ruler Guides**

Do one of the following:

- Drag down from the horizontal ruler to create a horizontal guide, or drag to the right of the vertical ruler to create a vertical guide.
- Double-click a location on the horizontal ruler to create a vertical guide, or doubleclick a location on the vertical ruler to create a horizontal guide.

# **Moving Ruler Guides**

Click and hold the guide, and then drag it to a new location.

## **Changing Unit of Measurement**

Right-click the horizontal or vertical ruler and select a measurement system for the rulers.

# **Deleting Ruler Guides**

- To delete a guide, click the guide to select it, and then press the **Delete** key.
- To delete all guides on a certain page, scroll to the page, right-click in the ruler area and choose **Clear Guides on Page**.
- To delete all guides, right-click in the ruler area and choose **Clear All Guides**.

# **Undoing and Redoing**

Foxit PDF Reader allows you to undo and redo previous actions. These features allow you to easily correct mistakes by cancelling the last action made or filling back in the previous actions with Undo. You can undo as well as redo any editing applied in the PDF documents, which includes commenting, advanced editing, and changes made to the document.

#### To undo previous actions, do one of the following:

- Select the **Undo** button on the Toolbar.
- Press shortcut key Ctrl + Z.

#### To redo previous actions, do one of the following:

- Select the **Redo** button <sup>C</sup> on the Toolbar.
- Press shortcut key Ctrl + Y.

# **Sharing Documents**

## **E-mailing Documents**

E-mailing and sharing documents is a common business practice. Foxit PDF Reader allows users to collaborate (through powerful annotation capabilities) and share PDF documents with co-works and friends. You may save and e-mail straight from the application. To e-mail a PDF file, please do the followings:

- Choose **Share** > **Email** > **Email Current Tab** or **File** > **Share** > **Email** group > **Email** (or click the **Email Current Tab** icon on the Quick Access Toolbar) to email the PDF file that you are currently reading. Or choose **Share** > **Email** > **Email All Open Tabs** to email all the PDF files that have been opened in Foxit PDF Reader.
- System default e-mail application runs.
- The PDF(s) will be attached in the e-mail automatically, and the current PDF file name will be the email subject.
- Type the subject and e-mail address > click **Send**.

By default, while emailing PDF files, Foxit PDF Reader will automatically save the changes you made to the file and attach the modified PDF file to your email system. You can change this default setting and choose to email an unsaved or saved file.

To change the default email setting, please go to **File > Preferences > Documents**, and uncheck the **Automatically save document as e-mail attachment** option under **Prompt Messages**.

#### **Preview in the Outlook**

Foxit PDF Reader enables you to preview a PDF attachment in Outlook. When an e-mail in Outlook has a PDF document, it will be displayed in the e-mail pane. The status bar of Foxit PDF Reader will be displayed at the bottom of the e-mail pane, which provides the basic viewing commands for easy reading; this includes Go To commands, Zoom commands and the Rotate command.

# **Sending Documents to Evernote**

Directly send PDF documents to Evernote as an attachment.

 Prerequisites – You will need to have an Evernote account and install Evernote on your computer.

- Open a PDF file to edit.
- Choose Share > Evernote.
- If you haven't sign in to Evernote on the client-side, input the account credential to log
  in. When you successfully log in to Evernote, the PDF document will be sent to
  Evernote automatically, and you will get a message from Evernote when the import
  completes.

# **Sending Documents to OneNote**

You can send your PDF document to OneNote quickly within Foxit PDF Reader after edits.

- Open and edit the document with Foxit PDF Reader.
- Save the changes and then click Share > OneNote.
- Select a section/page in your notebooks, and click **OK**.
- In the pop-up dialog box, choose **Attach File** or **Insert Printout** to insert your document to the selected section/page in OneNote.

# **SharePoint Integration**

Foxit PDF Reader is integrated with Microsoft SharePoint, which helps you better manage and share PDFs. You can access PDFs in a SharePoint repository by doing any of the following:

- Open a PDF file in the SharePoint mapped drive by the **Open** dialog box within Foxit PDF Reader. You can open and check out a PDF, modify it; and then check in and save it to the SharePoint network drive.
- You can also use Foxit PDF Reader's Open or Save As dialog box to manage your PDFs in your SharePoint repository, depending on whether the SharePoint repository is online or on-premise. For more details, please refer to Open and Save As PDFs with Foxit PDF Reader.
- Directly check out and check in PDFs in your SharePoint repository on SharePoint onpremise) using SharePoint's web interface in a browser after configuring your server. Please double click the attached SharePoint Configuration to configure your server first. More details please refer to Open and Save As PDFs with a Browser.

#### Open and Save As PDFs with Foxit PDF Reader

#### Open PDF files in a SharePoint repository

To open PDF files in a SharePoint repository, please do the following: (Take opening PDFs in a SharePoint repository on SharePoint online for example)

- Run Foxit PDF Reader and choose File > Open > Add a place > SharePoint. In the Add dialog box, type the SharePoint URL, and input a name that you want to display the SharePoint server in Foxit PDF Reader. Then click Next to continue.
- In the pop-up dialog box, enter your account credential to sign in.
- Choose the PDF file you want to open and click **Open**.
- In the **Foxit PDF Reader** dialog box, if you choose **Check out and Open**, other users cannot edit the PDF at the same time; if you only choose **Open**, others can modify the PDF as well when you are editing. If needed, you can check **Don't ask me again** so that Foxit PDF Reader will remember your selection and save it as the default way to open a file from the SharePoint server. Once checked and applied, **Foxit PDF Reader** dialog box will not show up the next time you open a file from the SharePoint server. To change the default way, please refer to "SharePoint".
- (Optional) If you want to cancel the Check out status, please go to Share > SharePoint > Discard Check Out.
- Edit the PDF according to your requirements.
- To check and set the PDF properties, please do as the following steps:
  - 1. Please go to **Share > SharePoint > Document Properties**.
  - 2. In the **Document Properties** dialogue, you will find the file path and document properties. You can select the file path to copy and paste it, if necessary. To edit a document property, double-click the column name, and edit the value in the Edit text box. For example, double-click **Title**, the Edit text box will pop up, type the content you want and click **OK** to finish the editing.
- Go to Share > SharePoint > Check In.

In the Check In dialogue box, select a version number for the modified document along with the appropriate version comments. To not allow other people to modify the document, you can check **Keep the document checked out after checking in this version**.

• Click **OK**, the modified PDF will be loaded to the server automatically.

#### Save as PDF files to a SharePoint repository

To save as PDF files to a SharePoint repository, please do the following: (Take saving as PDFs to a SharePoint repository on SharePoint online for example)

- Choose one of the following methods:
  - To save a PDF file as a copy in a SharePoint server that has been added in Foxit PDF Reader, choose File > Save As > SharePoint server that you have added > Browse.
  - ➤ If you haven't added the SharePoint server in Foxit PDF Reader or want to save a PDF file as a copy in a new SharePoint server, choose File > Save As > Add a place > SharePoint. And then follow the steps in "Add a SharePoint Server" to add the

server.

- In the **Save As** dialog box, specify the destination folder and file name, and click **Save**.
- Specify the document type (if applicable) and document properties, and click **Continue** to save the PDF file.

## Open and Save As PDFs with a Browser

To work on PDFs in your SharePoint repository on SharePoint on-premise with a browser, you just need to log on to your SharePoint web portal, navigate to a PDF and click it. You will be prompted whether to check out and open the PDF. See also <a href="Check Out and Open">Check Out and Open</a>. Then you can check in to save it back to your SharePoint repository.

**Tip:** If you need to save to your local folder, after editing the PDF, you can click **File** > **Save As** > **Computer** and choose a local foder to save.

## **Alfresco Integration**

Alfresco is a popular ECM (Enterprise Content Management) platform, providing robust document management capabilities. Foxit PDF Reader users can seamlessly connect to their Alfresco accounts to open, edit and save PDF documents.

#### Open and save documents in Alfresco

- Run Foxit PDF Reader and choose File > Open > Add a place > Alfresco. In the Alfresco
   Login dialog box, sign in to your Alfresco account.
- In the **Open** dialog box, select a document from a repository.
- Click **Open** or **Check Out and Open** to open the document. If you choose **Check out and Open**, other users cannot edit the PDF at the same time; if you only choose **Open**, others are able to modify the PDF at the same time when you are editing.
- When you open a document, the Alfresco context tab appears on the ribbon. You can click Check Out to check out the open document, or click Discard Checkout to cancel the Check Out status. If you check out the document, after editing it, you can click File > Save to save the changes to your Alfresco account, or click Check In to save the document as a new version back to your Alfresco account.
- If opening a document without checking out, you are allowed to modify the description of the document in the Document Properties dialog box which pops up when you click **Document Properties** in the **Alfresco** context tab.

## **Epona DMSforLegal Integration**

Within Foxit PDF Reader, you can open, modify, and save PDF documents on Epona DMSforLegal.

## **Open PDFs on Epona DMSforLegal**

- 1. Click **File** > **Open** > **Add a place** > **DMSforLegal**. Before using Foxit PDF Reader to open PDFs on Epona DMSforLegal, you are required to install Epona DMSforLegal client in your system if you haven't.
- (Optional) If you have added Epona DMSforLegal in Foxit PDF Reader before, the DMSforLegal item will be listed under the Open menu, and the DMSforLegal context tab will be displayed. You can click File > Open > DMSforLegal > Open to open a file from Epona DMSforLegal.
- 3. In the **DMSforLegal Open** dialog box, select the document you want to open, and click **OK**.
- 4. Choose how you want to open the PDF document:
  - Check Out and Open: Open the PDF file and check it out so that others cannot modify the PDF when you are working on it.
  - Open: Open the PDF file without checking out.
  - (Optional) If necessary, check **Don't ask me again** so that Foxit PDF Reader will remember your selection and save it as the default way to open a file from the Epona DMSforLegal. Once checked and applied, **Foxit PDF Reader** dialog box will not show up the next time you open a file from the Epona DMSforLegal.

# Check In, Check Out, and Discard Check Out a PDF File on Epona DMSforLegal

To change the status of a PDF file opened from Epona DMSforLegal, please select the **DMSforLegal** context tab, and choose any of the following option as desired:

- Check In: Check in the PDF document that you have currently checked out, and save it
  on Epona DMSforLegal. While checking in the PDF document, select a version number
  for the modified document and type the appropriate version comment in the Check In
  dialog box. To prevent other users from modifying the document, check Keep the
  document checked out after checking in this version option in the Check In dialog
  box.
- Check Out: Check out the PDF document from Epona DMSforLegal library. A checkedout PDF document cannot be edited by other users.
- Discard Check Out: Check in the PDF document that you have currently checked out, discarding any changes you have made to the document.

## **Check and Edit the Document Properties**

To check the document properties of a PDF file opened from Epona DMSforLegal, go to **DMSforLegal** context menu, and choose **Document Properties**. The **Document properties** dialog box will pop up for you to view and edit the document properties.

## Save a PDF File on Epona DMSforLegal

- Click **File** > **Save** to save and replace the original document on Epona DMSforLegal.
- Go to **File** > **Save As** > **DMSforLegal** > **Save As**, and follow the DMSforLegal onscreen instructions to save it as a new document on DMSforLegal.

# **Signing PDFs**

Foxit PDF Reader provides robust, secure and quick signature features, including legally-binding eSignatures, ink signatures, digital signature, and DocuSign.

# Foxit eSign

Foxit PDF Reader integrates with Foxit eSign, a legally-binding electronic signature service. With a licensed account, you can perform an eSign workflow not only on the Foxit eSign website using a web browser but also within Foxit PDF Reader directly, which allows you to edit your documents and collect signatures with complete ease.

With Foxit eSign in Foxit PDF Reader, after logging in with a licensed account, you can create your own signatures and electronically sign documents by placing the signatures on PDF pages, which is as easy as signing a paper document with a pen. You can also quickly initiate an eSign process to collect signatures from multiple people.

When you electronically sign a PDF within Foxit PDF Reader, the appearance of an applied signature/initials may include information like Signer ID and the date/time when you signed, depending on the settings for your Foxit eSign account. In your Foxit eSign account, you can use a set number of envelopes based on your license plan, and one envelope will be used when you electronically sign a PDF within Foxit PDF Reader. For more information about envelopes and Foxit eSign, you can refer to Foxit eSign Knowledge Base.

## Create your own signatures and sign a PDF

- 1. Open the document you want to sign.
- 2. (Optional) Use the tools in the Foxit eSign tab to add text or symbols to fill your PDF

as needed.

- 3. Click the 

  sign on the signature palette (or click 

  on the lower right corner of the signature palette and choose Create Signature) in the Foxit eSign tab to create a signature (Full Name) and the corresponding initials. Or you can click Manage Signatures in the Foxit eSign tab and click Add in the pop-up Manage Signatures dialog box to create signatures. (Note: The 

  sign is displayed when there aren't any signatures created yet or when there aren't any initials created for the corresponding signature.)
- 4. In the **Create Signature** dialog box:
  - Draw a signature, import a file, copy a snapshot from the clipboard, or type text content to create signatures. When you create a signature by typing text or drawing, you can change the text style or color of your signature through the <Font Style> drop-down list or Switch color palette. (*Tip*: You can sign your signature on a clean white sheet of paper using a black pen, and scan it to an image file. To create the best signature, it is suggested to scan your signature in monochrome at 600 DPI.)
  - Click Online > Download Signature/Download Initials to open the Online Signature dialog box, which shows the signatures you have previously saved online. Then select and download the desired signatures as the signature/initials.
     You can also delete signatures in the dialog box by clicking Delete.
- 5. Click the **Options** button to select the options as needed:
  - **Convert signature to black & white**: the signature will be created in black and white even if the original image is chromatic.
  - **Keep original size**: selects the option and the signature will be created with the original size. If the signature width/height is greater than the page size, Foxit PDF Reader will zoom it out to a signature with a width of 100 pixels while maintaining the original proportion. The option is only available when the signature is from an imported file or Clipboard. With the option unselected, the signature will be resized and created with a width of 100 pixels while maintaining the original proportion by default.
  - **Discard the signature when program closes**: the signature will be discarded the next time you launch Foxit PDF Reader.
  - **Require password to use this signature**: Specify a password that will be required when users sign the document with the signature. Enter the password again to confirm it.
- 6. Click **OK**.
- 7. Select your created signature on the signature palette, and then the cursor will be changed into a shape with the appearance preview of the signature.
- 8. Place the cursor to the position you want to sign and click. Or drag a rectangle to define the size and placement. The signature stays selected until you choose another tool. You can place multiple signatures on pages continuously without the need to reselect the same signature.

- 9. Click the signature with the Hand command, and it will be highlighted with a red rectangle. After adding the signature, do any of the following, if necessary.
  - To resize the signature, drag the small blue square on the lower right corner of the rectangle. After resizing the signature, you can right-click the signature and choose **Set Current Size as Default** to set the size as default so that Foxit PDF Reader will remember and apply the same size when you add the same signature in the future.
  - To move the signature, drag the rectangle directly to the desired place.
  - Before applying the signature, you can right-click the signature and choose relevant options from the context menu to copy, cut, paste, or delete the signature.
- 10. (Optional) Right-click the signature you added, and select **Place on Multiple Pages** from the context menu to place the signature to multiple pages.
- 11. Click **Apply All Signatures** on the ribbon to apply all signatures in the document.

#### Notes:

- 1. When you have placed signatures/initials that are from the same group of signatures on pages, you need to apply those signatures/initials first if you want to place signatures from another group.
- 2. Once applied, the signatures/initials can no longer be edited or deleted.

### **Manage signatures**

- 1. Click **Manage Signatures** in the **Foxit eSign** tab.
- 2. In the **Manage Signatures** dialog box, do any of the following:
  - Click **Add** to create signatures and initials.
  - Click the **Edit**  $\square$  or **Delete**  $\square$  icon to edit or delete existing signatures.
  - Click the **Upload** icon to upload the signature to Foxit eSign server. Please note that Foxit eSign server only saves one group of signatures (full name and initials). If you upload multiple groups of signatures, the latest group will be kept on Foxit eSign server.

**Note**: If you upload a group of signatures to Foxit eSign server through the **Manage Signatures** dialog box, the signature/initials saved in your profile in the Foxit eSign website will automatically be changed to the default signatures you set. However, if you make changes to the signature/initials in your profile on the Foxit eSign webpage, the changes will not be synchronized automatically to Foxit eSign in Foxit PDF Reader, and you can download the modified signature/initials through the **Online Signature** dialog box if needed.

### Initiate an eSign process in Foxit PDF Reader

To send your documents for eSignatures within Foxit PDF Reader, do the following to initiate an eSign process:

- 1. Open the document you want to send for eSignatures.
- 2. After logging in to your Foxit eSign account, click **Request Signature** in the **Foxit eSign** tab.
- 3. A file tab named "Request Signature" is opened in the application window. The current document has been uploaded to the Foxit eSign server and listed in the "Request Signature" file tab. Together with the document, you can add more documents to send for eSignatures.
- 4. Add signers.
- 5. Add the fields to the documents for signers to fill in, and assign the properties to the fields as required.
- 6. Enter the email subject and messages and then send the envelope to the recipients.
- 7. (Optional) You can view all envelopes you have sent in the "Document Status" file tab, which appears when you click **Document Status** in the **Foxit eSign** tab.

The process to request eSignatures in Foxit PDF Reader is the same as in the Foxit eSign website, and you can refer to <u>Foxit eSign Knowledge Base</u> for detailed instructions.

In the **Foxit eSign** tab, you can perform additional tasks using the **Send in Bulk**, **Create Online Form**, and **Add E-Sign Branding** commands. Clicking on any of these commands will take you to the Foxit eSign website to perform the corresponding actions (available in Foxit eSign Pro and Enterprise). For more information on the commands, please refer to <u>Foxit eSign Knowledge Base</u>.

- **Send in Bulk**: Send a single document or envelope to a large number of recipients with just a few clicks.
- **Create Online Form**: Create a web form that can be used to collect mass signatures through a link.
- **Add E-Sign Branding**: Customize your company's logo and theme color. This branding will appear on all outgoing emails, Signature Certificates, the Online Form Success Page, and throughout the User Interface in the top left of every page.

# **Quick PDF Sign**

Quick PDF Sign enables you to create your self-signed signatures (ink signatures) and add the signature to the page directly. You don't need to create different signatures for different roles.

To create your own handwritten signature and sign a PDF, follow these steps.

- 1. Choose **Home/Protect** > **Fill & Sign**. And the **Fill & Sign** context tab appears on the ribbon.
- 2. (Optional) Use the tools in the **Fill & Sign** context tab to add text or symbols to fill your PDF as needed.
- 3. Click in the signature palette on the ribbon or click on the lower right corner of the signature palette and choose **Create Signature** from the drop-down menu. Or you can click **Manage Signatures** in the **Fill & Sign** context tab and click **Add** in the pop-up **Manage Signatures** dialog box to create signatures.
- 4. In the **Create Signature** dialog box, you can draw a signature, import a file, copy from the clipboard, or type text content to create a signature. Or, click **Online** to choose a signature from the online signatures you saved before. When you create a signature by typing text or drawing, you can change the text style or color of your signature through the **<Font Style>** drop-down list or **Switch color** palette.

**TIP**: You can sign your signature on a clean white sheet of paper using a black pen, and scan it to an image file. To create the best signature, it is suggested to scan your signature in monochrome at 600 DPI.

- 5. Click **Options** to specify how to create and use the signature. For the options regarding how to create the signature and whether to discard the signature when the application closes, Foxit PDF Reader will remember your last selections as the default settings. See also "Options" in Foxit eSign.
- 6. Click **OK**.
- 7. Select your created signature on the signature palette, and then the cursor will be changed into a shape with the appearance preview of the signature.
- 8. (Optional) Select (or enable) **Keep Tool Selected** on the ribbon so that you can add the same signature continuously without reselecting the same signature.
- 9. Place the signature on the document, and adjust its size or position if necessary. See also "Add Signatures" and "Adjust Signatures" in Foxit eSign.
- 10. Right-click the signature you added, and select **Place on Multiple Pages** from the context menu to place the signature to multiple pages.
- 11. You can do one of the following to apply signatures to the document as required:
  - To apply the current signature to the document, right-click the signature, and select **Apply Signature** from the context menu.
  - To apply all signatures in the document, click Apply All Signatures on the ribbon.
- 12. Upon completion, click **Close** to close the **Fill & Sign** context tab.

