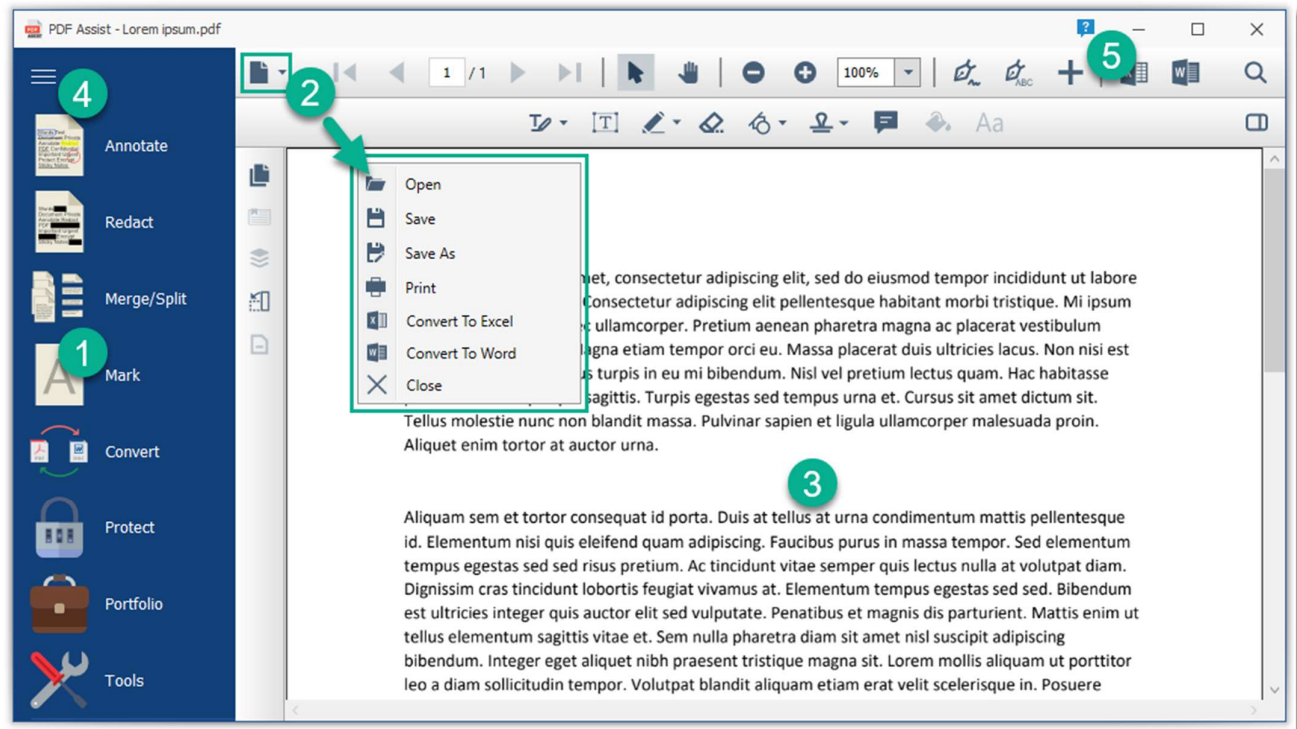




USER GUIDE



OVERVIEW



1

Choose which PDF Assist Tool you wish to use via the navigation menu

2

Use the File menu to Open, Save, Save As, Print and Close your PDF files

3

The selected tool or currently opened PDF file will appear here

4

You can minimize the navigation menu by clicking here

5

Quick access to this help file



TOOLBARS



1

File menu – use this to Open, Save, Save As, Print or Close your PDF file

2

Page navigation – move back / forward a page – go to first or last page, or jump to specified page

3

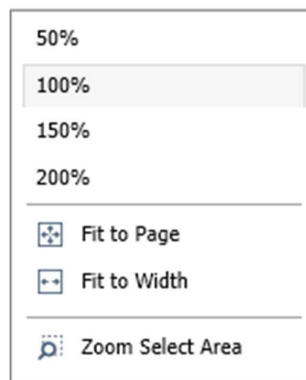
Selection tool for text

4

Click to pan around the document

5

Zoom +/- or use the drop-down menu to select a zoom percentage or to choose from Fit to Page, Fit to Width or to Zoom into a selected area of the page