**Note**: Once applied, the signature can no longer be edited or deleted.

To manage the created signatures, do the following:

- 1. Click Manage Signatures in the Fill & Sign context tab.
- 2. In the Manage Signatures dialog box, do any of the following:
  - Click **Add** to create signatures.
  - Click the **Edit**  $\square$  or **Delete**  $\square$  icon to edit or delete existing signatures.
  - Select a signature and click Move up or Move down to adjust its display order in the signature palette under the Fill & Sign context tab.
  - Select a signature and click **Save online** to save it to Foxit Web Service. The signatures saved in Foxit Web Service can be downloaded to sign PDF files from within Foxit PDF Reader or Foxit PDF Editor in Windows and Mac.
- 3. Upon completion, click **Close** to close the **Fill & Sign** context tab.

## **Digital Signature**

A digital signature acts as a traditional handwritten signature that can be used to authenticate the identity of a user as well as the document content. It stores information about the signer along with the date, time, and state of the document when it was signed.

### **About Digital ID**

Digital ID is the identity of a person/organization, which contains your name, Email address, a serial number, an expiration date, and the name of the company. A digital ID contains two keys, one is a public key (certificate) that is used to encrypt or lock data, and the other is a private key that is used to decrypt or unlock data that is encrypted.

You can distribute the certificate that contains the public key and other identifying information to those people who need to use it to verify your identity, validate your signature, or encrypt a document for you. Only your private key can unlock information that was encrypted using your certificate, so make sure to store your digital ID in a safe place.

You can not only obtain a digital ID from a trusted third-party provider called a Certificate Authority (CA) but also create a self-signed digital ID with Foxit PDF Reader. Digital IDs are usually protected by password; you can store it on a computer in PKCS#12 file format, or in the Windows Certificate Store. All the digital IDs available on the computer are listed in the Digital IDs window. You can choose **Protect** > **Sign & Certify** > **Digital IDs** to check the digital IDs list. In the **Digital IDs** window, you can also view the certificate details, add or remove a digital ID, and export a digital ID to an FDF, PKCS, or CER file.

For company-wide deployment, IT managers can also use the SignITMgr tool to configure which digital ID file is allowed to sign PDF files by users across an organization. Steps are as follow:

- 1. Create or install the digital ID file on your computer.
- 2. Click <a href="here">here</a> to download an appropriate version of Foxit Customization Wizard. Run Foxit Customization Wizard and select the **SignITMgr** option to get the SignITMgr tool opened within Foxit Customization Wizard. Click <a href="here">here</a> for more details about the SignITMgr tool.
- 3. You will find that the digital IDs you installed in your computer are listed in the window. Then do the following:
  - ♦ Check the digital ID file that is allowed to sign a PDF file, click the **Save** icon on the menu bar and save the file.
  - ❖ If you want to change the setting which you have configured before, click the **Open** icon on the menu bar to open the configuration file. Then check the digital ID file that is allowed to sign a PDF file, and click the **Save** icon on the menu bar to generate and save the modified configuration file.
- 4. After generating the configuration file, place it in "C:\Users\USERNAME\AppData\Roaming\Foxit Software\Foxit PDF Reader\Signature".

When IT manager has configured it completely, users can only use the specified digital ID(s) to sign PDF files, and will not be allowed to create a new ID.

Tip: The "Signature" folder is automatically created the first time users sign a PDF file with a digital ID. If it is not found in the specified folder, please create it manually.

### Place a signature

Before you sign a document, you need to draw a signature field where the signature is placed, get a digital ID, and create the signature.

- 1. Choose Protect > Sign & Certify > Place Signature.
- 2. Press and hold the mouse button down, and then drag the cursor to draw a signature.
- 3. In the **Sign Document** dialog box, choose a digital ID from a drop-down menu. If you can't find the specified digital ID, you will need to get a certificate from the third-party provider or create a customized digital ID.
- 4. (Optional)To create a customized digital ID, choose New ID from drop-down menu. In the Add Digital ID dialog box, choose A new digital ID I want to create now, and click Next. In the next step, select the location to store the digital ID file. Click Next to type your identity information such as name, organization unit, e-mail address, etc. to be used when generating the self-signed certificate. In Use Digital ID for, choose one option as needed. Click Next to specify the storage location and password for your new digital ID file. Confirm your password and click Finish. The New ID option will not be available if the IT manager has configured and restricted digital IDs to sign PDF files across the company.
- 5. For Appearance Type, choose a style from the drop-down list, or click the **Create** button to create a new style for your signature appearance. The created styles will be added to the drop-down list for Appearance Type. Please refer to <u>Creating signature</u>

<u>appearance</u>. You can preview your signature in **Signature Preview** box.

- 6. Under **Text For Signing**, input text in the field and select an option from the drop-down list to specify your location and reason to sign the document. Please note that **Location** and **Reason** fields are available only when the signature is defined to include the corresponding option in its appearance type. For the **Reason** field, Foxit PDF Reader will save your custom reasons for you to choose from the drop-down list easily in future uses.
- 7. (Optional) To add the digital signature at the same position on multiple pages of the currently opened PDF file, specify the page range in the Page Range group. You can also choose Even pages only or Odd pages only from the Subset drop-down list to apply the digital signature at the same position on the even pages or odd pages in the specified range.
- 8. If you want to lock the document to prevent further editing, check the **Lock Document After Signing** option.
- 9. Do any of the following to sign PDF files:
  - To sign the currently opened PDF file, click **Sign**, and then specify the location and file name to save the signed document.
  - To sign multiple PDF files, click **Apply to Multiple Files**. In the pop-up **Sign Multiple Documents** dialog box, do the following:
    - Click Add files, and choose Add Files, Add Folder, or Add Open Files to add files, folders or opened files that you want to sign with the same digital signature.
    - ♦ By default, the document will be signed in a sequence as they are ordered in the **Sign Multiple Documents** dialog box. You can adjust the order of files by its name, modified time, or size by clicking the corresponding column name. Alternatively, drag and drop the file in the list to adjust its order. Select a file and click the **Remove** button to delete it, if necessary.
    - ♦ Click **Output Options** to specify the output folder and file name for the signed PDF document.
    - Click **Sign Immediately**. And then Foxit PDF Reader will sign your PDF documents with the same digital signature at the same location as your current document, and saved the signed documents in the folder you specified.

**Note:** When you choose a password protected digital ID to sign PDF files, you will be required to input the password when applying the signature. By default, an opened document will be signed immediately after you place the signature and then you will not be able to move or resize it. To change the setting, please uncheck the **Sign the document immediately after the signature is placed** option in **File** > **Preferences** > **Signature**.

### **Create signature appearance**

You can set the appearance of your digital signature by selecting different options in **Configure Signature Style** dialog box. For example, a signature can include an image of your handwritten signature, a company logo, or a photo, date, reasons for signing, and so on.

- 1. Choose **Protect** > **Sign & Certify** > **Place Signature**.
- 2. Press and hold the mouse button down, and drag to draw a signature filed for your signature.
- 3. In **Sign Document** dialog box, click the **Create** button to create a new style for your signature appearance.
- 4. In the upper part of the **Configure Signature Style** dialog box, you can configure the graphic for your signature. You can choose to use no graphic, your handwritten signature, your name, or an image from a file.
  - ➤ Name: This tab is displayed by default. If you choose this option, the certificate name that is defined when you create the self-signed digital ID will be shown in the digital signature.
  - Draw: This tab allows you to draw your handwritten signature. When you switch to the Draw tab from any other tabs, the Draw Signature window will pop up automatically. Draw your signature on the pop-up window, and click OK to save your handwritten signature or click Clear to discard it. While in the Draw tab, you can also click Draw Signature to redisplay the Draw Signature window and draw a new signature.
  - ➤ **Image**: Import a file from your local disk as an image. Click **Browse** to select the file. After importing the image, you can click **Opacity** to change the opacity. If you need to delete the imported image, click **Clear**.
  - ➤ **None**: Do not use any image, and only display the information specified in the **Configure Text** and **Configure Logo** groups.
- 5. Check the options that you want to appear in the digital signature in the **Configure Text** group. A signature appearance can include lots of information showing the user's attributes, including name, reason, location, etc.
- 6. (Optional) In the **Text Property** group, specify the text direction, font, and size for the text information shown in the digital signature.
  - Note: **Text Direction** options apply to both your common name and configured text (i.e. the information specified in the **Configure Text** group). You can use different fonts and sizes for your common name and configured text by selecting the desired options in the **Common Name** and **Configure Text** group in the **Font/Size** dialog box.
- 7. By default, Foxit PDF Editor logo will be shown on your digital signature. If you want to change that logo, click **Browse** in the **Configure Logo** group to select a desired one.
- 8. In the **Title** box, input a title for the signature appearance. When you sign a PDF file, you can find the signature by the title in the **Appearance Type** drop-down list. If you do not specify the title, Foxit PDF Reader will use "Created <date and time the

signature was created>" as the title instead.

- 9. Click **OK** to close the **Configure Signature Style** dialog box.
- 10. Follow the steps in "Place a signature" to sign PDF files.

**Note:** To manage the created styles, go to **File** > **Preferences** > **Signature**.

### Sign a PDF

A PDF is signed to indicate your approval. The signature isn't resized and moved when you sign the document. Multiple people can sign a PDF more than once. When you sign a document, your digital signature appears in the signature field. The appearance of the signature depends on your preferences.

By default, the document is signed immediately after you place the signature. After placing the signature, you will be prompted to save the signed document. Specify the file name and location in the pop-up **Save As** dialog box to save the document.

If you want to change the default setting to sign documents later, please uncheck the **Sign the document immediately after signature is placed** option in **File** > **Preferences** > **Signature**. After placing the signatures, follow one of the steps below to sign the document, and save it as prompted.

- Choose Protect > Sign & Certify > Sign Document.
- Select Hand command and right-click the signature, choose Sign Document.
- Select Hand command, and click the signature.

Tip: If you sign a PDF file that is opened and checked out from SharePoint repository, you can skip the Save As steps as Foxit PDF Reader will automatically save it back to SharePoint.

### Add a time stamp to digital signatures and documents

Time stamps are used to specify the date and time you signed a document. A trusted time stamp proves that the contents of your PDFs existed at a point-in-time and have not changed since then. Foxit PDF Reader allows you to add a trusted time stamp to digital signatures or documents.

### To add a time stamp to digital signatures

To add a time stamp to digital signatures, a default time stamp server is required before you make the digital signature. If you have configured a default time stamp server and added it to your trusted certificate list, the time stamp will be embedded with the signature, and the signature properties will show the date/time in the time stamp server when you signed the document; otherwise, the signature properties will display the local date/time

of the computer.

- 1. Go to **File** > **Preferences** > **Time Stamp Servers**, and set a default time stamp server.
- 2. Sign the document. See also Sign a PDF.
- 3. You will be prompted with a pop-up **Security Warning** to ask you to allow connecting to your time stamp server. Click **Allow**.
- 4. Then the signature you made has been successfully embedded with a timestamp. When validating the signature, users need to add the time stamp server into the trusted certificate list so that the signature properties will display the date/time in the time stamp server when the document was signed. See also <a href="Trusted Certificates">Trusted Certificates</a>.

**Note**: By default, if only one time stamp server is available in the system, it will be set as default automatically.

### To add a time stamp to documents

- Before adding a time stamp to documents, you need to configure a default time stamp server. Click **Protect** > **Time Stamp Document** and create a timestamp server by clicking **New...** in the pop-up dialog box. Specify the server name and complete other settings of the server on demand. Click **OK**.
- 2. Select the created server and click **Set Default** to set the server as the default time stamp server. Click **Next** to continue.
- 3. (**Tip**: You can also create, edit, and delete time stamp servers as well as enable/disable the default time server in **File** > **Preferences** > **Time Stamp Servers**. To disable the default time stamp server, select the default time stamp server and click **Clear**.)
- 4. Specify a name and location for the signed document. Click **Save**.

### **Validate Signatures**

Signature validity is determined by checking the authenticity of the signature's digital ID certificate status and document integrity. Depending on how you have configured your application, validation may occur automatically.

### **Set Signature Verification Preference**

By default, Foxit PDF Reader will verify signatures when the document is opened, and will check the certificate revocation status while verifying signatures. If you want to change the setting, please go to **File** > **Preferences** > **Signature**, and click **Change Settings** in the **Signing & Verifications** group to control how and when signatures are verified. For more information, please refer to "Signature Preference".

#### Set the Trust Level of a Certificate

The signature of a certified or signed document is valid if you and the signer have a trust relationship. The trust level of the certificate indicates the actions for which you trust the signer.

To set the trust level:

- Choose File > Preferences > Signature.
- Click Change Settings in the Signing & Verifications group, and check the option(s) in Windows Integration group to trust all root certificates in the Windows Certificate Store when validating signatures and certified documents.

Tip: You can specify the trust level for a specific certificate in Foxit PDF Reader Trusted Certificates list while adding and managing the trusted certificate. Please refer to Add Trusted Certificates and Manage Trusted Certificates for more information. If you configure different settings for the same certificate, settings with higher permissions will prevail. Remember that checking trust options may compromise security. Please make sure that you trust all the root certificates before enabling the features.

### Check the validity of a signature

By default, Foxit PDF Reader verifies signatures when the document is opened. An icon appears on the left top of **Signature Validation Status** message box to indicate the signature status. The signature state appears in the Signature Panel.

- The question mark icon indicates the signature is not validated.
- The check mark icon indicates that the signature is valid.
- The icon indicates that the signature is invalid. The document has been altered or corrupted since the signature was applied.
- The caution triangle icon indicates the document was modified after signature was added; however, the signature is valid.
- The icon indicates the signature validity is unknown because the signer's certificate isn't in your list of trusted identities.

If you do not choose to verify signatures automatically when the document is opened in the <u>Signature preferences</u>, you can do any of the following to validate a signature manually:

- Choose **Protect** > **Validate**.
- Right-click the signature with Hand command, choose **Validate Signature** from context menu.
- Select Hand command on toolbar and click the signature.

When you have checked "When document has valid but untrusted signatures, prompt to review and trust signers" option in <u>Signature preferences</u> with <u>procedure-related notification message</u> enabled, a notification message will be displayed on the document pane for you to review and trust signers if the signature (not including certified signatures) in your document is verified as valid but is applied by an untrusted signer with a certificate that doesn't chain up to a trust anchor. To add the signer to your list of trusted certificates and trust all future signatures from the same signer, click **Manage Trust** on the notification message, and then choose **Trust Signer for Future Signatures** in the **Manage Signature Trust** dialog box. To manage your trusted signers in your trusted certificate list, please refer to "<u>Trusted Certificate</u>".

If you open a certified PDF file with <u>notification-related message</u> enabled, Foxit PDF Reader will display a notification message informing you that the document is certified. You can click **Signature Panel** on the notification message to check the details about the document certification and signatures in the **Digital Signatures** panel.

### Long-term signature validation

Many business or other practical applications need digitally-signed documents to be verifiable for months or years after signing. However, the signed document can be no longer verifiable if the signer's certificate has expired or been revoked, or with some other reasons. To reduce chances for error or fraud, Long Term Validation (LTV) is introduced for digital signatures in PDF, which is in compliance with <a href="Part 4">Part 4</a> of the ETSI TS 102778-4 PDF Advanced Electronic Signatures (PAdES) standard.

When LTV is enabled, the document can be validated at any time in the future. To achieve long-term validation, the following are required:

- 1. The signature is verified using the secure time provided by a timestamp or at which the signature was applied.
- 2. The signed PDF has not been altered and the certificate has not been revoked or expired.
- 3. The certificate revocation status is embedded in the signed PDF. Embedding certificate revocation information can occur when the document is signed and saved.

From the **Signature** panel, you can check whether the signature is LTV enabled or not after validation. In some cases, the certificate revocation information may not be embedded successfully in the document when you sign the document (especially when you are offline)

and you will be informed the signature is not LTV enabled. You can right-click the signature and choose **Add verification information** to add the information to the signature.

**Note**: To use secure time for verification, after clicking **Change Settings** for **Singing & Verifications** in **File** > **Preferences** > **Signature**, select the **Time at which the signature was created**, or **Secure time (timestamp) embedded in the signature** if a trusted timestamp is embedded.

#### **Check certificate revocation status**

By default, Foxit PDF Reader will check the certificate revocation status while validating a signature if the certificate used to sign a PDF file chains up to a certificate designated as a trusted anchor. Revocation checks are performed based on the revocation information embedded in the digitally signed PDF document, the digital signature, or the Certificate Revocation List (CRL). To view the certificate revocation information, please do the following:

- 1. Do one of the following:
  - Choose Protect > Sign & Certify > Trusted Certificates, and double-click the certificate.
  - In the **Digital Signatures** panel, right-click the signature, choose **Show Signature Properties**, and then click **Show Certificate**.
- 2. In the **Certificate Viewer** dialog box, click **Revocation** tab to view the revocation information, and click **Signer Details** to get more information on the source of the revocation information.
- (Optional) If you do not check Require certificate revocation checking to succeed whenever possible during signature verification option in <u>Signature preferences</u>, you can click Check Revocation in the Revocation tab to perform revocation check manually.

### **View Signed Versions of a Digitally Signed PDF**

A signed version will be automatically saved each time you sign a PDF with a digital signature. If a digitally signed document was modified, you can still view the signed version without the modification. For a document digitally signed several times, you can view each signed version without the changes made after each signature was applied. All signed versions along with their corresponding digital signatures are listed in the **Digital Signatures** panel.

To view a signed version of a digitally signed PDF, do as the following:

- 1. Open the signed document with Foxit PDF Reader.
- 2. In the **Digital Signatures** panel in the navigation pane, select and expand a signature,

- and choose **Click to view this version**. Or right-click the signature in the document pane with the Hand command and choose **View Signed Version** from the context menu.
- 3. Then this version will be opened in a new tab in the application window, with the title of "filename.pdf-Signed Version". (**Note**: If the document has not been modified since the selected signature was applied, a prompt appears saying you are already viewing the version covered by the selected signature.)
- 4. (Optional) Following each signed version in the **Digital Signatures** panel lists the changes made to the signed version. Clicking on one of the changes will jump to the related area in the document.

### **View Signature Properties**

Signature Properties dialog box provides basic information about the signature, including the signer, reason, date, location validity summary and details of certificate, etc.

- 1. Select the Hand command.
- 2. Right-click the signature, and choose **Show Signature Properties** from context menu.
- 3. In Signature Properties dialog box, you can get the information as follows:
  - **Signed by** shows the signers that sign the document.
  - **Reason** displays the reason that you create the signature.
  - **Date** shows the date time when you signed the document.
  - **Location** shows which page the signature is located on.
  - **Validity Summary** checks whether the document was modified after it was signed, and other information.
  - Show Certificate Click it to open the Certificate Viewer dialog box. Click Show
     Certificate in the Certificate Viewer dialog box to view the details of the
     signature certificate (such as the validity of certificate and certificate path) and add
     the certificate to the Trusted Certificates list. See also Add a trusted digital
     certificate to the Trust Certificates list.
  - Advanced Properties Click it to open the Advanced Signature Properties
    dialog box where you can view the details about the signature and the embedded
    time stamp (if any). For the time stamp, you can click Show Certificate... in the
    Advanced Signature Properties dialog box to add the time stamp server to the
    Trusted Certificates list. See also Add a trusted digital certificate to the Trust
    Certificates list.

**Note:** If the status is unknown, click **Show Certificate** in the **Signature Properties** dialog box, then click **Show Certificate** in the pop-up **Certificate Viewer** dialog box to view the details of the certificate. Check whether the certificate has been included in your list of trusted identities. If your certificate is not trusted, click **Install Certificate** to install it to the trusted Windows Certificate Store. If you use a self-signed digital ID, confirm that the certificate details are valid. If the certificate isn't valid, a valid certificate from signer is

requested.

### **Trusted Certificates**

You can add all your trusted time stamp servers as well as certificates that issued your digital IDs to the **Trusted Certificates** list.

To add a trusted digital certificate to the Trust Certificates list, please do the following:

- Right-click the digital signature, and choose Show Signature Properties.
- In the **Signature Properties** dialog box, click **Show Certificate**.
- In the Certificate Viewer dialog box, specify the trust level for the certificate in the
   Trust tab:
  - ♦ Use this certificate as a trusted root: Use the certificate as a trusted root, and trust all certificates issued by that certificate authority. Once you make a certificate a trust anchor, revocation checking will not be performed on it.
  - ♦ Validating Signatures or Validating Certified Documents: Trust the certificate when validating signatures or certified documents.
- Click Add to Trusted Certificates, and confirm your operation.

To add a trusted time stamp server to the Trusted Certificates list, please do either of the following:

- If a time stamp is added in the document, go to the **Digital Signatures** panel in the navigation pane, right-click the timestamp signature, and choose **Show Signature Properties**. In the pop-up **Signature Properties** dialog box, click **Show Certificate**.
   See also Add a trusted digital certificate to the Trust Certificates list.
- If a time stamp is added to a digital signature, right-click the signature field in the
  document or right-click the signature in the **Digital Signatures** panel, and choose
  Show Signature Properties from the context menu. Click Advanced Properties in
  the lower-left corner of the pop-up Signature Properties dialog box, which opens the
  Advanced Signature Properties dialog box. Then click Show Certificate. See also
  Add a trusted digital certificate to the Trust Certificates list.

To check all the trusted certificates, choose **Protect** > **Sign & Certify** > **Trusted Certificates**. In the **Trust Certificates** window, you can manage all the trusted certificates, including adding & exporting a certificate, viewing certificate details, deleting a certificate, and specifying the trust level for a certificate.

# Signing PDFs with DocuSign®

Foxit PDF Reader allows users to easily send, sign and save PDF documents and forms using the industry's most widely used eSignature solution. Before signing PDFs with

DocuSign, you need to go to **Help** > **About Foxit PDF Reader** > click **Check for Update...** in the pop-up window to download and install the DocuSign plugin. (*Tip: You can also download the plugin from the Foxit website, and then click Help > Foxit Plug-Ins > click Install Plugin in the pop-up About Foxit Plug-Ins dialog box to install it; for a plug-in in MSI format, double-click it to install it.)* 

### Signing a PDF File

To sign a PDF with DocuSign, please refer to the following steps:

- Open the PDF document you want to sign. Click the **Protect** tab, and choose **DocuSign** >
   Login to DocuSign. Type your Email and password for DocuSign and click **Login**. You
   can log in to DocuSign using your personal account or corporate SSO. If you do not
   have an account, please sign up first.
- After signing in, choose **DocuSign** > **Sign with DocuSign**. The application will upload your PDF to DocuSign and you will enter into the DocuSign user interface.
- Sign the Document

On the DocuSign user interface in the Reader window, you can do the following:

- o Sign directly by adding desired fields (including Signature, Initial, Date Signed, and more) to the document. Choose a field and the cursor changes to preview the appearance of the field. Then click on the document to place the field, or click several times to place multiple fields. Click the **Close** button at the top right corner of a field to delete it. You can resize fields such as Signature, Initial, and Text by dragging the handles of the field box that appear when you click on the field. (**Note:** You should visit the DocuSign website if you want to change the Signature and Initial appearances.)
- o By using the tools at the top of the window, you can change the zoom of the file, download the file, or print the PDF with signatures visible.
- o Click **FINISH** and a message box pops up for you to send the signed document to others.
- (Optional) Click **OTHER OPTIONS** to view history, view certificates, or choose
   **FINISH LATER** to finish the signing process later.
- To log out of DocuSign, choose **DocuSign** > **Logout of DocuSign** in the **Protect** tab.

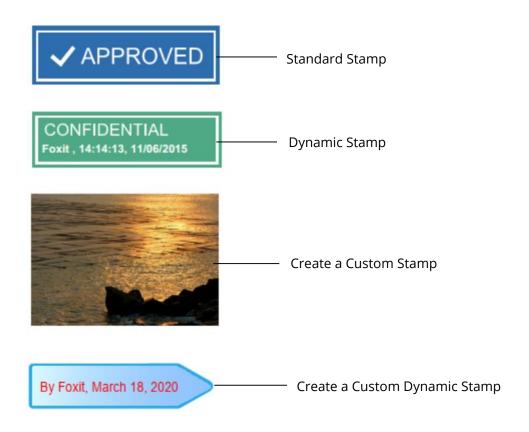
### Send a PDF via DocuSign

- Open a PDF with Foxit PDF Reader.
- Click the **Protect** tab, and choose **DocuSign** > **Send via DocuSign**.
- Log in to DocuSign.
- Add the recipients, message, and other options as needed.
- Then Click **Send** to send the PDF.

**Note:** For more details about DocuSign, please contact DocuSign support.

# **Stamping PDFs**

The Stamp commands in Foxit PDF Reader are a group of advanced tools that enable you to stamp content and watermarks into a PDF document. Foxit PDF Reader supports image stamps from your clipboard and PDF file stamps. You can either create dynamic stamps which can obtain information from your system including name, date and time, or import existing dynamic stamps. Stamping PDF files is a very useful feature especially when you need to give reviewers some advices about the document's status or sensitivity.



# **Stamping a PDF**

You can choose from a list of predefined stamps, or create custom stamps before stamping a PDF. All the stamps that you import or create are listed in the Stamps Palette. To apply a stamp, please do the following:

- 1. Choose any of the following methods to open the Stamps Palette:
  - Choose Comment > Stamp.
  - Choose Comment > Custom Stamp > Show Stamps Palette. When you choose to show the stamps palette, the stamps palette will be opened as a floating window. You can drag the border to resize the window, or move the window to

anywhere by dragging. Foxit PDF Reader will remember your adjustments to the window and show it as what you specified when you open the Stamps Palette in the future. In the **Stamps** floating window, click the drop-down list to select different stamp categories and display the stamps corresponding to the selected category.

- 2. In the Stamps Palette, select a stamp.
- 3. The cursor changes into a rectangle showing the preview of the stamp. Specify on the document page where you want to place the stamp, or drag a rectangle on the document page to define the size and placement.
- 4. To apply a stamp on multiple pages, right click the stamp and choose **Place on Multiple Pages**. In the **Place on Multiple Pages** dialog box, specify the page range and click **OK** to apply.

#### Notes:

- 1. All the stamps that you import or customize will be listed in the menu of Stamp commands, you can choose directly a stamp from the menu of Stamp commands. If you need to import Monteith stamps, please save the Monteith stamp file in "C:\Users\%user profile%\AppData\Roaming\Foxit Software\Foxit PDF Reader\Stamps\UserStamps". Before applying a Monteith stamp, you will need to set your identity information in the pop-up User Identity dialog box or in Preferences > Identity tab.
- The date format shown on the dynamic stamp is the same as that you set in your system.

# **Creating a Stamp**

You can create custom stamps and dynamic stamps.

### **Creating a Custom Stamp**

- 1. Choose Comment > Custom Stamp > Create Custom Stamp.
- 2. In the **Create Custom Stamp** dialog box, click **Browse** and choose a PDF file. If the selected file contains multiple pages, you can drag the scroll bar to select a page.
- 3. For Category, type a new category name or choose an existing category from the drop-down list, name the stamp, and then click **OK**.

### **Creating a Custom Dynamic Stamp**

You can create a Custom Dynamic Stamp to add text, author name and date time on stamps. Please do the following:

- 1. Choose Comment > Custom Stamp > Create Custom Dynamic Stamp.
- 2. In the **Create Custom Dynamic Stamp** dialog box, choose one stamp template from the left list. Choose an existing category from drop-down list or name a new one, then name the dynamic stamp.

- 3. Specify Font, Font Size and Font Color. You can drag the Stamp Size slider to change stamp size when Font Size is set as Auto.
- 4. From the Stamp Text option, please do the following:
  - ♦ Type the text that you want to show on the stamp in the **Stamp Text** field directly.
  - Choose <author name>, <date and time>, <date>, or <author name, date and time> to add current user, date, and time of your system to the stamp. Please note that the date format shown in the stamp is the same as that you set in your system. When you add the stamp text with <date and time> or <date>, Foxit PDF Reader will read the date format from your system and apply in on the stamp text you added.
  - Click <Custom values when stamp is added> to create custom dynamic stamp with custom values which invoke a prompt window for users to input information while adding a stamp in PDF file. If you select this option, define the Field Name and Example in the pop up window, and click Add to add it to the custom dynamic stamp. If you choose this option, it is recommended to set Font Size as Auto so that the custom values you added in the stamp will be adjusted automatically to adapt to your stamp field. After adding the value, you can also drag the Stamp Size slider to adjust its size, if necessary.
- 5. You can instantly adjust the added content to fit your needs when you preview current stamp on the right top preview pane.
- 6. Click **OK**.

### **Creating an Image on Clipboard as Stamp**

To create an image on clipboard as stamp, please do the following:

• Choose Comment > Custom Stamp > Paste Clipboard Image as Stamp Tool.

# **Managing a Stamp**

To manage a stamp, please do the following:

- Choose Comment > Custom Stamp > Manage Stamps to open Manage Custom
   Stamps dialog box, and select a stamp.
- Click **Create** and choose a way of creating stamp from drop-down menu, please refer to <u>Creating a custom stamp</u>.
- Click **Edit** to edit the stamps, such as changing category, stamp name, or replacing the image or PDF files. Please refer to <u>Creating a custom dynamic stamp</u>.
- Click **Delete** to remove the stamp.

**Note:** Deleting a custom stamp category will delete all stamps that are subordinate to it.

### **Cutting/Copying and Pasting a Stamp**

To cut/copy and paste a stamp, please do the following:

- Select the stamp you want to cut or copy.
- Right-click the stamp and select Cut/Copy.
- Do one of the following to paste the stamp as required:
  - > To paste the stamp at the specified location, right-click on the page you want to paste the stamp, and select **Paste**.
  - > To paste the stamp at the center of the page, press **Ctrl** + **V**.
  - > To paste the stamp at the same position on a different page, right-click anywhere on the target page, and choose **Paste in Place**.

### **Undoing/Redoing a Stamp**

To undo/redo a Stamp, please click **Undo** or **Redo** on the Quick Access Toolbar.

#### **Resizing or Moving a Stamp**

- Select the Hand command or the Select Annotation command.
- To resize a stamp, select it, and drag one of the handles to make your adjustments.
- To move a stamp, select it and put the cursor on one of the segments to drag.
- To add a pop-up note to a stamp, select it and double-click the stamp or right-click it and choose **Open Popup Note**. See also "About pop-up notes".

### **Rotating a Stamp**

- Select the Hand command or the Select Annotation command.
- Select the stamp(s) that you want to rotate, and you will find the rotation handle at the top of the selected stamp(s).
  - **Tip**: If you select multiple stamps, all the stamps will be rotated as a group at the same degrees.
- Drag the rotation handle to rotate the selected stamps at any degree. While dragging the rotation handle, you can also press **Shift** to rotate the stamps in 15-degree increments.

### **Deleting a Stamp**

Do one of the following:

- Select the Hand command or the Select Annotation command, and then press the **Delete** key.
- Select the Hand command or the Select Annotation command, right-click on the stamp, and choose **Delete** from the Context Menu.

### **Setting Favorite Stamps**

- Choose Comment > Custom Stamp > Set Favorite Stamps.
- Select a stamp in the All Stamps panel, and then click Add to Favorite, then the stamp you select will be added to the Favorite Stamps panel.
- To remove a stamp from the **Favorite Stamps** panel, select the stamp you want to remove and then click **Remove from Favorite**.

### **Enable Fast Web View in a PDF**

Fast Web View restructures a PDF file for page-at-a-time downloading from web servers. While reading an online PDF file with Fast Web View enabled, the web server will only load the requested page rather than the entire PDF to ensure fast access.

### **Verify Fast Web View Status**

You can check if an existing PDF file is enabled for Fast Web View with the following steps:

- Open the PDF file with Foxit PDF Reader.
- Choose File > Properties, and check the status in Fast Web View column under the General group.

### **Enable Fast Web View in a PDF**

To enable Fast Web View in an existing PDF file, please follow the steps below:

- Enable Fast Web View setting in Preferences with the following steps:
  - Choose File > Preferences > Documents.
  - > Check the **Save as optimizes for fast web view** option in the **Save Setting** group.
  - Click **OK** to apply the setting.
- Click **File** > **Save As** to save the PDF file as a linearized one with Fast Web View enabled.

# **Managing Security**

# **Security Settings for Non-PDF Attachments**

Your PDF files or PDF portfolios may contain non-PDF attachments or component files, such as Word, Excel, PowerPoint, or text files. Foxit PDF Reader allows you to open non-

PDF attachments and component files with the supported applications installed on your computer if you trust the documents. You can go to **File > Preferences > Trust Manager**, and specify the following options in the **PDF File Attachments** group to control the permissions for opening non-PDF attachments and component files with their associated applications.

- Allow opening of non-PDF file attachments with external applications: Specify whether to allow non-PDF attachments and component files to be opened with their associated applications. If this option is checked, Foxit PDF Reader will display dialog boxes for you to choose whether to trust the document (if the Safe Reading Mode is enabled) and how to open a document of the same type when you try to open a non-PDF attachment or component file. If you uncheck this option, your access will be denied and you will be prompted that the file cannot be accessed due to your security settings when you try to open a non-PDF attachment or component file.
- Restore the default list of allowed and disallowed file attachment types: The
  "Restore" button will be available if you have changed the default settings. Clicking the
  "Restore" button will reset the security settings for file attachments to the original state,
  including the settings you specified in the Open File Attachment dialog box,
  Attachments panel, and registry.

**Tip**: You can also specify the settings about how to open an attachment or component file of a certain type via the Attachments panel. For more information, please refer to "<u>Doing security settings</u>".

# **Safe Reading Mode**

Safe Reading Mode enables you to control unauthorized actions and data transmissions that efficiently avoid attacks from malicious content and viruses.

#### **Activate Safe Reading Mode**

To activate Safe Reading Mode, do the followings:

- Select File > Preferences > Trust Manager, and check Enable Safe Reading Mode option.
- Click **OK**.

### **Bypass Security Restrictions in Safe Reading Mode**

If you are in Safe Reading Mode, a warning dialog box will appear when a PDF tries to complete a restricted action from an untrusted location or file. However, you may need to execute certain actions under the current restricted security settings. In this case, you can select trusted files, folders, and hosts and exempt them from security restrictions. This security feature ensures that Foxit PDF Reader operates under security level conditions

that meet your working environment.

To specify the trusted files, folders, or hosts, please follow the steps below:

- a) Go to File > Preferences > Security.
- b) Click **Add File** to add trusted files to the privileged locations. Foxit PDF Reader currently allows you to add the following files: PDF Files (.pdf), Form Data Files (.fdf), XFDF Files (.xfdf), XDP Files (.xdp), and PPDF Files (.ppdf).
- c) Click **Add Folder Path** to add a trusted folder of multiple files.
- d) Click **Add Host** to add the root URL to trust the files and actions from the trusted host. You can also check **Secure connections only (https:)** to trust files and actions from secure connections only.
- e) (If needed) Click **Remove** to remove trusted items from privileged locations.
- f) Click **OK** to confirm and apply the settings.

### **On-line Whitelist Management**

Foxit PDF Reader allows users to add trusted URLs to better manage file access.

To set on-line whitelist, please follow the steps below:

Choose File > Preferences > Trust Manager > click Change Settings in the Internet Access from PDF Files outside the web browser group, then Manage Sites dialog box will pop up as shown below:



- Allow PDF files to access all web sites: Select it to allow access to all web sites.
- Block PDF file access to all web sites: Select it to restrict access to all web sites.
- Custom setting: You can customize the trusted URLs to restrict access to only the URLs

you customize.

- > Select Custom setting.
- Input the host name of a website under the **Host name** field.
- Click Allow and then click OK.

The URLs that you trusted will be added in the Web Sites List. If you want to delete the trusted URL, please select it and click **Delete**. For the URLs not included in the Web Sites List, you can check one of the following options to set the default behavior when connecting to the web sites.

- Always ask: When you try to access websites not listed as trusted, Foxit PDF Reader will always prompt you with a pop up window saying: "If you trust this site, click Yes; otherwise, click No". This is selected by default.
- Allow access: Access to all websites will be available if it is selected.
- Block access: Access to all websites will be blocked if it is selected.

### **Application Whitelist Management**

By default, Foxit PDF Reader will show a warning message when an application without a valid digital signature attempts to open it. However, if you trust the application, you can add it to the whitelist. Steps are as follow:

- Choose File > Preferences > Trust Manager.
- Click Change Settings in the Open Foxit PDF Reader from applications without valid digital signatures group.
- In the **Allowed Apps** field, specify the application you trusted, and click **Allow**. The trusted applications will be listed in **Apps** group. If you want to remove it from the list, please select it first, and then click **Delete**.
- Click **OK** to confirm and apply the setting.

# **Run Script Right Control**

Foxit PDF Reader allows users the rights to run script accordingly, and at the same time making sure the software executes and secures PDF files. There are four levels for users to choose: Disable JavaScript, Enable secured JavaScript, Enable JavaScript secured and verified by DRM, and Enable all JavaScript.

To set the run script rights, please follow the steps below:

To enable all JavaScript: Check Enable JavaScript Actions in File > Preferences >
 JavaScript and uncheck Enable Safe Reading Mode in File > Preferences > Trust
 Manager.

- To disable all JavaScript: Uncheck Enable JavaScript Actions in File > Preferences >
   JavaScript and check Enable Safe Reading Mode in File > Preferences > Trust
   Manager.
- To enable secured JavaScript: Check **Enable JavaScript Actions** in **File > Preferences > JavaScript** and **Enable Safe Reading Mode** in **File > Preferences > Trust Manager**.
- To enable JavaScript verified by DRM:
  - Check Enable JavaScript Actions in File > Preferences > JavaScript and Disable Safe Reading Mode for Trusted Documents in File > Preferences > Trust Manager.
  - Click Advanced Preferences in File > Preferences > Trust Manager to check both RMS Encryption and Digital Signature Verification.

# Automatic Foxit Approved Trust Lists and European Union Trusted Lists updates

The certificates in Foxit Approved Trust Lists (FATL) and European Union Trusted Lists (EUTL) are the trusted root certificates that are stored in a Foxit server and have been verified by Foxit and other authorities. You can enable the application to automatically check and download new or updated root certificates in FATL or EUTL from the server to local trusted certificate list. Any certificate-based signature created with the certificate in FATL or EUTL is trusted when the signed document is opened in Foxit PDF Reader.

To enable the automatic updates from FATL or EUTL, do the following:

- 1. Click File > Preferences > Trust Manager.
- In the Automatic Foxit Approved Trusted Lists (FATL) updates and Automatic European Union Trusted Lists (EUTL) updates group, you can find the following options:
  - Load trusted certificate from a Foxit FATL/EUTL Server: This option is selected
    by default and allows Foxit PDF Reader to automatically download new or
    updated root certificates in FATL or EUTL from the server to the local trusted
    certificate list under any of the following circumstances:
    - Every 28 days.
    - When you open a signed PDF and the signature's certificate has never been checked for update before.
    - When you open a signed PDF and the signature's certificate was checked for update more than 28 days ago.
  - **Ask before updating**: Select it and you will be prompted if any new or updated root certificate is available for download and install.
  - **Update now**: Click it to download and install from the latest FATL or EUTL immediately.

3. When the installing process completes, a message box will pop up to tell you the update is successful.

**Note**: A connection to the Internet is required for the update.

### AIP Protect (Available in Foxit PDF Reader MSI Package Only)

Foxit PDF Reader AIP Protect feature provides seamless integration with Microsoft Windows Rights Management Services to protect PDF documents from unauthorized use and manage rights policy templates. Foxit PDF Reader (EXE) allows you to open AIP-protected documents if the permission allows. With Foxit PDF Reader (MSI), you can also protect documents with AIP Protector to restrict users from opening, reading, modifying, or redistributing certain information. Foxit PDF Reader (MSI) offers a 14-day trial for the AIP Protect feature. When the free trial expires, you need to purchase an AIP license for further use.

Once installed, Foxit PDF Reader (MSI) will extend all Microsoft AIP services to all PDF files.

**Note:** If you open a PDF which is encrypted by AIP feature of Foxit PDF Reader (MSI) with other PDF programs, a wrapper (which is actually a PDF page) will prompt you to download Foxit PDF Reader/Foxit PDF Editor to open the PDF.

### **AIP Settings**

You can specify the AIP settings before you encrypt PDFs or open a link within an AIP-protected PDF. To specify AIP settings, please follow the instructions below:

- Go to File > Preferences > AIP Settings.
- Save encrypted file as a copy named "filename(protected)": Save the encrypted file as a copy named 'filename (protected).pdf' after adding AIP encryption to the file.
- Encrypt metadata: Check the box to encrypt metadata when encrypting PDF documents.
- Open Settings: Choose how to open the link within an AIP-protected PDF, in Foxit PDF Reader or in your browser.