6

Click to search PDF



1

Thumbnail view

2

View bookmarks

3

Layers

4

Rotate, rearrange or delete pages

5

Redaction tools

6

Form data



TOOLBARS



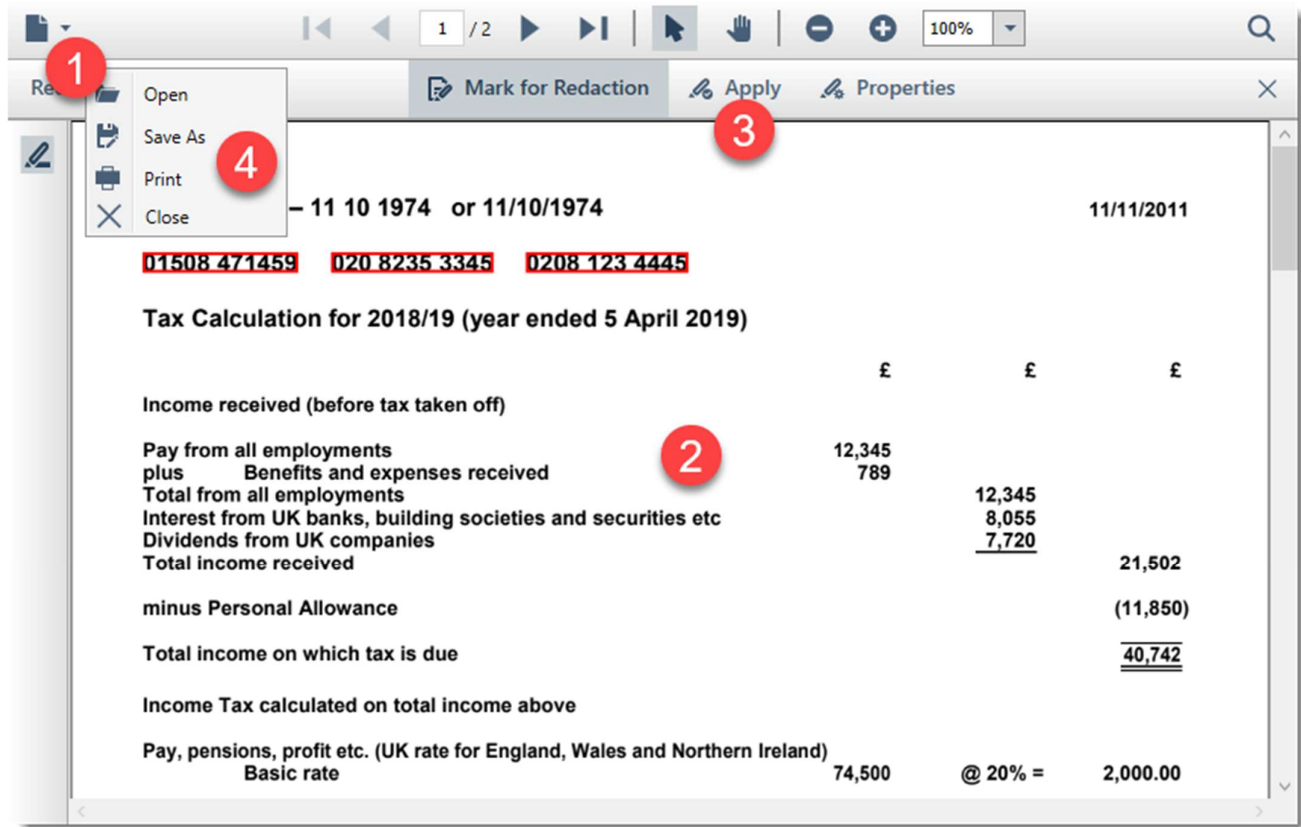
- 1 Sign document by drawing a signature
- 2 Sign document by adding text signature
- 3 Insert blank page
- 4 Convert current PDF to Excel (.XLSX) or Word (.DOCX)



- 1 Text markup – highlight / underline / strikethrough and squiggly text
- 2 Add text box
- 3 Draw free form
- 4 Erase free form drawing
- 5 Drawing tools – line / rectangle / circle / arrow / text callout and more
- 6 Add stamp
- 7 Add sticky note
- 8 Colour picker
- 9 Text properties
- 10 Comments panel



REDACT



1

Click File menu icon > Open to browse for and open a PDF file

Most areas which usually require redaction will automatically be marked for you with a red rectangle

Preselected areas can be unmarked by selecting them and pressing delete or via the right click context menu