### **AIP Encryption**

- 1. Go to **Protect** > **Restrict Access**.
- 2. Choose the template to add AIP encryption. If you have more than one server, first move the cursor to the name of the server, and then the templates on this server will be shown on the submenu. Click **Refresh Templates** to get the latest official templates from the

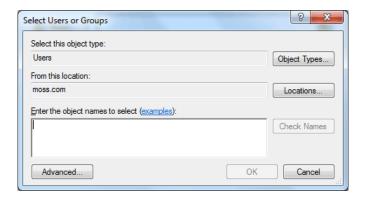
server. You also can create custom templates. For more detailed information, please refer to Template Creation.

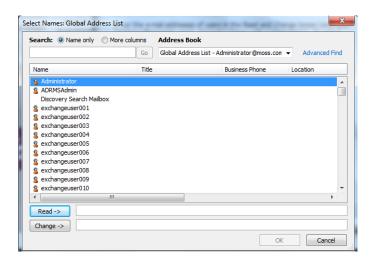
- 3. If you do not want to use the template, please click **Restricted Access**.
- Type your account name and password when you login to the AIP server for the first time.
- Click the icon Read... to add the users you want to authorize reading permission to. To authorize anyone to read this file, select the icon on the right side.

  (If you have an Outlook Email Client, the contact list of Outlook will pop up when you click the icon Read... You can choose the email addresses directly. You can also just type certain letters included in the email address, and then click the icon. The system will help you enter the complete address according to the contact list. Then you can go to the More Option Step.)

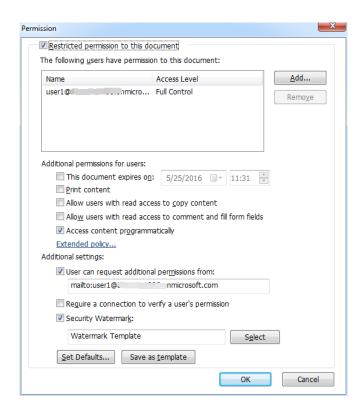


Choose the object types (users or group) and the server. Then type the e-mail
addresses of the authorized users into the text box or click **Advanced** to open the email address list on the server to choose an address directly.





- Click **OK** to exit **Select Users or Groups** dialog.
- Click **More Options** in **Permission** Dialog. The users you selected now will be shown on the text box. You can add or delete users as desired here.



### Additional permissions for users:

**This document expires on:** check it to set the expiration date. The document cannot be opened after the specified date.

**Print Content:** check this option to allow the users above to print the PDF files.

**Allow users with read access to copy content:** enable the users who only have reading permission to copy content.

**Allow users with read access to comment and fill form fields**: enable the users who only have Read permission to add comments and fill form fields.

**Access content programmatically**: enable users to run JavaScript in the document.

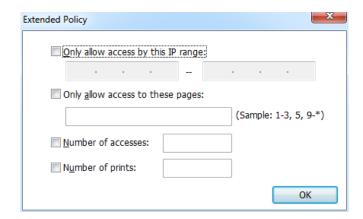
**Extended Policy**: complete PDF protection and control of document usage. The policy will allow document owners to control the following items:

**Only allow access to these pages**: specify the page number(s) that a user is allowed to access.

**Only allow access by this IP range**: specify an IP range that is allowed to access a document.

**Number of accesses**: specify the number of times that a user is allowed to access a document.

**Number of prints**: specify the number of times that a user is allowed to print a document.



**Note**: To specify the "Number of accesses" and "Number of prints" items in an on-premise environment, click the attached Web Service Configuration to configure the web service and SQL first, and then enable the extended policy with the <u>Foxit</u> <u>Configuration Tool</u>.

### Additional settings:

**User can request additional permissions from:** if users want to apply for any permissions, the application will open the email client and list the email address you typed into the text in the Recipient's Address automatically. You can type a URL as well.

**Require a connection to verify a user's permission:** check this option to let users verify their license every time they open the encrypted file.

**Security Watermark:** add a security watermark to the PDF files. For the detailed instructions, please refer to <u>Security Watermark Management</u>.

**Set Default:** set the additional settings as default.

**Save as template:** the security setting set above can be saved as a template for further use.

- 4. If users need to request additional permissions for a PDF file, please do the following:
- Open the file and choose File > Properties > Security.
- At the bottom of the **Security** tab, click **Request additional permissions** ....

**Note**: Foxit PDF Reader (MSI) also supports Microsoft IRM Specification V1, V2, and PPDF, of which Microsoft IRM Specification V2 is the default format when you encrypt PDFs with AIP. The encryption policy of Microsoft IRM Protection does not include dynamic watermark, extended policy, and dynamic revocation. To change the default Microsoft IRM

format, do the following:

- 1. Type regedit.exe in the Run window or in the search box of the Start menu and navigate to the following path: HKEY\_LOCAL\_MACHINE\SOFTWARE\Policies\Foxit\Reader \RMS\Preferences.
- 2. Create a new REG\_DWORD 32 value: Name: UseMicrosoftIRMV1.
- 3. Use the responding value to set the format as default as below.

PPDF: 0 V1: 1 V2: 2 PPDF: 3

### **Template Creation and Editing**

To create a custom template, please see the following steps:

- 1. Choose Protect > Settings > Custom Templates.
- 2. Click Create to open the Create Custom Rights Policy Template dialog box.
- 3. (Optional) If you want to edit the existed template, please click **Edit**.
- 4. Click **Add** to choose the language and edit template name and description. Click **OK**. The template name and description will be shown in the Template Identification list.
- 5. Click **Next** to add user rights. Click **Add** in Add Users and Rights.
- 6. In the pop-up Add User or Group dialog box, choose The e-mail addresses of users or groups, click Browse to simply add a user who you would like to assign rights to. Selecting Anyone allows every user to work with the encrypted PDF files. You can type multiple e-mail addresses as well.
- 7. Check PDF permissions for the specified users. You can set the permissions for all of the users or set different permissions for specific users.
- 8. **User can request additional permissions from**: if users want to apply for any permissions, the application will launch the email client and list the email addresses you typed into the text in the Recipient's Address automatically. You can type a URL as well.
- 9. Click **Next** to specify the expiration policy.

### **Content expiration**

**Never expires:** the PDF content can be viewed indefinitely.

**Expires on the following date:** the PDF content will expire on a given date.

**Expires after the following duration (days):** the PDF content will expire after the desired days selected.

### Use license expiration

Requires user to re-verify permissions with the server after the following duration (days): users need to apply for a new license to open the encrypted PDFs the specified number of days (the number you type into) later.

- 10. Click **Next** to set security watermarks and extended policies. Please refer to <u>Security</u> <u>Watermark</u> and <u>Extended Policy</u>. Then click **Finish** to complete creating the template.
- 11. Click **OK** in the **Manage Custom Rights Policy Templates** dialog box. The template will be added to the template list under **Protect** > **Restrict Access**.

### **Batch Protect PDFs with AIP**

You can apply AIP encryption to multiple PDF files at the same time with the Batch Encrypt command.

- 1. Click **Protect** > **Batch Encrypt**.
- 2. In the Batch Encrypt dialog box, click Add Files... to add the files or folders you want to encrypt. (Tip: If choosing Add Files..., in the Open dialog box, you can navigate through your local disk to select local files or click Open from ECM to select files from OneDrive-Personal or OneDrive for Business.) Use Move up, Move down, and Remove to adjust the order of the added files.
- 3. Click **Output Options...**. In the pop-up dialog box, select the destination folder and click **OK**.
- 4. Click **OK** in the **Batch Encrypt** dialog box.
- 5. Choose a rights policy template in the pop-up dialog box and click **Start Encryption**.
- 6. The encryption-process bar pops up to show the progress. When encryption is complete, the selected files will be encrypted and saved in the specified destination.

### **Security Watermark Management**

#### 1. Create Profile

Before adding a watermark, you should create a profile first. The application will apply all of the watermarks in the profile to the PDF.

Note: you can only choose a profile but not a certain watermark to use. Please create the watermarks you want to add to a PDF in the same profile.

- Choose Protect > Settings > Security Watermark to open Manage Security Watermark dialog box.
- Click New Profile to create a profile and name it.

#### 2. Add Watermark

### To add a new watermark, please do the followings:

- Open the Manage Security Watermark dialog box and select a profile you created and click Add to add watermarks in the profile.
- Type the watermark's name.
- Fill in the watermark's content in the text box and edit the settings for font, size, color, underline, and alignment.
  - Note: you can only set text as a watermark.
- Choose the Dynamic text. When any PDF reader opens the file, the watermark will show the current document information dynamically and will use multiple texts at the same time.

**Content ID**: shows the content ID of the current document.

**Document Title**: show the current document title. **Author**: show the author of the current document.

Current User: show the current user who is reading the document.

Date: show the current system date when opening the document.

Day: show the current system day when opening the document.

**Month**: show the current system month when opening the document. **Year**: show the current system year when opening the document.

**Time**: show the current system time when opening the document. **Hour**: show the current system hours when opening the document.

**Minute**: show the current system minutes when opening the document. **Second**: show the current system seconds when opening the document.

- Set the appearance by choosing the rotation degree and the opacity. You also have the option to make the scale relative to the target page.
- Set the vertical and horizontal distance between the target page and the watermark.
- Choose the page range to display the watermark. You can select the different page range options by selecting from the subset list.
- Preview the watermark in the right pane.
- Click **OK** to finish it.

### 3. Edit or Delete Watermark

#### Edit a Watermark

- Open the **Manage Security Watermark** dialog box and select a watermark you want to edit.
- Click **Edit** to open the **Edit Security Watermark** dialog box.
- To edit the watermark, please refer to <u>"Add Watermark"</u>.
- Click **OK** to finish the operation.

#### Delete a Watermark

Open the Manage Security Watermark dialog box and select a watermark you want

to delete.

• Click **Delete** to remove the selected watermark.

### 4. Import or Export Watermark

### Import a Watermark

- Open the Manage Security Watermark dialog box and click Import.
- Choose a watermark with .xml format.
- Click Open.

### Export a Watermark

- Open the Manage Security Watermark dialog box and select a watermark you want to export.
- Click **Export** and choose a file type and location to save.
- The watermark will be exported as an .xml file or an encoded file according to your choice. It can be integrated with the AIP policy template and applied to the PDF files by Foxit PDF Reader (MSI).

#### Note:

- 1. If you want to integrate the watermark to a common policy template, please export it as an .xml file and add it to the template with Foxit PDF Reader (MSI) directly.
- 2. If you want to integrate the watermark to an official policy template, please export it as an encoded file (.txt format) and integrate it into the template by AIP Scripting API Architecture. Then you can import the template and apply it to PDFs using Foxit PDF Reader (MSI). (Please click <a href="here">here</a> to see the example and use the value of "appData.Name" and "appData.Value" in the exported encoded file.)

### **Foxit Configuration Tool**

Foxit PDF Reader AIP protector provides a handy configuration tool for administrators to better modify the protection settings on an AIP server. Administrators can directly enable/disable each tool, edit the extended policies of official templates, dynamically revoke permissions, audit logs, set valid network printers, and customize wrapper files.

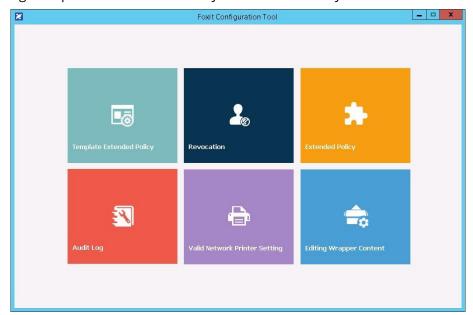
To use the configuration tool to encrypt PDFs, please do the following:

- Log in to your AIP server.
- Download the Foxit Configuration Tool from:
   Foxit Configuration Tool for X86

Foxit Configuration Tool for X64

• Unzip and Run Foxit Configuration Tool, you can then use the different tools in the Foxit Configuration Tool window. **Note**: Before getting started, you need to configure the VBScript in the unzipped folder by inputting your specific localhost address and

port number in the script. The default port number in the script is 80, such as admin\_role = config\_manager.Initialize(true,"localhost",80,"","",""). You need to change the port number to the one your server currently uses.



**Foxit Configuration Tool Window** 

### **Template Extended Policy**

With the **Foxit Configuration Tool**, administrators can easily edit the extended policy of official templates. Click **Template Extended Policy** tool and choose one template to edit. See also **Extended Policy**.

**Tip:** Click the Back \_\_\_\_ button in the left corner to return to the Foxit Configuration Tool window.

#### **Dynamic Revocation**

Revocation is a mechanism that revokes a PDF document that has already been issued. A common use of revocation is to remove rights from an individual when he is no longer authorized or to restrict access to a document when it becomes out of date or invalid.

**Note:** To revoke a PDF document/user in an on-premise environment, please refer to <u>Web</u> <u>Service Configuration</u> to configure the web service and SQL first. Then choose the **Revocation** 

To revoke a PDF document, click **Document Revocation**. Select the PDF document you want to revoke, click the **Add** button to add the document to the Revocation List. Or you can click **Browse** to select a document from a local drive to add to the Revocation List. To remove the revocation, please select the document in the Revocation List and click the

#### Remove button.

To revoke a user, click **User Revocation**. Click **Add** button to add a user to the User Revocation List. To remove the revocation, please select the user in the list and click **Remove** button.

### **Extended Policy**

Foxit Configuration Tool provides you with Extended Policy to add complete PDF protection and control to your PDF documents. The policy allows documents owners to control the number of access and the number of prints in an on-premise environment. Before you specify the two permissions, please refer to <a href="Web Service Configuration">Web Service Configuration</a> to configure the web service and SQL first, and then choose the **Extended Policy** tool in the

Foxit Configuration Tool window and enable the tool by clicking the button .

### **Auditing Logs**

Foxit PDF Reader (MSI) enables you to track the usage of AIP-protected files to record the actions on the files during workflow, including who accessed the document, what document was accessed, when it was accessed, how it was accessed and the success of that access, and more.

To audit logs, please refer to <u>Web Service Configuration</u> to configure the web service and SQL first, and then choose the **Audit Log** tool in the Foxit Configuration Tool window and enable the tool by clicking the button .

Choose one log and click on the **Export** button to export to Foxit PDF Reader's registry or Foxit PDF Editor's to generate a .reg file for the administrator's configuration. The administrator can distribute the .reg file to client-end computers.

### **Restrict Local Printing**

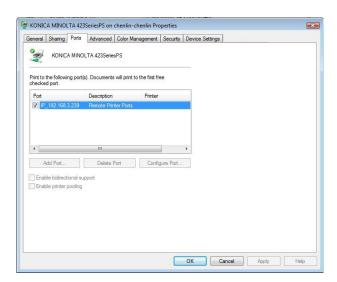
You can also set the printing permissions by specifying certain network printers to protect the sensitive information from being printed arbitrarily.

### ♦ Network Printers Configuration

To avoid unauthorized printing of sensitive documents, you can limit the printing permissions to certain network printers. To configure network printers, please refer to <a href="Web Service Configuration">Web Service Configuration</a> to configure the web service and SQL first, and then click the <a href="Valid Network Printer Setting">Valid Network Printer Setting</a> tool and in the "Foxit Configuration Tool" window click the

button	to enable this tool.
Datton	to chable this tool.

1. You should get the Printer Port first. Please go to **Start > Devices and Printers >** right-click a network printer **> Printer Properties**. In the printer properties dialog box, select the **Ports** tab and get the information, e.g.: "IP\_192.168.3.239" is the printer port.



2. Click **Add** button in the "Foxit Configuration Tool" dialog box to add the Printer Port. You can also remove a printer port by choosing it and clicking **Remove**.

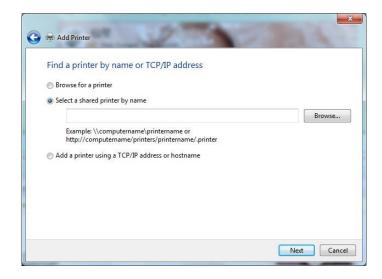
**Note**: About how to add a network printer, please see "Add a Network Printer".

#### ♦ Add a Network Printer

There are two devices to add a network printer as below:

 Go to Start > Devices and Printers > Click Add a printer. In the Add Printer dialog box, click The printer that I want isn't listed to go on to the next step.

Follow the instructions shown in the **Add Printer** dialog box shown below to complete adding a printer.

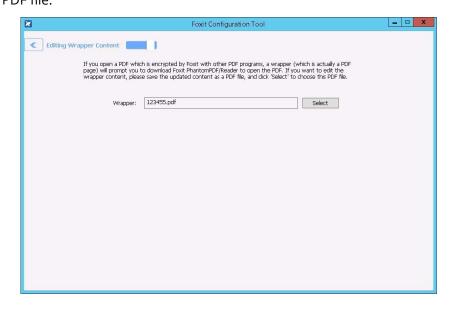


- Open the Run box by pressing shortcut keys Win + R, enter the printer URL you want to add and click OK.
- In the pop-up dialog box, right-click the printer and choose **Connect** on the context menu.

#### **Edit Wrapper Content**

If you open a PDF which is encrypted by Foxit with other PDF viewers, a wrapper (which is a PDF page) appears with a prompt that you need to download Foxit PDF Reader/Foxit PDF Editor to open the encrypted PDF. With Foxit Configuration Tool, you can customize the wrapper by selecting a desired PDF file.

To apply a custom wrapper, please refer to <u>Web Service Configuration</u> to configure the web service and SQL first. Then choose the **Edit Wrapper Content** tool in the Foxit Configuration Tool window, enable the tool by clicking the button, and select a desired PDF file.



### Classify and protect PDFs with sensibility labels in AIP

With Foxit PDF Reader, you can classify and protect documents with sensitivity labels configured by the administrator in your organization.

- 1. Open your PDF with Foxit PDF Reader.
- Click Protect > Sensibility. (Sign in to your AIP account if you haven't by clicking Connect to Microsoft Azure Information Protection to get the list of configured sensibility labels.)
- 3. Select a label from the list to apply to the document.
- 4. When the labelling process is complete, the document is saved automatically.

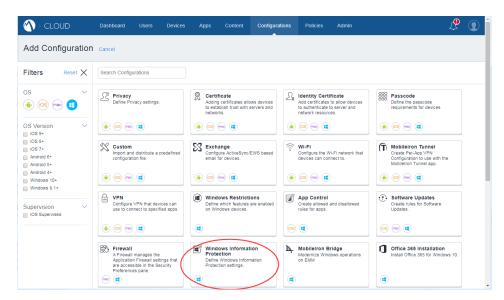
# Window Information Protection (Available in Foxit PDF Reader MSI Package Only)

Windows Information Protection (WIP), a feature that enterprises use to protect enterprise data by encrypting it and separating it from personal (or employees') data, provides a way to manage data policy enforcement for enterprise apps and documents. For enterprises that are using WIP policies can include Foxit PDF Reader and network locations in their policy restriction on PDF documents, which helps to protect enterprise data against potential data leak on enterprise owned-devices and personal devices that employees bring to work.

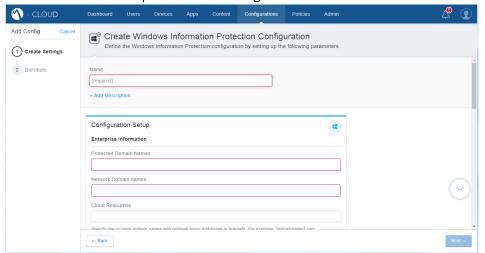
**Note**: To run WIP in your system, Windows 10 (version rs2 and later) is required.

Administrators in enterprises often use Microsoft Intune or MobileIron to define and deploy WIP policies. Here, we'll use a MobileIron example to explain how to add Foxit PDF Reader and the network locations to your WIP policies.

- 1. Sign in MobileIron at <a href="https://login.mobileiron.com/login.html">https://login.mobileiron.com/login.html</a> in the Google Chrome browser or Firefox browser.
- Go to Configuration > + Add to create a WIP configuration (or a WIP policy).
- 3. (Optionally) You can choose an existing WIP configuration to add Foxit PDF Reader and the network locations where Foxit PDF Reader can access enterprise data.
- 4. In the left part of the webpage, click on the Windows icon in the OS option. Then select the **Windows Information Protection** configuration from configuration types in the right part of the webpage.



5. Enter a name and a description for the configuration.



- 6. In the **Configuration Setup** section, specify the settings as appropriate (For the details, please refer to <u>MobileIron's help on WIP</u>.). You can add the network locations and Foxit PDF Reader to the WIP configuration in **Cloud Resources** and **App Control** respectively.
- 7. Click **Next**.
- 8. Select a distribution for this configuration.

**Note**: For **Cloud Resources**, add the Enterprise resource domains hosted in the cloud where Foxit PDF Reader can access the enterprise data. You can choose one or multiple network locations to be protected with your WIP policies from the following URLs as needed. If you have multiple resources, separate them using the semicolon.

OneDrive for Personal: onedrive.live.com

OneDrive for Business: office.live.com

(Tip: OneDrive for Business is only available in the activated Foxit PDF Reader MSI Package)

**Dropbox**: www.dropbox.com

**Box**: www.box.com

**Google Drive**: drive.google.com

(Note: For SharePoint network, you can enter your custom URL.)

# **Chapter 5 - Comment**

Foxit PDF Reader provides you with various commenting tools to add comments in PDF documents. Comments can be notes or drawings that are intended as an opinion, an explanation, an illustration, or a statement of fact or opinion, essentially a remark that expresses personal reaction or attitude. You can type a text message or add a line, circle, or other types of shape to make comments in PDFs with Foxit PDF Reader commenting commands. You can also edit, reply, delete, and move comments with ease.

# **About the Commenting Commands**

Annotation commands make adding annotations on PDFs possible. There are various groups of annotation commands with different functions for you to choose: Typewriter, Drawing Markups, and Text Markups. They are placed under the **Comment** tab.

# **Selecting Commands to Add Comments**

• Select **Comment** > select a command you want to use under the toolbar.

## **Adding Note Comments**

The most used type of comments is the note comments. A note comment leaves a note icon on the page where you placed it, and a <u>pop-up note</u> for your text message. Read below to learn how to add a note comment in the document.

#### To Add a Note Comment

- To add a note comment, please click the **Note** command in the **Comment** tab, click where you want to place the note.
- Add a text message to the Note comment and change the appearance of the Note comment. See also "Add a text message to text markups".
- Drag its lower-left or lower-right corner to resize the pop-up note.
- Click and drag the title bar of the pop-up note to move its position.

#### **Aligning and Centering Note Comments**

- Choose the Note command, Hand command or Select Annotation command.
- Follow the steps specified in "Arrange the measurement markups".

#### **Deleting a Note Comment**

- Choose the Note command, Hand command or Select Annotation command.
- Do one of the following:
  - A. Click the note icon, and press the **Delete** key.
  - B. Right-click the note icon, and choose **Delete** from the pop-up context menu.
  - C. Choose **Delete** from the **Options** menu of the pop-up note.
  - D. Right-click the note comment in the Comments panel, and choose **Delete** from the context menu.

# **Using the Text Markups**

You can use the Text Markup commands to indicate which text should be edited or noticed. Text Markups fall within the comments category and can be made visible/invisible by clicking **Comment > Manage Comments > Comments > Show All/ Hide All**. They do not change the actual text in the PDF. Instead, they indicate which text should be deleted, inserted, highlighted, or underlined. Text Markup commands include the Highlight, Underline, Strikeout, Squiggly Underline, Replace Text and Insert Text.

#### **Text Markups**

Button	Name	Description
D	Highlight	To mark important passages of text with a fluorescent (usually) marker as a means of memory retention or for later reference.
T	Underline	To draw a line under to indicate emphasis.
于	Strikeout	To draw a line to cross out text, making others know the text is deleted.
I	Squiggly Underline	To draw a squiggly line under.
<u> </u>	Replace Text	To draw a line to cross out text and provide a substitute for it.
T	Insert Text	A proofreading symbol (^) used to indicate where something is to be inserted in a line.

Foxit PDF Reader offers convenience to users when they change color and opacity of the comments. You can modify color and opacity, and then add any Text Markups to the PDF file. Foxit PDF Reader will automatically remember the color and opacity settings.

Using highlight, underline, strikeout, squiggly and replace command

1. Highlighting, underlining, striking out, squiggling or replacing text

- Choose Comment > Highlight  $\angle$ , Underline  $\Box$ , Strikeout  $\Box$ , Squiggly Underline  $\Box$ , Replace Text  $\Box$  or Insert Text  $\Box$ .
- (Optional) Change the appearance of text markup comments in the Format panel.
- Click and drag from the beginning of the text that you want to mark up. After adding text markups with the Highlight, Underline, Strikeout, Squiggly Underline, or Replace Text tool, you can still drag the handle at the beginning or end of the text to adjust the text range you have selected.

# 2. Adding a text message to highlight, underline, strikeout, or squiggly underline markups

- If you have opened the Comments panel, the text field associated with the text markup will be activated automatically in the Comments panel for you to input text message right after you create a text markup. Or, if you have enabled opening the pop-up note after adding a comment in the <a href="Commenting preferences">Commenting preferences</a>, Foxit PDF Reader will also open the pop-up note on the document pane for you to input text messages. You can also follow the steps in "Open pop-up notes" to open the pop-up note on the document pane to input text message.
- Type text in the pop-up note on the document pane or the text field in the Comments panel. You can also use the Select Text and Image command to copy and paste text from a PDF into the note, or copy the note using Ctrl + C in other applications. Text that you input in the pop-up note will be shown in the default font and size specified in the comment preferences. If you need to format the text in the pop-up note, select the text and choose the desired option in the Format panel. When you change the font and size for text in the current pop-up note, Foxit PDF Reader will remember the font and size and apply them in the new pop-up notes until you change it or restart the application. After you change the font and size, the text format for the pop-up notes listed in the Comment Panel will be changed accordingly as well. Based on your setting in the Commenting preferences, a small sticky note may be shown around the text if it includes text comments in its pop-up note.
- After inputting the text message, click anywhere outside the pop-up note (or click
  - in the Comments panel) to confirm your input. And if necessary, follow the steps in "Close pop-up notes" to close the pop-up note.

Tip: If you want to add the selected text in PDF document to the pop-up notes of text markups automatically, please go to File > Preferences > Commenting and check the Copy selected text into Highlight, Squiggly Underline, Underline, and Strikeout comment pop-ups option.

#### 3. Deleting a highlight, underline, strikeout, squiggly underline, or text replacement

#### Do one of the following:

- Select the Hand command, Select Annotation command or the corresponding Text Markup command > click the markup > press **Delete** key.
- Select the Hand command, Select Annotation command or the corresponding Text
  Markup command > right-click the markup > choose **Delete** from the pop-up
  context menu.
- Choose **Delete** from the **Options** menu of the pop-up note.
- Right-click the markup in the Comments panel, and choose **Delete** from the context menu.

# **Using the Select Text and Image Command**

The Select Text and Image command enables you to use most text editing features, including highlight, strikeout, underline, squiggly underline and replacement. It has integrated the Select Text function with Text Markup commands. When you select text with the Select Text and Image command, a menu of text editing options will appear on the context menu or floating toolbar.

#### **Marking up Text with Edits**

- Choose **Select Text and Image** in any tab except for the **File** and **Help** tabs.
- Select the text you want to mark up, select an option from the floating toolbar (or right-click the selected text and choose an option from the context menu). For more information about marking up text, please refer to "<u>Using the Text Markups</u>".

# **Using the Drawing Markups**

Drawing markups help you to make annotations with drawings, shapes, and text. You can use the Drawing Markups to mark up a document with arrows, lines, squares, rectangles, circles, ellipses, polygons, polygon lines, clouds, and other shapes. Drawing Markups provide another kind of annotation. The table below describes exactly what Drawing Markups do.

### **Drawing Markups**

Button	Name	Description
7	Arrow	To draw something, such as a directional symbol, that is similar
		to an arrow in form or function.
/	Line	To mark with a line.
	Rectangle	To draw a four-sided plane figure with four right angles.
0	Oval	To draw an oval shape.

$\Diamond$	Polygon	To draw a closed plane figure bounded by three or more line segments.
l	Polyline	To draw an open plane figure with three or more line segments.
<u>&amp;</u>	Pencil	To draw free-form shapes.
$\triangle$	Eraser	An implement, acts as a piece of eraser, used for erasing the pencil markups.
	Cloud	To draw cloud shapes.
	Area Highlight	To highlight a specified area, such as a certain text range, an image and blank space.

### **Adding Drawing Markup**

Consider the effect you want before selecting a drawing command.

- Choose **Comment** and click the drawing command as needed in the **Drawing** group.
- (Optional) Change the appearance of drawing markup comments in the **Format** panel.
- To draw a line or arrow, drag the cursor across the area where you want to markup.
- To draw a square, rectangle, circle, or oval, drag the cursor across the area where you want the markup to appear.
- To create a polygon, polyline, or cloud shape, click to create the start point, move the pointer, and then click to create each segment. To finish drawing the shape, double click to complete it.
- To draw free-form lines using the **Pencil** command, drag across the area to make any shape you want. You can release the mouse button, move the pointer to a new location, and continue the drawing.
- To erase parts of the pencil drawings, select the **Eraser** command, click the pencil drawings, and click them again when an eraser appears on the drawings.

#### Tips:

- To draw a line that is horizontal, vertical, or at a 45-degree angle, hold Shift while you draw with the Line command.
- To draw a square or circle with the Oval command or Rectangle command, press Shift while you draw.
- Right-click the markup or click the option on the comment box to open the properties box. Set the properties according to your requirements.
- If you draw a line or arrow, you can enable the comment to be shown on the line or arrow by checking **Show text in line** in the **Line Properties** dialog box.

### **Adding Area Highlight**

Foxit PDF Reader lets you highlight specified areas, such as a certain text range, image, or blank space.

- To highlight an area, select Comment > Area Highlight.
- (Optional) Change the highlight color in the **Format** panel.
- Click and drag the mouse across the text range, image, or blank space that needs to be highlighted.

#### Adding Free-form Annotation with PSI (Pressure Sensitive Ink)

Foxit PDF Reader adds PSI support for free-form annotation. You can use the Surface Pro Pen or Wacom Pen to add free-form annotations with PSI in PDFs. Detailed steps are as follows:

- (For Surface Pro users) Choose **Comment** > **Pencil**, and then add free-form annotations as desired with the Surface Pro Pen;
- (For Wacom tablet users) Connect your Wacom tablet to the computer, choose **Comment** > **Pencil**, and then add free-form annotations with the Wacom Pen.

#### Editing, resizing or moving the markup

Use the Hand command, Select Annotation command or the corresponding Drawing command to select a drawing markup.

- To edit the drawing markup, right-click it, select **Properties** and do settings as needed.
- To resize the drawing markup, select it, and drag one of the handles to make your adjustments.
- To move the drawing markup, select it, and drag it to the target place.
- To add or edit the text message for the markup, see the instructions in "Adding a text message to highlight, underline, strikeout, or squiggly underline markups".
  - **Tip**: If you want to automatically add the text circled using the drawing markup tools (except Pencil) to the pop-up notes associated with the drawing markups, please go to **File** > **Preferences** > **Commenting**, and check the **Copy encircled text into Drawing comment pop-ups** option.
- If you draw a line or arrow, you can enable the comment to be shown on the line or arrow by checking **Show text in line** in the line properties box.
- Check **Set Current Properties as Default** in the properties box so that the current settings can be applied next time by default.

### Aligning and centering drawing markups

- Choose the Hand command or the Select Annotation command.
- Follow the steps specified in "Arrange the measurement markups".

#### **Deleting the Markup**

Do one of the following:

- Select the Hand command, Select Annotation command or the corresponding Drawing command > select the markup to be deleted > press the **Delete** key.
- Select the Hand command, Select Annotation command or the corresponding Drawing command > right-click the drawing markup > choose **Delete** from the context menu.
- Choose **Delete** from the **Options** menu of the pop-up note.
- Right-click the markup in the Comments panel, and choose **Delete** from the context menu.

#### **Grouping the Markups**

Grouping drawing markups enables you to combine them so that you can work with them altogether. You can move or delete the group, set its status, change its appearance, and apply other preferences.

Select the Hand command or Select Annotation command, and do one of the following:

- To group the markups, select the markups you want to group by pressing Ctrl > rightclick on one of the selected markups, and then choose **Group**.
- To work with a group, select one of the markups, and then work with the grouped comment just like working with a single comment.
- To ungroup the markups, select the group > right-click on it, and choose **Ungroup**.

# **Using the Typewriter Commands**

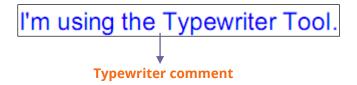
The Typewriter commands include Typewriter, Callout, and Textbox.

### **Using the Typewriter Command**

You can use the Typewriter command to add comments anywhere on a PDF.

**Note:** The Typewriter command can be used to fill forms.

See also "Filling non-interactive forms".



#### **Adding Comments with Typewriter**

- Choose Comment > Typewriter.
- Click on the area to type any text you want. Optionally, you can set the font format, bulleted/numbered list, text alignment, and more in the **Format** panel. See also "Changing the appearances of comments in the **Format** panel".
- Press Enter if you want to start a new line.
- To finish typing, click anywhere outside the text you have inputted.

#### **Editing the Typewriter Comment**

To edit the typewriter comment, do either of the following:

- On the document pane, double-click the comment with the Hand command, Select Annotation command or Typewriter command to activate the text field. Then follow the steps in "Adding Comments with Typewriter" to edit the text.
- In the Comments panel, double-click the comment that you want to edit, or right-click
  the comment and choose Edit. Then edit the text in the activated field, and click.

### **Moving the Typewriter Comment**

Select Hand command, Select Annotation command, or Typewrite command, click the typewriter comment, and move it to the intended place.

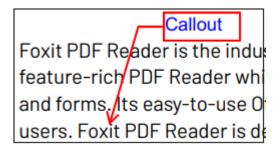
#### **Deleting the Typewriter Comment**

Click the Select Annotation command, Hand command, or Typewriter command, right-click the text field, and choose **Delete**.

# **Adding Comments in a Text Box or Callout**

The Callout and Textbox features are designed for users to create comments in a callout format text box or just a box.

A callout text box contains a text box and an arrow, which is especially useful when you want to single out (but not obscure) a particular area of a document.



A text box is a rectangle of any size, with a border that separates the text box from the rest of the interface, allowing the user to input text. A text box usually remains visible on the document page. It doesn't close like a pop-up note.

Text box

Foxit PDF Reader is the industreature-rich PDF Reader white and forms. Its easy-to-use Offusers. Foxit PDF Reader is determined to the control of the control of

**Note:** Callout text boxes and Text boxes only allow for horizontal text.

#### **Adding a Callout or Text Box**

- Choose Comment > Callout/Textbox.
- Click the place where you want to insert the callout or text box. Optionally, you can set the font format, bulleted/numbered list, text alignment, and more in the **Format** panel. See also "Changing the appearances of comments in the **Format** panel".
- Type the text. Text wraps automatically when it reaches the right edge of the box.

#### Resizing, moving, editing or deleting a callout or text box

Select the Hand command or Select Annotation command, and do one of the following:

- To resize the callout or text box, select it, and drag any of the sizing handles to resize it.
- To move a textbox comment, click on it (the cursor changes to a solid arrow ►), and drag it to the intended place.
- For a callout comment, select it, then drag the text box to move the text box only, drag the line with the arrow to move the entire callout, or drag the arrow only to move the arrow to the position you want to point to.
- Specify the formats in the **Format** panel. For detailed information, please refer to "Changing the appearances of comments in the **Format** Panel".
- To edit the text in the callout or text box, please refer to "Editing the Typewriter Comment".
- To delete the callout or text box, select it and press **Delete**, or right-click it, and then choose **Delete**. Or just right-click the comment in the **Comments** panel, and choose **Delete** from the context menu.

#### **Aligning and Centering Callout or Text Box Comments**

- Choose the Hand command or Select Annotation command.
- Follow the steps specified in "Arrange the measurement markups".

# Adding a File as a Comment

Do the following:

- Choose Comment > File.
- Click the place in which you want to attach the file.
- In the **Open** dialog box, select the file you want to attach, and click **Open**.

**Note:** If you try to attach certain file formats (such as EXE), Foxit PDF Reader will warn you that attempting to attach the file of this type is denied due to your security settings.

- The File Attachment icon will appear at the place you designated in the PDF file.

  If necessary, you can drag the File Attachment icon to adjust its position in the PDF file.
- (Optional) When you click the icon —, you will find a toolbar floating around the comment, which allows you to change the color of the icon quickly. Or you can change the appearance of the icon in the **Format** tab that appears in the right panel when you select a comment or are making a comment.
- (Optional) Add a text message to the file attachment comment. To do this, click the icon  $\stackrel{\longleftarrow}{+}$ , select the **Edit note** icon  $\stackrel{\longleftarrow}{-}$  on the floating toolbar to open the pop-up

note on the document pane, and then type a text message.

# **Using the Spell Checker**

Spell checking is enabled by default. When you add text comments with Typewriter/Textbox/Callout commands or input text in comment pop-up notes, Foxit PDF Reader will try to find any spelling errors and highlight them with squiggly lines.

- Right-click on the misspelled words, and you will see a list of suggested words.
- Choose one of the suggested words to replace the original text, or ignore the squiggly line.

If you want to disable spell check, please go to **File** > **Preferences** > **Spelling** > uncheck **Enable spell check** option.

**Tip**: You can add, remove, or reorder dictionaries in **File** > **Preferences** > **Spelling**.

# **About pop-up notes**

Most comments (except Typewriter, Callout, Text Box, and Eraser) include a pop-up note associated with them. You can type text message in their pop-up notes to communicate ideas or provide feedback for the document (See also Replying to comments). This type of pop-up note also includes an Options button which provides various options for more actions. When you create a comment, Foxit PDF Reader will automatically activate the text field in the Comments panel (if you have opened the Comments panel when adding a comment), or open the pop-up note automatically on the document pane (if you have specified the corresponding settings in the Commenting preferences) right after you add the comment. When you are viewing comments in the Comments panel, you can also double-click a comment or right-click a comment and choose Edit from the context menu to edit the text messages in the pop-up note. (Note: For all types of comments except the Eraser comment, when you put the cursor over them, a message note appears showing the information about the comment like the author, the text he typed, or the name of the file attachment.)

Sometimes pop-up notes are hidden or closed. To open pop-up notes, select the **Hand** command, **Select Annotation** command, or the corresponding commenting tool, and then do any of the following:

Make sure you have enabled Foxit PDF Reader to show the floating toolbar after a
comment is created or selected in <u>Commenting preference</u>. Then click on the
comment, and select the **Edit note** icon on the toolbar floating above the

- comment to open its pop-up note.
- Double-click the comment. **Note**: When the **Comments** panel is hidden, double-clicking the comment opens (or closes) the pop-up note on the document pane. With the **Comments** panel open, double-clicking the comment activates the text field associated with the comment in the **Comments** panel for you to add or edit the text message in the pop-up note. However, for a file attachment comment, double-clicking the file attachment icon opens the file attachment (if you have permissions), whether the **Comments** panel is hidden or open.
- Right-click the comment, and choose Open Popup Note to open the pop-up note
  of the selected comment or Open All Popups to open the pop-up notes of all the
  comments in the document.
- Click **Comment** > **Manage Comments** > **Popup Notes** > **Open All** to open the pop-up notes of all the comments in the document.

To close or hide pop-up notes, select the **Hand** command, the **Select Annotation** command, or the corresponding commenting tool, and then do any of the following:

- Click the **Close** button on the pop-up note.
- Right-click the comment, and choose Close Popup Note to close the pop-up note
  of the selected comment or Close All Popups to close the pop-up notes of all the
  comments in the document.
- Make sure that you have closed the Comments panel, and then double-click the comment.
- Click Comment > Manage Comments > Popup Notes > Close All to close the pop-up notes of all the comments in the document.

You can adjust the location of a pop-up note to make sure that it does not overlap the contents. To move a pop-up note, directly drag it to the desired position. (*Tip: You can move the pop-up note to anywhere on the page where its associated comment is located.*) If you need to restore a pop-up note to the default location, right-click the comment with the **Hand** command, the **Select Annotation** command, or the corresponding commenting tool, and choose **Reset Popup Note Location** from the context menu.

#### Note:

- 1. If you choose **Comment > Manage Comments > Comments > Hide All**, all comments in the document along with their associated pop-up notes will be hidden; choose **Comment > Manage Comments > Comments > Show All**, all comments in the document along with their associated pop-up notes (except any you had closed) will reappear.
- 2. When viewing comments, the text in pop-up notes will be displayed in the font and size you specified in the <u>comment preferences</u>. To change the default setting, please go to **File** > **Preferences** > **Commenting**, and specify the font and size in the **Viewing Comments** group.

# **Managing Comments**

## **Selecting comments**

- 1. Select the **Select Annotation** command, the **Hand** command, or a commenting tool.
- 2. As you put the cursor over a comment, the cursor changes to a solid arrow ▶. However, with a commenting tool selected, the cursor changes to a solid arrow only when over the corresponding type of comments and you can only select the same type of comments.
- 3. Click on a comment to select it. To select multiple comments at the same time, Ctrl-click or Shift-click the comments you need.

### **Viewing Comments**

### **Viewing all Comments**

Foxit PDF Reader lists all the comments in the Comments panel. The Comments panel displays the total number of comments and also provides common options such as sorting and filtering to help users work with comments.

To view all the comment in the Comments panel:

- Go to **View** > **View Setting** > **Navigation Panels** > **Comments** or click in the Navigation pane to open the Comments panel.
- In the Comments panel, comments are displayed by group based on the sorting category. You can double-click the group title (e.g., <Page Number> group if they are sorted by page) or click the **Collapse** icon **★/Expand** icon **★** in the group title to collapse or expand all the comments in that group. If you want to jump to the page where the comment located for detailed information, just click the comment in the Comments panel. In the document page, the comment is displayed in the pop-up note or on the markup icon and acts as a tooltip when the pop-up note is closed.
- In the Comments panel, you can find the following options to work with comments:
  - $\diamond$  Expand All = expands all of the items listed in the Comments panel.
  - $\diamond$  Collapse All = collapses all of the items in the panel.
  - $\diamond$  Next  $^{\boxdot}$  goes to the next comment if you choose to expand all the items.
  - ♦ Previous goes to the previous comment if you choose to expand all the items.
  - Sort By ♣ -selects to sort the comments by type, page, author, date, status, checkmark status, or color. For more information, please refer to "Sorting"

#### Comments".

- ♦ Show/Hide Comments = -select to show/hide all comments, or open/close all pop-up notes.
- ♦ Search box Search comments.
   For more information, please refer to "Searching Comments".
- $\diamond$  Filter Comments  $\nabla$  filters comments by author, status, type or color. For more information, please refer to "Filtering Comments".

#### **Searching Comments**

Foxit PDF Reader offers a quick search option for comments.

To search comments, just follow the steps below:

- Choose **View** > **View Setting** > **Navigation Panels** > **Comments** (or click the Comment icon on the left side of the Navigation panel) to open the Comments panel.
- Input the keywords in the Search Box on the top of the Comments panel, and Foxit PDF Reader will filter the comment contents and display the results in the Comments panel.

#### **Sorting Comments**

Usually, comments are listed by pages in the document. However, you can sort them by type, author, date, status, or checkmark status for easy reference.

To sort the comments, please follow the steps below:

- Go to **View > View Setting > Navigation Panels > Comments** (or click comment icon on the left side of the Navigation panel) to open the Comments panel.
- Click the **Sort By** icon 2 and choose relevant option.
  - Page: to sort comments by page. For comments on the same page, Foxit PDF Reader will list them based on their positions, from left to right and top to bottom.
  - > Type: to sort comments by the types of commands, such as typewriter, note, file attachment.

- Author: to sort comments by their creators.
- > Date: to sort comments by the date they are created.
- Status: to sort comments by their status; such as rejected, approved, completed or canceled.
- Checkmark Status: to sort comments by checkmark status.
- Color: to sort comments by colors.

#### **Filtering Comments**

You can filter comments by author, review status, type, or color in Foxit PDF Reader. Steps are as follows:

- Choose View > View Setting > Navigation Panels > Comments (or click the
   Comment icon on the left side of the Navigation panel) to open the Comments panel.
- In the Comments panel, click the **Filter** icon  $\nabla$  to open the **Filter Comments** dialog box.
- In the **Filter Comments** dialog box, select the filtering option(s) as needed. If you only want to filter the comments by the original author and ignore all the replies, please check **Filter by the original author only** as well. Upon completion, click **OK**.

The comments that match the filtering criteria will be listed in the Comments panel. If you want to remove the filter and show all the comments after checking, you can follow the steps stated above to open the **Filter Comments** dialog box, and then click **Clear All** > **OK**.

Tip: If a comment has multiple statuses, Foxit PDF Reader will check the latest status when filtering comments, and list the comments whose latest status match the filtering criteria.

# **Cut, Copy, Paste and Delete Comments**

#### **Cut Comments**

Cutting removes selected comments from the current location. Once you cut the comments, you can paste within the same document, into a different document.

- Select comments to be cut.
- Select Cut from the right-click menu, or press Ctrl + X.
- You are now ready to paste.

#### **Copy Comments**

Once you copy the comments, you can paste within the same document, or into a different document.

- Select comments to be copied.
- Select **Copy** from the right-click menu, or press **Ctrl + C**.
- You are now ready to paste.

#### **Paste Comments**

You can paste comments within the same document, or a different document in Foxit PDF Reader.

- Copy or cut the selected comments.
- Do one of the following to paste the comment as required:
  - > To paste the comment at the specified location, right-click on the page you want to paste the comment, and select **Paste**.
  - > To paste the comment at the center of the page, press **Ctrl** + **V**.
  - > To paste the comment at the same position on a different page, right-click anywhere on the target page, and choose **Paste in Place**.

#### **Delete Comments**

- Select the annotation to be removed with the Hand command, the Select Annotation command, or the corresponding annotation tool.
- Choose **Delete** from the right-click menu, or press **Delete**.

#### **Rotate Comments**

You can rotate comments added by the Drawing Markup, Typewriter, Textbox, Callout, and Pencil tools.

- Select the **Select Annotation** command, the **Hand** command, or the corresponding commenting tool.
- <u>Select the comment(s)</u> that you want to rotate, and you will find the rotation handle at the top of the selected comment(s).
  - **Tip**: If you select multiple comments, all the comments will be rotated as a group at the same degrees.
- Drag the rotation handle to rotate the selected comments at any degree. While
  dragging the rotation handle, you can also press **Shift** to rotate the comments in 15degree increments.

## **Setting a Status**

Setting a status is useful for keeping track of comments that you have read. You can use the status to indicate which comments you want to accept, reject, cancel, complete, or mark for future consideration.

By setting the review status, you can let review participants know how you are going to handle the comments. Once the review status is set, you cannot remove the review status display from the history in the Review History list, even if you change the review status to None.

#### **Changing the Status of a Comment:**

Foxit PDF Reader allow users to set comments as Accepted, Rejected, Cancelled, Completed, Deferred, and mark for future consideration.

- To change the status of a comment:
  - A. Right-click a comment in the document pane or Comments panel.
  - B. Select **Set Status**, and choose a status as desire from the drop-down menu.
- To view a markup's history of changes:
  - A. Right-click the markup in the document pane or Comments panel, and then choose **Properties**.
  - B. In the **Properties** dialog box, click the **Review History** tab to view the history of changes people have made to a status of a comment.

#### **Setting Checkmark Status for Comments**

Checkmarks are useful for keeping track of comments you have read or those that require further action. You can make checkmarks for each comment according to your needs.

To set the checkmark of a comment, do one of the following:

- In the document pane, right-click the comment and choose **Mark with Checkmark** from the drop-down menu.
- In the Comments panel, select a comment, and any of the followings:
  - > Click beside the comment, and choose **Mark with Checkmark**.
  - Right-click the comment and choose Mark with Checkmark from the drop-down menu.

After marking the comments with checkmarks, you can sort comments by checkmark

status for easy reference.

# **Changing the Appearance of Markups**

You can change the appearance of markups in the floating toolbar, the **Format** panel, or the comment properties dialog box. If you change the appearance through the **Format** panel, Foxit PDF Reader will save the properties and apply them in any new markups as well. If you change the appearance via the **Properties** dialog box and do not check the **Set Current Properties as Default** option in the dialog, Foxit PDF Reader will only apply the properties to your currently selected markup.

#### Changing the appearances of comments in the floating toolbar

If you have checked the "Show floating toolbar when comments are created or selected" option in <u>Commenting preference</u>, you will find a toolbar floating around the comment after you create a comment or select an existing comment. From the floating toolbar, you can quickly adjust the font size (for typewriter comments only), change the color for comments, open the pop-up note to input text message, or show the **Format** panel to do more professional settings. (*Tip: The options available in the floating toolbar may vary based on the type of comment you have selected*.)

#### Changing the appearances of comments in the Properties dialog box

- Open the **Properties** dialog box by one of the following steps:
  - A) Right-click the comment, and choose **Properties** from the context menu.
  - B) Click **Options** in the comment pop-up window, and choose **Properties**.
- In the **Properties** dialog box, do any of the following, and then click **Close**.
  - Click the **Appearance** tab to change the color, opacity, thickness, or border style of the comment. The options vary based on the type of comment you have selected.
  - Click the General tab to change the author's name and subject of the comment.
  - Click the **Review History** tab to see the history of changes people have made to the status of a comment during a review. See also <u>"Setting a status"</u>.

Tip: In the **Properties** dialog box, you can: 1) check **Locked** option to lock the current settings and prevent others from changing the properties; 2) check **Set Current Properties as Default** option to set the current properties as the default.

#### Changing the appearances of comments in the Format panel

When you select a comment tool or an existing comment, the Format panel will be

displayed on the right of the document pane. If necessary, you can drag the left border of the **Format** panel to slightly adjust the width, or click on anywhere along the left border to hide the **Format** panel. Foxit PDF Reader will remember the display status of the **Format** panel and keep it as it is until you re-adjust it manually. To re-display the **Format** panel after it has been hidden or closed, please click on its left border

again, or click the **Display comment format panel** icon on the floating toolbar of an existing comment.

- In the **Format** panel, you will find a preview box for you to preview the comment instantly while changing the appearance. And you will also find the following groups based on the comment or comment tool you have selected:
  - Comment Type> Style (e.g. Shape Style): Change the line color, width, opacity, and more. You can pick a preset style from the panel, or click to modify the preset style or customize a new style.
  - Faxt Style: Set the font, font color, font style, font size, text alignment, character spacing, etc. This group is available for text comments added by Typewriter, Callout, or Textbox tool. The font style options in the **Text Style** group are also available when you add text in comment pop-up notes.
  - Note Style/File Style: Change the icon for Note comments or file attachments (added as comments), and the color and opacity for the icon. You can pick a preset style from the panel, or click to modify the preset style or customize a new style.
  - Arrange: Center, align or distribute the selected comments. For more information, please refer to "Arrange the measurement markups through the Format panel"
- When completed, click the **Close** button 🗵 to close the **Format** panel.

#### **Setting Current Properties as Default**

Foxit PDF Reader allows you to set current properties of any comment as the default for preference. For example, when you set the color or opacity of the Highlight command, you can right-click the highlighted contents and choose **Set Current Properties as Default** in the drop-down menu. When you highlight the contents next time, the color and opacity you set before will be applied.

To set current properties as default, please do one of the follows:

- Right-click the comment in the PDF and choose **Set Current Properties as Default** in the drop-down menu.
- Choose Options on the popups of the comment, and click Set Current Properties as Default from the drop-down window.

Right click the comment and choose Properties, then check the Set Current Properties as Default option at the bottom of the Properties dialog box.

# **Replying to Comments**

Replying to comments is useful in shared reviews, when participants can read each other's comments. They can also be used by review initiators to let reviewers know how their suggestions are being implemented. All replies appear in the pop-up note and Comments panel, and are listed below the original comment. You can view the respective reply with the reply title and mark. See also About About pop-up Notes.

### Replying to Comments in the Pop-up Note

#### 1. Replying to original comments

- Using the Hand command, Select Annotation command, or the corresponding comment command > open the pop-up note for the comment.
- Right-click the original comment and select Reply, or right-click the comment icon and select Reply.
- Type your reply in the text box that appears in the pop-up window.

#### 2. Responding to other reviewers' comments

- Using the Hand command, Select Annotation command, or the corresponding comment command > open the pop-up note for the comment.
- Right-click title bar of the reply window and select **Reply to this Reply**.
- Type in your comments in the text box that appears next to the reviewer's comment.

#### Replying to Comments in the Comments List

- Choose View > View Setting > Navigation Panels > Comments (or click the
   Comments icon in the navigation panel) to open the Comments panel if it is hidden.
- In the Comments panel, select the comment and click on the **Add Reply** text field (or right-click the comment and choose **Reply**) to activate the **Add Reply** box.
- Input your reply in the box and click **OK**.

#### **Deleting the Reply Message**

To delete the reply message, please do one of the following:

- In the note pop-up window, right-click the title bar of the reply window, and click **Delete this Reply**.
- In the Comments panel, right-click the reply message, and click **Delete**.

**Note:** Right-click the comment icon and select **Delete** to remove this markup.

### **Summarizing Comments**

Summarizing comments is an easy way to obtain a synopsis of the text associated with the PDF. You can create a new PDF with summarizing comments; basically a comments summary that can be sorted by page, author, date or type to satisfy different requirements. You can also set properties for new documents, such as paper size, margin, page range, and font size, in the **Create Comment Summary** dialog box.

- Choose Comment > Summarize Comments.
- 2. In **Create Comment Summary** dialog box, please do the following:
  - Select how you prefer to create your comment summary.
  - Select Comment Type, such as All, Text, Line.
  - Choose paper size, such as A4, A3.
  - Choose font size and how to sort comments.
  - Specify page range.
  - Choose the color and opacity of the Connector Line (only available when you choose to create document and comments with connector lines.)
- 3. Click **OK** and the comments will be summarized in a new PDF. You can save the new PDF if you need.

# **Importing & Exporting Comments**

Please refer to "Importing & Exporting Comments Data".

# **Printing Comments**

Foxit PDF Reader allows users to print the document together with the content of the attached notes.

To print a summary of comments, please choose **File** > **Print** > click **Summarize Comments**. A window will pop up asking you whether to print the summarized comments in the current document, click **Yes** to continue.

To print comment contents in the pop-up notes right aside the original text, please check **Print notes and pop-ups** option in **File** > **Preferences** > **Commenting**, and then choose

**File** > **Print**. Make sure that you have selected the **Document and markups** option in **Print What** group in the **Print** dialog box, and click **OK** to print it.

### **Sending Annotated PDFs**

Foxit PDF Reader makes it easy for users to share reviews. You can send your annotated PDFs to any reviewers to see and respond to your comments.

To send an annotated PDF file, do the following:

- Click on the **Save** button to save all the comments you have made.
- Go to **Share** > **Email** > **Email Current Tab** or **Email All Open Tabs**. You can also click the **Email Current Tab** icon on the Quick Access Toolbar or press the shortcut keys **Ctrl** + **Shift** + **L** to email the annotated PDF file that is in the current view.

### Shared Review & Email Review

#### **About PDF Review**

Foxit PDF Reader supports two kinds of PDF review: shared review and email review. With Foxit PDF Reader, you can easily join a PDF view, share the comments, and track reviews. In a shared review, you can make comments, share and track reviews via a server. While in an email review, you can make comments and send the reviewed PDF back to the initiator as an email attachment.

# Join a shared review

- > Download the PDF file to be reviewed from your email application, and open it with Foxit PDF Reader.
- If you open the PDF to be reviewed with Foxit PDF Reader for the first time, you need to complete your identity information first.
- Add comments as needed in PDF.
- Upon completion, click **Publish Comments** in the message bar (if notification message is enabled) or click **Share** > **Manage Shared Review** > **Publish Comments** to share your comments with other reviewers.
- > Save the PDF by one of the following methods:

- Choose File > Save As to save the shared PDF as a copy in your local disk. You can reopen this copy to continue review or send to other reviewers for further shared review.
- Click Menu in the message bar and choose Save as Archive Copy (if notification message is enabled) or click Share > Manage Shared Review > Save an Archive Copy to save the PDF as a copy that is no longer connected to the shared review.

During the shared review, Foxit PDF Reader will automatically synchronize and display new comments every five minutes by default, and will notify you by flashing the Foxit PDF Reader icon in the taskbar whenever there are any new comments. You can also click on **Check for New Comments** in the message bar (if notification message is enabled) or click **Share** > **Manage Shared Review** > **Check for New Comments** to check for new comments manually. Or set the time interval in the reviewing preferences to check for new comments automatically in a specified time period. See also "Automatically Check for New Comments".

### Join an email review

- > Open the PDF file to be reviewed from your email application.
- > Add comments as needed in the PDF.
- Upon completion, click **Send Comments** in the message bar (if notification message is enabled) or choose **Share > Manage Email Review > Send Comments** to send the reviewed PDF back to the initiator via email.
- (If necessary) Choose **File** > **Save As** to save the PDF as a copy in your local disk.

# Rejoin a review

- > Reopen the PDF to be reviewed by one of the following methods:
  - ♦ Open the PDF copy directly if you have saved it in your local disk before.
  - Choose Share > Tracker or File > Share > Tracker > Tracker, right click the PDF you want to review, and choose Open from the context menu.
  - ♦ Open it from your email application.
- Follow the same steps specified above to continue a shared review or email review.

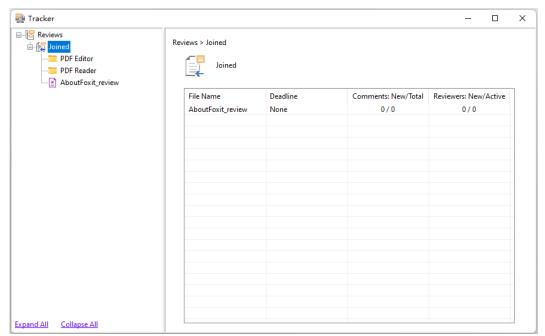
**Note**: To open the PDF to be reviewed from your email application with Foxit PDF Reader, you may need to install the email application that is configured to work with Foxit PDF Reader. Currently, Foxit PDF Reader supports the most popular email applications, including Microsoft Outlook, Gmail, Windows Mail, Yahoo Mail, and others. For email applications or webmail that do not work with Foxit PDF Reader, you can download the PDF first, and then open it for review from your local disk.

#### **Track Reviews**

Foxit PDF Reader provides a tracker to help you track reviews easily. Choose **Share** > **Tracker** or **File** > **Share** > **Tracker** > **Tracker**, and then you can view the file name, deadline, number of comments, and the list of reviewers for the shared reviews or email reviews you have joined.

In the **Tracker** window, you can also categorize your currently joined reviews by folders to find reviews easily. Steps are as follows:

- To create a new folder in the tracker, right-click **Joined** group or any review listed under the **Joined** group > choose **Create New Folder** > enter the name for the new folder > click **OK**.
- To list a review in your created folder, right-click the review, select **Send to Folder**, and choose the folder to which you want to move the review. To change the folder for a review, redo the operation, and choose the desired folder from the **Send to Folder** context menu. The **Top Level** option in **Send to Folder** context menu allows you to move the selected review out of its current folder, and list it in the **Joined** group.
- > To remove a created folder from the tracker, right-click the folder, and choose **Remove Folder from Tracker**. Please note that removing a folder from the tracker will remove all the reviews listed under it.



# Collaborate on Shared PDFs in Real-Time

For a PDF file that is shared via Link/Email using Foxit PDF Editor, Foxit PDF Reader users can join the online collaboration to add and reply to comments in real-time. *Note:* An *Internet connection and Foxit account signed-in are required to use this collaboration feature.* 

# Join a Collaborative Review

Follow one of the steps below to join review based on how the PDF file is shared.

- If you receive the file link, click the link to open the shared PDF file in Foxit PDF Editor Cloud in your default web browser to review the document after logging in to Foxit Account. When the shared file is opened in Foxit PDF Editor Cloud, you can also click **Open in Foxit** on Title Bar and choose **Open in Foxit PDF Reader** to open the shared file in Foxit PDF Reader on your desktop for collaboration.
- If you receive the review invitation email, click the **Open in Foxit PDF Editor Cloud** button in the email to open the file in Foxit PDF Editor Cloud and review the document. Alternatively, you can click **Share** > **Shared Files** to find the shared file in the **Shared by others** tab for collaboration. You can perform additional operations after clicking the three-dot icon ••• above the document pane of Foxit PDF Reader, such as viewing activities and copying the shared link. To leave a review, you can choose **Remove Me** from the menu.

# **Manage Shared Files**

You may be involved with multiple reviews during daily document workflows. Foxit PDF Reader's Share feature provides an easy way for document collaboration, but it also enables document reviewers to manage shared files in an organized way and track the review status with notifications.

To manage the shared files, do the following:

- 1. Click Share > Shared Files.
- On the Shared Files page, all files you shared using Foxit PDF Editor and all files that
  are shared to you by others are listed in the Shared by me tab and the Shared by
  others tab, respectively.
- 3. In the file list, you can view detailed information about the shared file, such as reviewers, review status, and more. You can also search for a shared file if you are handling multiple document reviews. Perform operations like viewing review activities and leaving the review as needed.

You get notified when others perform actions on the shared documents. You receive messages about review activities and can view the messages in the notifications box that

appears after you click the Notification icon (a bell icon) on Title Bar of Foxit PDF Reader. A red dot appears on the Notification icon if you have any pending messages. You can quickly mark all notifications in the box as read by clicking the horizontal three-dot icon in the upper-right corner of the box and selecting **Mark all as read** from the drop-down menu. To delete all notifications, choose **Delete all** from the menu.

# Chapter 6 - Form

Foxit PDF Reader is extremely useful for form filling and form designing. Please read below for more information.

### **General Information**

There are two kinds of "form" files. First, is a PDF file with fillable fields, which enables you to fill the form directly by clicking the form fields. This is called an *Interactive PDF Form*. The other kind of form is a plain PDF file with lines and texts, which can be filled using the tools in the **Fill & Sign** context tab (or the **Foxit eSign** tab). This is called a *Non-interactive PDF Form*.

You will need to navigate and adjust views of a form in the exact same way that you do in ordinary PDFs.

#### **Interactive Form**

When opening an interactive form, you will see a notification message appear on the top right corner of the document pane. The notification message informs you that the document contains interactive form fields. Click to collapse the notification message. If you do not want to see the notification message again when reopening this file, check **Don't show again** option in the notification message. Clicking the gear icon in the notification message can change the preferences about notification message setting. Please refer to Notification Messages preferences for more information.



#### XFA (XML Forms Architecture) Form

With Foxit PDF Reader, you can fill in <u>XFA forms</u> with the Hand command, the same way you are able to do with normal fillable forms (also known as AcroForm).

See also "Setting Form Display Preferences".

#### **Non-interactive Form**

This kind of form acts like an ordinary PDF document that has plain text and you will need to use the tools in the **Fill & Sign** context tab (or the **Foxit eSign** tab) to fill in this form. For more information, please refer to "Filling Non-interactive Forms".

# **Filling in PDF Forms**

PDF form operation: Foxit PDF Reader allows you to fill in PDF forms and print them out. These basic features are free for both personal and non-personal use. Foxit PDF Reader also supports advanced form operations, such as saving filled-out forms and importing/exporting forms.

# **Filling Interactive Forms**

If a PDF form contains interactive form fields, you can fill them in with the Hand command. Form fields are highlighted in light blue by default in Foxit PDF Reader so that you can easily identify them while filling forms. If you do not want to highlight form fields, please uncheck the **Highlight Fields** option in **Form > Tool Setting**, or go to **File > Preferences > Forms** and uncheck **Highlight all fields**. Before filling in an interactive form, you can also enable auto-complete feature so that Foxit PDF Reader can store your entries and provide relevant suggestions to help you complete forms quickly and easily. For more information about auto-complete, please refer to "Auto-Complete in Forms Preferences". When you place the pointer over an interactive form field, the pointer icon changes to one of the following:

- Pointing Finger ( -- Appears when the pointer is over a button, radio button, check box, or item on a list.
- Arrow -- Appears when you can select an item in a list of options.
- ullet I-beam icon  $oxed{1}$  -- Appears when you can type text into the form field.

#### To fill in an interactive form, please do the following:

- If necessary, select the Hand command.
- Click in the first form field you want to fill in, either to select that option or to place an I-beam pointer  $\mathbf{I}$  in the field so that you can start typing.
- For a text field, you can right-click it and choose the corresponding option from the context menu to perform more operations, including setting the text style, copying,

cutting or pasting text, etc. (*Tip: Setting the text style is only available for text fields that allow rich text formatting.*)

- After making a selection or entering text, do any of the following:
  - A. Press Tab or Shift + Tab to accept the form field change and go to the next or previous field.
  - B. Press the Up arrow key to select the previous option in an item of list, or press the Down arrow key to select the next option.
  - C. Press **ESC** to clear your current inputs and restore to the last entries.

**Note:** If the current form field is a single-line text box, you can press **Enter** to accept your text, which will deselect the field. You cannot start a new line in the text box. If the current field is a check box, pressing **Enter** or Space bar turns the check box on or off. In a multiline text form field, pressing **Enter** creates a paragraph return in the same form field.

- After you fill in the form fields, do one of the following:
  - A. Click the submit button if one exists. Clicking this button sends the form data to a database across the web or over your company intranet.
  - B. Click the **Save** icon on the toolbar, or choose **File** > **Save**.
  - C. Choose **File** > **Save As**, and specify a location for the copy.

**Note:** If the form author gave user extended rights, the saved copy will include the entries you made in the forms. Otherwise, the saved copy will be blank.

Print the form.

#### Clearing a form entry

Click one of the form fields, and use the **Backspace** key or **Delete** key.

#### **Clearing Unsaved Form Entries**

Choose Form > Reset form.

#### **Filling Lengthy Entries in Forms**

Some PDF forms can contain dynamic text fields, which change the text you input in size to accommodate the text fields. The text appears smaller and smaller when the words you type exceed the current size of the field. When you're finished typing and the field is deactivated, the text field displays all of the typed text in a smaller size.

#### **Spell-checking Form Entries**

You can spell-check the text you type in form fields or Form Designer if the security settings allow.

If you have enabled spell checking, when you insert any English text in the form fields, the spelling errors will be highlighted, and underlined with squiggly lines.

To spell-check entries, do the following:

- Right-click on the misspelled words, and you will see a list of suggested words.
- Choose one of the suggested words to correct your input or ignore the squiggly line.
- If all the suggested words are not the exact words you want to input, try to correct them with other words.

# Filling non-interactive forms

You can use the tools in the **Fill & Sign** context tab (or the **Foxit eSign** tab) to add text and symbols in non-interactive PDF forms. Foxit PDF Reader will intelligently detect the suspected fillable area and highlight it with a blue rectangle as your mouse moves over the page with a form filling tool selected, which helps you find out the fillable area and fill in non-interactive forms easily. To fill in non-interactive forms, follow the steps below.

- Click **Foxit eSign**, or **Home/Protect** > **Fill & Sign**. Then you will find the form filling tools in the **Foxit eSign** tab or **Fill & Sign** context tab.
- To add normal text, select **Add Text**. Then click on the form where you want to add text, and input your text.
- To add text in continuous boxes in a line, select **Comb Field**. Then click on the form where you want to add text, and input your text. The comb field will spread text evenly across the width of the text field, which is very useful when you are filling in phone numbers, social security numbers, etc.
- To add predefined text such as name, date or address, click **Predefined Text**, and do the following:
  - By default, Foxit PDF Reader will detect and display the current date and user name of your system in the predefined text list. If you want to predefine custom text, click **Set Predefined Text**. In the pop-up **Set Predefined Text** dialog box, click **Set Identity** to set your identity information, and save it as predefined text. Or double-click on the blank area in the box to input any text as desired. Upon completion, click **OK** to save your settings. Then all your custom predefined text will be listed in the **Predefined Text** drop-down list.
  - > Select a predefined text from the **Predefined Text** drop-down list, and click on the form where you want to add it.
- To add symbols, do the following:
  - > Select the Checkmark, Cross Mark, or Dot tool to fill in check boxes or radio buttons. Select the Line tool to strike out text, or Rectangle tool to add rectangles.
  - Then click on the form where you want to place the symbol.

- After adding text or symbols, use the field toolbar floating above them to make appropriate changes, if necessary.
  - Click A- or A+ to decrease or increase the size. For symbols, you can also drag any of the handles to resize it. For comb fields, dragging the resize handle on the right side of the field can also help you adjust the width of the field. The adjustments to size will be remembered and applied as the default.
  - > To change the color, click the **Switch color** icon , or press **Shift** + **L**. From the color palette, you can pick a preset color, or click to customize a new one.
  - To convert a normal text field into a comb field or vice versa, click the Comb Field icon

    AB or Add Text icon Correspondingly.
  - > To replace the current text or symbol, click ••• , and choose a desired option from the toolbar.
  - To move the text or symbol, drag it directly to the desired location.
  - > To delete the text or symbol, click \_\_\_\_\_\_.
- After filling in the form, you can sign the form with your handwritten signature. For more information, please refer to "Foxit eSign" and "Quick PDF Sign".
- When you have completed the form, click the **Save** button or choose **File** > **Save** to save it.

Tip: The fill tool will be kept as selected by default for you to add the same object continuously. If you need to exit the fill tool, press the **ESC** key, or select another desired tool directly.

# **Commenting on Forms**

You can comment on PDF forms, just like on any other PDF. You can add comments only when the form creator has extended rights to the users.

See also "Comments".

# **Importing & Exporting Form Data**

Please refer to "Importing & Exporting Form Data".

# **Chapter 7 - Data Import & Export**

Data in PDFs can be imported and exported to FDF files. FDF, short for Forms Data Format, a file format used for interactive form data, is used when submitting form data to a server, receiving the response, and incorporating it into the interactive form. It can also be used to export form data to stand-alone files that can be stored, transmitted electronically, and imported back into the corresponding PDF interactive form. In addition, FDF can be used to define a container for annotations that are separate from the PDF document to which they apply. Or sometimes, when you have to send a PDF file to others but do not want them to see your comments and form data, you may export all the data with this function, clear the file, and send it to others. In this way, all the data you added can be removed.

There are two kinds of data that can be imported and exported: comment data and form data. You can also send the comment data or form data as a FDF file to your clients or friends. The FDF does not only save all the data contents of the PDF documents, but also remembers their specific positions and statuses in the files.

## **Importing & Exporting Comments Data**

This feature is especially useful for PDF reviewing. When you receive an email invitation to a PDF review, the invitation typically includes the PDF as an attachment or provides a URL to the PDF. Alternatively, you may receive a Form Data Format (FDF) attachment. When opened, a FDF file configures your review settings and opens the PDF in Foxit PDF Reader. At this moment, you need to know how to import the comment data from the FDF file. Similarly, you may export comment data and send them as a FDF file to other participants.

**Tip:** The users of Foxit PDF Reader can import the comments data from FDF, XFDF and PDF files. You can also export the comments data in FDF format and email as an attachment.

#### **Importing Comments Data**

Do either of the following:

- Double-click a FDF file to open it directly with Foxit PDF Reader. (Note: Make sure the
  original PDF document associated with the comments data is not moved, renamed, or
  deleted after the comments data were exported to the FDF file.)
- Open the PDF document where you want to import comments data. Choose
   Comment > Import > navigate to where the desired file is, select it (if you want to
   import multiple comments file, you can select them by holding Ctrl/Shift or by
   dragging the mouse to select), and press "Open". You will be prompted that the
   comments data has been imported successfully.

#### **Exporting Comments Data**

To export comments data, please do one of the following;

- To export all comments or selected comments as an FDF file or XFDF file
  - A. Choose **Comment > Export > All Comments**, or select comments you want to export and then click **Comment > Export > Selected Comments**.
  - B. You will be presented with a standard Windows **Save As** dialog. From the **Save as type** drop-down list, select the file type (FDF or XFDF Files) that you want to save the exported data. Navigate to where you want to save the FDF file (e.g., your Documents folder), write its name, and click the **Save** button.
  - C. You will be prompted that the data has been exported successfully.
- To export all comments as an FDF file and send in an e-mail
  - A. Choose **Comment** > **FDF** via **Email**.
  - B. A blank message with the created FDF file included as an attachment will automatically open in your default e-mail program, and the current file name will be the email subject.
  - C. Type the e-mail address of users you want to receive the file > click **Send**.
  - D. The comments in FDF will be sent separately.
- To export highlighted text as an TXT or CSV file
  - A. Choose Comment > Export > Highlighted Text.
  - B. You will be presented with a standard Windows **Save As** dialog. From the **Save as type** drop-down list, select the file type (CSV Files or Text Files) that you want to save the exported data. Navigate to where you want to save the file, specify the file name, and click **Save**.
  - C. You will be prompted that the data has been exported successfully.

#### **Importing & Exporting Form Data**

Importing and exporting form data is similar to importing and exporting comment data. However, this function is only for PDF interactive forms. All the options for importing and exporting form data will be unavailable when you open other ordinary PDFs or non-interactive forms.

#### **Importing Form Data**

You can import form data to view the data submitted by an individual in the context of the PDF by opening the original form file and importing the data file in FDF, XML, XFDF, TXT, or CSV format. Steps as follow:

- > Open the PDF form into which you want to import the data with Foxit PDF Reader.
- Select Form > Import.
- You will be presented with a standard Windows **Open** dialog. Select the form data file that you want to import and click **Open**. If the form data file contains multiple groups of records, pick which record you want to import, and click **OK**. Upon completion, you will be prompted that the data has been imported successfully.

#### **Exporting Form Data**

To export the form data, please follow the steps below:

- > Select Form > Export > To File.
- In the **Save As** dialog box, specify the save path, name the file to be exported, and choose the desired file format in the **Save as type** field.
- Click Save to save the file.

#### **Export Form Data and Append It to an Existing Sheet**

To export the form data and append it to an existing sheet, please follow the steps below:

- Choose Form > Form to sheet > Append to an Existing Sheet.
- > In the **Open** dialog box, select the CSV file, and then click **Open**.

#### Combine Forms to a Sheet

To export multiple forms to a CSV file, please follow the steps below:

- > Choose Form > Form to sheet > Combine Forms to a Sheet.
- Click Add files in the Export multi-forms to a sheet dialog box.
- In the **Open** dialog box, select the file to be combined and click **Open** to add it to the current form.
- Alternatively, you can check **Contain forms you closed recently** to call out the forms you recently opened, then remove the files you don't want to add, and leave the ones to be exported in the list.
- If you want to append the form(s) to an existing file, check Append to an existing file.
- Click **Export** and save the CSV file in the desired path in the **Save As** dialog box.

# **Verify Signatures on XFA Forms**

Foxit PDF Reader allows you to verify the signature on XFA forms. Just click the signature on the PDF, and then you can check the signature validation status and properties in the pop-up windows.



# **Chapter 8 - Printing**

Printing is a process for reproducing text and images. When you have finished reading a helpful article or designing a PDF form, you may need to send it to an inkjet or laser printer and print it out with custom page sizes. With this section, you can get the help to set preferences in the Print dialog box to ensure that the finished document appears as intended.

## **Printing PDF Documents**

- Make sure you have installed the printer successfully.
- To print a single PDF document, open the PDF document with Foxit PDF Reader, and then do any of the following:
  - Click the **Print** button on the Ouick Access Toolbar.
  - Press the shortcut key Ctrl + P.
  - Choose File > Print.
- To print multiple PDF documents, open Foxit PDF Reader, and choose **File** > **Batch print**. In the **Batch Print** dialog box:
  - Click Add Files > Add Files/Add Folder/Add Open Files to add PDF files, folders that contain PDF files to be printed, or all the PDF files that are currently opened in Foxit PDF Reader. (Tip: In the Open dialog box popping up while adding PDF files, navigate through your local disk to select a local file, or click Open from ECM to select a file from your ECM server or cloud service after login).
  - After adding PDF documents, select a PDF document in the file list, and click **Page Range Options** to specify the page range and page order to be printed. Foxit PDF Reader allows users to print attachments in PDF format. Please check **Include all supported attachments** option in the **Page Range Options** dialog box if you need to print the attachments.
  - > (For printing opened PDF files only) If you only need to print the page in the current view of the opened PDF files, check **Set current page as print range for all opened files**.
  - In the **Files for printing** list, click **Move up** or **Move down** to change the printing order of the selected PDF document, or click **Remove** to remove the selected file from the list.
- Specify the printer and other printing options in the pop-up dialog box. For more information, please refer to "Print Dialog".
- Click **OK** to Print.

#### **Printing a Portion of a Page**

To print a portion of a page, you need to refer to the SnapShot command.

- Choose Home > SnapShot.
- Drag around the area you want to print.
- Right-click in the selected area > choose Print, and then refer to the Print dialog.

#### **Print Multiple Pages with Page Thumbnails**

To perform a quick print, you can select multiple pages from a document from the thumbnail list.

- Open the document that you want to print, and then click the Pages button on the left navigation pane.
- Shift-click / Ctrl-click/ drag the mouse to select a range of page thumbnails from the document.
- Select Print Pages from the right-click menu, and then click OK.

#### **Printing the Specified Pages or Sections**

Foxit PDF Reader allows you to print pages or sections associated with bookmarks directly from the Bookmark panel. Steps are as follows:

- Choose **View** > **View Setting** > **Navigation Panels** > **Bookmarks** or click the Bookmarks icon in the navigation panel to open the Bookmarks panel if it is hidden.
- In the Bookmarks panel, click to select a bookmark, or press **Shift** or **Ctrl** + **Click** to select multiple bookmarks.
- Right click the selected bookmark, choose Print Page (s) to print the pages where the
  selected bookmarks (including child bookmarks) are, or choose Print Section (s) to
  print all the pages in the bookmarked sections (including the child bookmarks).
- In the Print dialog box, specify the printer and other options as desired, and click OK.

**Note**: Bookmarks appear in a hierarchy, with parent bookmarks and child (dependent) bookmarks. If you print a parent bookmark, all page contents associated with the child bookmarks will also be printed.

#### **Print Optimization**

Print Optimization allows you to optimize print jobs from a PCL driver, for features such as font substitution or scanning for vertical and horizontal rules. Foxit PDF Reader provides an option to auto-detect printers that support PCL optimization, to improve printing speed. To enable print optimization, please follow the steps below:

- Choose File > Print to open Print dialog.
- Click **Advanced** at the top of the **Print** dialog.
- In the Advanced dialog, do the following:
  - Select a printer from the Printers list, and click Add to add the selected printer to the PCL Drivers list.
  - Check one of the optimization options (Use <PCL\_level> Driver for <PCL\_level> Printers option) based on your printer driver level.
  - Click OK.

Then you can begin printing with the optimized driver. And you can also remove the printer from the PCL Drivers list if you are not satisfied with the printing results it delivers. Just select the driver to be removed from the PCL Drivers list, click **Remove** and then choose **OK** to confirm the operation.

Tip: To enable PCL print optimization, please make sure that the **Use GDI+ Output for all types of printer** option in <u>printer preferences</u> is unchecked. Otherwise, settings in printer preferences will prevail and GDI++ device will be used for printing for all types of printers.

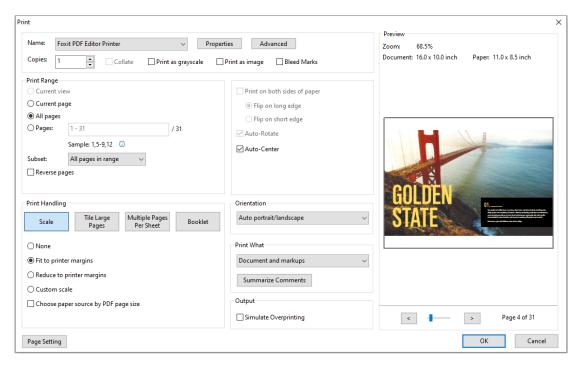
## **Print Dialog**

The Print dialog is the final step before printing. You can modify the printer in this dialog as well. Be aware that changing the printer may affect the page setup if the new selected printer has a different paper size, for instance.

The Print dialog allows you to make a number of changes about how your document prints. Follow the step-by-step descriptions in the **Print** dialog box.

To open the **Print** dialog box, do one of the following:

- Choose File > Print.
- Click the **Print** icon in the Quick Access Toolbar.
- Press Ctrl + P.
- Right-click the tab, and select **Print Current Tab** to print the current PDF file, or select **Print All Tabs** to print all the opened PDF files.



**The Print Dialog Box** 

- Name -- You can select your printer from the list of installed printers. To configure advanced options of the printer, click on the **Properties** button. This will display specific printer options.
- Advanced To set PCL Optimization to get optimized printing jobs. For more details, please refer to <u>Print Optimization</u>.
- Copies Sets the number of copies you want to print.
- Collate Assembles the printouts in a proper numerical or logical order when printing several copies. This option is checked by default and will be disabled when printing just one copy.
- Print as grayscale To print the PDF document with color images, texts, or other objects as shades of gray.

For example, RGB or CMYK image-only PDFs, in particular, can be quite large. Converting these PDFs to grayscale can reduce the size of the file and increase the printing speed.

- Print as image—To print the PDF document as an image.
- Bleed Marks Place a mark at each of the four corners of the bleed box to indicate the PDF bleed box boundaries.

 Print Range – This option lets you print different parts of a PDF document. You can specify to print all pages or only certain ones.

**Selected PDF files** – Prints the selected PDF files in a portfolio. This option is only available when you print PDF files in a portfolio in the portfolio preview mode.

**Current view** – Prints the page area (including text, comments, images, tables, or a combination of all of them) that is visible in the current view. This option is not available if your current view contains more than one page. If you have selected a portion of a page with the Snapshot tool, the **Current View** option will be dynamically replaced with the **Selected Graphic** option, which allows you to print the selected area.

**Current page** – Prints the page that is visible in the current view.

**All PDF files** – Prints all PDF files in a portfolio. This option is only available when you print PDF files in a portfolio in the portfolio preview mode.

All pages - Prints all pages of a PDF document.

**Pages -** Specifies the range of pages to print separate pages in the PDF. Enter page numbers and/or page ranges separated by commas. For example, 1,3,7-10. If your PDF contains formatted page numbers, and the **Use logical page numbers** option is enabled in **File > Preferences > Page Display**, you should enter the numbers that match the numbering on the pages rather than the physical page numbers. For instance, if you want to print the second page of your document which is numbered ii, you should enter ii to print the page. See also the preference setting on <u>logical page numbers</u>.

Subset – Provides options for setting noncontiguous page ranges.

**All Pages in range** – Prints all the pages within the specified range. **Odd pages only** – Prints only pages with odd numbers within the specified range. **Even pages only** – Prints only pages with even numbers within the specified range.

**Note:** This option is especially helpful for two-side printing.

- Reverse pages Prints pages in reverse order. If page ranges are entered, the pages
  print opposite of the order in which they were entered. For example, if you select to
  print the document from page 5 to page 30, selecting the Reverse pages option will
  print from page 30 to page 5.
- Scale Sets the scaling during printing, including the following five options:
  - A. None: Prints the pages without scaling.
  - B. Fit to Printer Margins: Scales small pages up and large pages down to fit the paper.
  - C. Reduce to Printer Margins: Reduces large pages to fit the paper.
  - D. Custom Scale: Resizes the pages by the percentage you specify.
  - E. Choose paper source by PDF page size: Automatically chooses paper source according to PDF page size.

- Tile Large Pages: To tile the pages which are larger than the selected paper size at a specified scale.
  - A. Page Zoom: Scales the pages by the percentage you specify.
  - B. Overlap: Sets the amount that each tile overlaps the adjacent tiles (unit: inch).
  - C. Cut Marks: Adds cut marks to each page to help you trim the overlap.
  - D. Labels: Adds the name of the document and page number on each tile.
- Multiple Pages Per Sheet: Allows you to print multiple pages in one sheet.
  - A. Pages per sheet: Choose a predefined number of pages or custom the number of pages to be printed in one sheet. If you select a predefined one from the dropdown menu, Foxit PDF Reader will automatically select the best paper orientation; otherwise, Foxit PDF Reader will let you define the properties as required.
  - B. Page Order: Defines how the pages are ordered on the paper, including Horizontal, Horizontal Reversed, Vertical and Vertical Reversed.
  - C. Margins: Sets the margins for printing.
  - D. Print Page Border: Check this option to print pages with a page border.
- Booklet: Allows you to print PDFs in booklet format.
  - A. Binding: Sets the binding direction, including Left and Right.
  - B. Booklet subset: Choose Front or Back if you only want to print one side of each sheet of paper, choose Both to print PDFs in double-sided booklet format.
  - C. Margins: Sets the margins for booklet printing.
- Print on both sides of paper (available only when the selected printer supports duplex printing)
  - A. Flip on long edge: Print the document where the paper flips along the long edge.
  - B. Flip on short edge: Print the document where the paper flips along the short edge.
- Auto-Rotate Adjusts the PDF document's orientation to match the orientation specified in the printer properties.
- Auto-Center Places the PDF pages in the center.
- Orientation

Selects a page orientation to print the document in. If **Auto portrait/landscape** is selected, the printer will automatically adjust the page orientation based on the page size and the paper size. For example, with the page height larger than the page width, the printer will print the page in portrait orientation, and vice versa. The **Choose paper source by PDF page size** option in **Page Handling** overrides the **Auto** 

#### portrait/landscape option here.

Tip: If you want to print a horizontal document vertically, or a vertical document horizontally, you should uncheck **Auto-Rotate** in case the document's orientation is adjusted automatically based on the paper orientation.

• Print What – Specifies to print documents only, annotations only, or both.

**Document** – Prints the document contents and form fields, not including annotations. **Document and markups** – Prints document contents, form fields, and annotations. If you also need to print notes and popups associated with comments, please make sure that you check the **Print notes and pop-ups** option in <u>Commenting Preferences</u>. **Document and stamps** – Prints all document contents, form fields, and stamps, not including other markups (like note comments).

**Form fields only** – Prints the interactive form fields only. **Annotations only** – Prints annotations only.

Output

Simulate Overprinting – Simulate the blending and overprinting of colors in the color-separated output.

- Page setting: Set up the orientation, page size, and page margins for printing PDF files.
   You can also specify the orientation and page size in the <u>Printer Properties</u> dialog box or <u>Orientation</u> setting in the Print dialog box. Those settings will keep synchronized across different dialog boxes or option groups. For the page orientation, the <u>Auto portrait/landscape</u> option in the <u>Orientation</u> setting in the Print dialog box takes precedence over the Portrait/Landscape setting in both the <u>Page Setting</u> dialog box and <u>Printer Properties</u> dialog box.
- Preview -- Foxit PDF Reader provides an instant preview in the Print dialog box.

You can use the magnification command as well as the navigation command on the print dialog box to preview the individual pages in desired magnification level. Both the document size and the paper size are shown in Preview.

**Tip:** To change the unit of page dimensions, please go to **File > Preferences > Measuring > Measurement Units**.

# Chapter 9 - Foxit Al Assistant\* (Available in Certain Regions)

Foxit PDF Reader's integration with ChatGPT takes advantage of Al-Generated Content (AlGC) to make end users more productive. It provides the following capabilities:

- Chat with Al Assistant Use natural language processing (NLP) to provide users with detailed responses to their questions in real-time.
- Chat about Document Analyze the document and answer user questions based on PDF content. Advanced options are available for documents with attachments, allowing for attachment analysis.
- Summarize Text/Document Generate a concise and accurate summary of a given text input or a document. It analyzes the content of the text and identifies the most important information to include in the summary, using natural language processing and machine learning algorithms.
- Enhance writing of the text Use machine learning to automatically paraphrase or rewrite text while maintaining its original meaning. This service is designed to help users generate new content from existing text, such as for content marketing, SEO, or simply to improve the clarity and readability of writing.
- Content Translation Translate selected text or entire documents into corresponding languages.
- Spelling and Grammar Correction Automatically detect and correct spelling and grammar errors in your content.
- Content Explanation Provide concise explanations and definitions for selected text.
- Smart PDF Commands Automatically execute the associated commands in Foxit PDF Reader based on users' inputs that indicate what tasks they want to perform.

\*20 lifetime credits per new user is included. Upgrade to 2000 credits per month Al Assistant Subscription available to purchase separately.

The AI services are enabled by default. If you want to disable the feature, choose **File** > **Preferences** > **General** > **Application Startup**, check **Disable AI Assistant** under **Application Startup**, and restart the application. When the AI services are enabled, you can do any of the following to access the AI services:

- Click **AI Assistant** on the ribbon.
- Select any text in your document and choose a tool from the floating toolbar to perform tasks.

**Tip**: You need to sign in with Foxit Account to use the AI services.

Foxit PDF Reader's Al Assistant, powered by ChatGPT, may produce inaccurate information about people, places, or facts. The Al Assistant's privacy policy aligns with <u>Data Privacy Policy for Azure OpenAl</u> and <u>Data Privacy Policy for Document Intelligence</u>. For more information on the Al Assistant's security, please refer to <u>Foxit Al Assistant Security Overview White Paper</u>.

# **Chapter 10 – Appendices**

This section is a collection of supplementary materials for this user manual, including Keyboard Shortcuts, Single-key Accelerators, and Command Lines.

# **Keyboard Shortcuts**

Keyboard shortcuts are keys or combinations of keys that provide an alternative way to perform actions that you'd typically do with a mouse. There are number of keyboard shortcuts that you can use to speed up your navigation within Foxit PDF Reader. You can both use the default keyboard shortcuts and customize your own shortcuts. For more information about customizing shortcuts, please refer to "Customizing Shortcut keys".

The following tables list the default keyboard shortcuts for the functions in different ribbon tabs.

#### The File tab

Action	Shortcut
Open File	Ctrl + O
Close File	Ctrl + W, or Ctrl + F4
Save As	Ctrl + Shift + S
Close All	Ctrl + Shift + W
Print Document	Ctrl + P
Exit Foxit PDF Reader	Ctrl + Q, or Alt+F4
Save	Ctrl + S
Document Properties	Ctrl + D
Preferences	Ctrl + K

#### The Home tab

Tool	Shortcut
Hand Tool	Alt + 3
Select Text and Image	Alt + 6
Snapshot	Alt + 7

Find Text (Go to the Find box in the top right corner of the application window to search document.)	Ctrl + F
Find Next	F3
Find Previous	Shift + F3
Open the <b>Search</b> panel	Ctrl + Shift + F
Zoom To	Ctrl + M
Zoom In	Ctrl + +
Zoom Out	Ctrl + -
Reflow	Ctrl + 4
Actual Size	Ctrl + 1
Fit to Page	Ctrl + 0
Fit Width	Ctrl + 2
Fit Visible	Ctrl + 3
Rotate Clockwise	Ctrl + Shift + Plus
Rotate Counterclockwise	Ctrl + Shift + Minus

#### The Comment tab

Result	Shortcut
Paste in Place	Ctrl + Alt + V
Pencil	Shift + P
Callout	Shift + C
Highlight	Shift + H
Insert Text	Shift + I
Replace Text	Ctrl + Shift + R
Squiggly Underline	Shift + U
Strikeout	Shift + S
Textbox	Shift + E
Typewriter	Shift + T
Underline	Ctrl + U
Export All Comments	Ctrl + L
Export Highlighted Text	Ctrl + I
Hide All Comments	Ctrl + Shift + 8

Show All Comments	Ctrl + 8
Note	Ctrl + Shift + N
Submit the reply after typing the reply	Ctrl + Enter
message in the <b>Comments</b> panel	

#### The View tab

Result	Shortcut
Full Screen	F11
Marquee Zoom	Alt + 5
Read Mode	Ctrl + H
Text Viewer	Ctrl + 6
AutoScroll	Ctrl + Shift + H
Stop AutoScroll	ESC
Rulers	Ctrl + R
Line Weights	Ctrl + 5
Read Current Page	Ctrl + Shift + V
Read from Current Page	Ctrl + Shift + B
Stop	Ctrl + Shift + E
Pause	Ctrl + Shift + P
Activate Read	Ctrl + Shift + Y
Show or hide Navigation pane	F4
Page Down	Space
Page Up	Shift + Space
Move left by a character	Left
Move right by a character	Right
Move left by a word	Ctrl + Left
Move right by a word	Ctrl + Right
Move up by a row	Up
Move down by a row	Down
Move to the end	End
Move to the beginning	Home
Move to the top of next page	Ctrl + Page Down

Move to the top of previous page	Ctrl + Page Up
Move to the end of the document	Ctrl + End
Move to the beginning of the document	Ctrl + Home

#### The Form tab

Result	Shortcut
Go to fillable field by tab order	Tab
Go to fillable field by tab in reversed order	Shift + Tab

#### The Share tab

Result	Shortcut
Email All Open Tabs	Ctrl + Shift + K
Email Current Tab	Ctrl + Shift + L

## The Help tab

Result	Shortcut
User Manual	F1

## The Format tab in the right panel and the floating toolbar

Result	Shortcut
Switch Color	Shift + L
Color 1	Shift + 1
Color 2	Shift + 2
Color 3	Shift + 3
Color 4	Shift + 4
Color 5	Shift + 5
Color 6	Shift + 6
Color 7	Shift + 7
Color 8	Shift + 8

Color 9	Shift + 9
Color 10	Shift + 0
Edit Note	Shift + O

## Others

Result	Shortcut
Сору	Ctrl + C, or Ctrl + Insert
Cut	Ctrl + X
Paste	Ctrl + V
Select All (Select all items in a document or window)	Ctrl + A
Deselect All	Ctrl + Shift + A
Collapse the Ribbon	Ctrl + F11
Undo (Undo an action)	Ctrl + Z
Redo (Redo or repeat an action)	Ctrl + Shift + Z
Move to next open document tab (when multiple documents are open in same window)	Ctrl + Tab, or Ctrl + Shift + Page Down
Move to previous open document tab (when multiple documents are open in same window)	Ctrl + Shift + Tab, or Ctrl + Shift + Page Up
Advanced Search	Ctrl + Shift + F
First Page	Ctrl + Home
Previous Page	Ctrl + Page Up
Next Page	Ctrl + Page Down
Last Page	End
Previous View	Alt + Left
Next View	Alt + Right
Go to Page	Ctrl + G
Preview page by page in Print Preview	Page Up/Down
Delete the word before the cursor's current position	Ctrl + Backspace
Expand the selected area to the next character on the right	Shift + Right

Expand the selected area to the next character on the left	Shift + Left
Expand the selected area to the end of a word	Ctrl + Shift + Right
Expand the selected area to the beginning of a word	Ctrl + Shift + Left
Expand the selected area to the end of a row	Shift + End
Expand the selected area to the beginning of a row	Shift + Home
Expand the selected area next Row	Shift + Down
Expand the selected area previous Row	Shift + Up
Expand the selected area to the beginning of a document	Ctrl + Shift + Home
Expand the selected area to the end of a document	Ctrl + Shift + End

# **Single-key Accelerators**

You can select some commands and perform some actions with single-key accelerators. To enable single-key accelerators, please go to **File** > **Preferences** > **General**, and check **Use single-key accelerators to access tools** option in the **Basic Tools** group.

#### **Keys for Selecting Commands**

Command	Single-key Accelerator
Hand	Н
Temporarily select Hand	Spacebar
Select Text and Image	V
Marquee/Loup/Magnifier	Z
Cycle through zoom commands: Marquee, Loupe, Magnifier	Shift + Z
Temporarily zoom out (when Marquee command is selected)	Ctrl
Temporarily select Zoom In	Ctrl+ Spacebar
Select Annotation	R

#### **Keys for Working with Comments**

Action	Single-key Accelerator
Sticky Note	S
Replace Text	Е
Stamp	К
Current highlighting command	U
Cycle through highlighting tools: Highlight, Underline, Strikeout	Shift + U
Current drawing markup command	D
Cycle through drawing markup commands: Cloud, Arrow, Line, Rectangle, Oval, Polygon Line, Polygon, Pencil, Eraser	Shift + D
Cloud	Q
Text Box	X
Current Stamp or Attach File command	J
Cycle through Stamp and Attach File	Shift + J
Move focus to next comment or form field	Tab
Move focus to previous comment or form field	Shift + Tab
Open pop-up note (or text field in Comments List) for comment that has focus	Enter
Close pop-up (or text field in Comments List) for comment that has focus	Esc

# **Keys for Navigating a PDF Document**

Action	Single-key Accelerator
Previous screen	Page Up
Next screen	Page Down
First page	Home
Last page	End
Previous page	Left Arrow or Ctrl + Page Up
Next page	Right Arrow or Ctrl + Page Down
Scroll up	Up Arrow
Scroll down	Down Arrow
Scroll (when Hand command is selected)	Spacebar
Zoom in	Ctrl+ Equal Sign

Zoom out	Ctrl + Hyphen
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## **Keys for Working with Forms**

Action	Single-key Accelerator
Highlight fields	Shift + L

## **Keys for Working with PDF Portfolios**

Action	Single-key Accelerator
Move focus to the next or previous row when in the body of the file list on the left	Up Arrow or Down Arrow
If pressed in the body of the file list, navigate one level up from within a folder	Backspace
If pressed when focus is on a row in the file list representing a subfolder, navigate to a subfolder, or open an attachment.	Enter
If in the body of the file list, move to the first or last row	Home or End
If in the body of the file list, move to the next or last set of rows to fit the screen	Page Down or Page Up
Select or deselect all files	Ctrl + A or Shift + Ctrl + A
If in the body of the file list, extend the selection by adding the next row above or below the selected row	Shift + Up Arrow or Shift + Down Arrow
Change whether the row with focus is in the selection	Ctrl + Spacebar
Move focus up or down one row without changing the selection	Ctrl + Up Arrow or Ctrl + Down Arrow

## **Keys for Navigating Task Panes**

Action	Single-key Accelerator
Navigate to the next item in the panel	Tab
Open or close the Task pane	Shift + F4

## **Keys for General Navigating**

Action	Single-key Accelerator
Move focus to Ribbon	F10
Move to next open document tab (when multiple documents are open in same window)	Ctrl + Tab, or Ctrl + Shift + Page Down
Move to previous open document tab (when multiple documents are open in same window)	Ctrl + Shift + Tab, or Ctrl + Shift + Page Up
Close current document	Ctrl + F4
Close all open documents	Ctrl + Shift + W
Move focus to document pane	F5
Move focus to next comment, link, or form field in the document pane	Tab
Move focus to previous comment, link, or form field in the document pane	Shift + Tab
Activate selected tool, item (such as a movie clip or bookmark), or command	Spacebar or Enter
Open context menu	Shift + F10
Close context menu	F10
Return to Hand command or Select command	Esc
Move focus to next tab in a tabbed dialog box	Ctrl + Tab
Move to previous search result and highlight it in the document	Shift + F3
Move to next search result and highlight it in the document	F3
Search previous document (with Search results displaying multiple files)	Alt + Shift + Left Arrow
Search next document (with Search results displaying multiple files)	Alt + Shift + Right Arrow
Select text (with Select command selected)	Shift + Arrow Keys
Select next word or deselect previous word (with Select command selected)	Shift + Ctrl + Right Arrow or Left Arrow

# **Keys for Working with Navigation Panels**

Action	Single-key Accelerator
Open and move focus to navigation pane	Ctrl + Shift + F5

Move focus among the document, status bar and navigation panels	F6
Move focus to previous pane or panel	Shift + F6
Move among the elements of the active navigation panel	Tab
Move to previous or next navigation panel and make it active (when focus is on the panel button)	Up Arrow or Down Arrow
Move to next navigation panel and make it active (when focus is anywhere in the navigation pane)	Ctrl + Tab
Expand the current bookmark (focus on Bookmarks panel)	Right Arrow, or * (keypad), or Plus Sign (keypad)
Collapse the current bookmark (focus on Bookmarks panel)	Left Arrow, or Minus Sign (keypad)
Expand all bookmarks	Shift + *
Collapse all bookmarks	Shift + Forward Slash (/) (keypad)
Move focus to next item in a navigation panel	Down Arrow
Move focus to previous item in a navigation panel	Up Arrow

## **Keys for Navigating the Help Window**

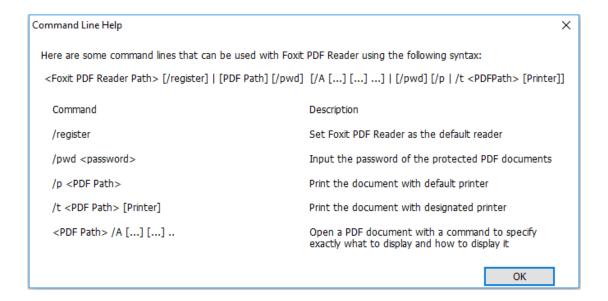
Action	Single-key Accelerator
Open User Manual	F1

## **Keys for Accessibility**

Action	Single-key Accelerator
Reflow a tagged PDF, and return to unreflowed view	Ctrl + 4
Activate and deactivate Read Out Loud	Shift + Ctrl + Y
Read only the current page out loud	Shift + Ctrl + V
Read out loud from the current page to the end of the document	Shift + Ctrl + B
Pause reading out loud	Shift + Ctrl + C
Stop reading out loud	Shift + Ctrl + E

#### **Command Lines**

Foxit PDF Reader defines parameters that allow you to perform operations on a PDF with a command. To check the command lines that can be used in Foxit PDF Reader, please go to **Help** > **Command Line Help**.



Command	Result
nameddest=destination	Jump to a named destination.
page=pagenum	Turn to the target page.
zoom=scale	Zoom the PDFs.
pagemode=bookmarks	Open the bookmark panel in the Navigation Pane.
pagemode=thumbs	Open the thumbnail panel in the Navigation Pane.
pagemode=layers	Open the layers panel in the Navigation Pane.
pagemode=none (default)	Close all the panels in the Navigation pane.
fdf="fdf path"	Open the FDF file.
toolbar=1 0	Show or Hide Tool Bar.
statusbar=1 0	Show or Hide Status Bar.
navpanes=1 0	Show or Hide Navigation Pane.
reverse=1/0	View pages in reverse or forward order.

# **Contact Us**

Feel free to contact us should you need any information or have any problems with our products. We are always here, ready to serve you better.

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