2

Manually draw rectangles around any additional areas that need to be redacted

TIP: For smaller text it is recommended to draw a rectangle around the area to be redacted rather than trying to select the text. You can also zoom in to make it easier

As you move mouse pointer over redaction selection it previews what it will look like
Click **Apply**, and confirm you wish to apply the redactions

3

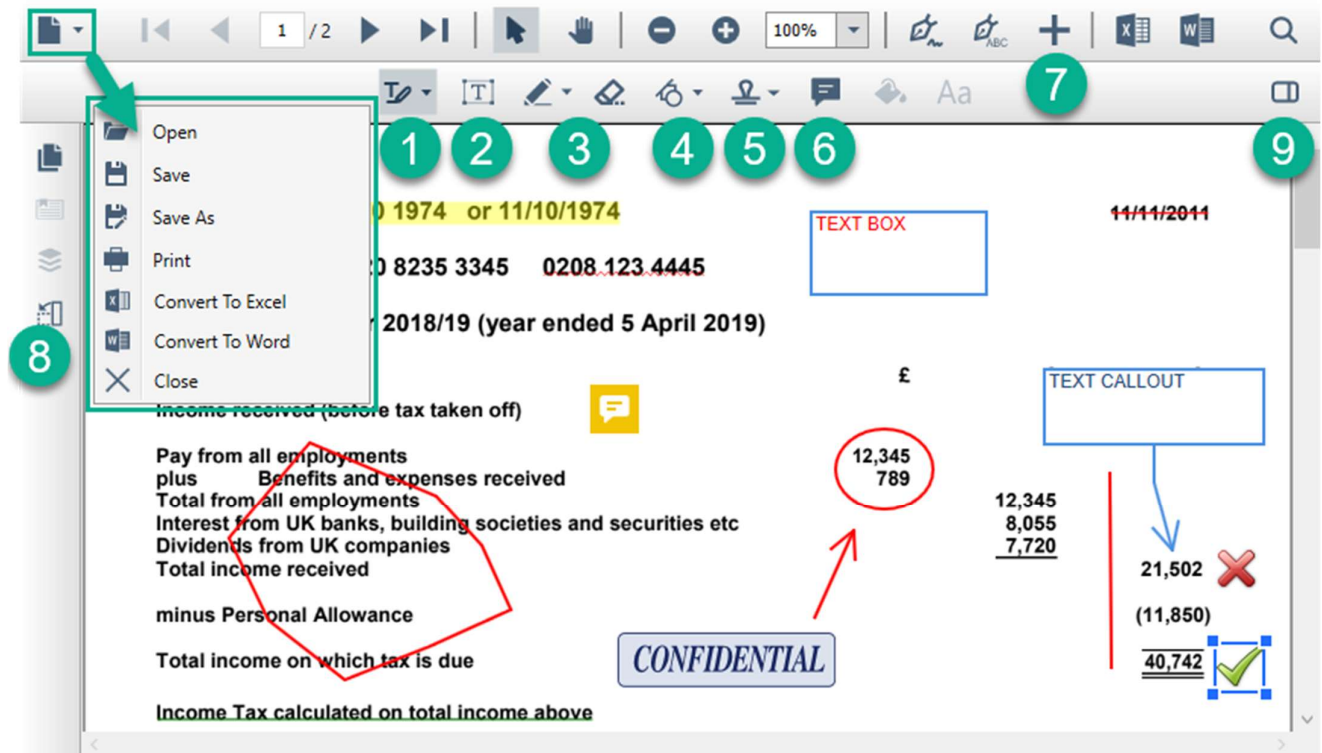
4

Click File menu icon > Save As to save the PDF file, for safety the file should be saved with a different name as redaction cannot be undone later

N.B. Areas are only pre-marked if the software can be confident that it meets the requirements, all redacted content should **always** be manually checked



ANNOTATE



1

Highlight, Underline, Strikethrough or Squiggly Underline text

TIP: If you wish to highlight smaller text, images or scanned documents then use the Rectangle drawing tool below which defaults to a yellow rectangle with opacity

2

Text box

3

Draw free form / Erase free form drawing

4

Drawing tools - Line, Rectangle, Circle, Arrow, Polygon, Polyline, Cloud & Text Callout

5

Stamps

TIP: Choose Custom Stamps > Add Stamp to use your own images

6

Sticky note – add notes to your PDF document, automatically labelled with your name

7

Insert blank page after current page

8

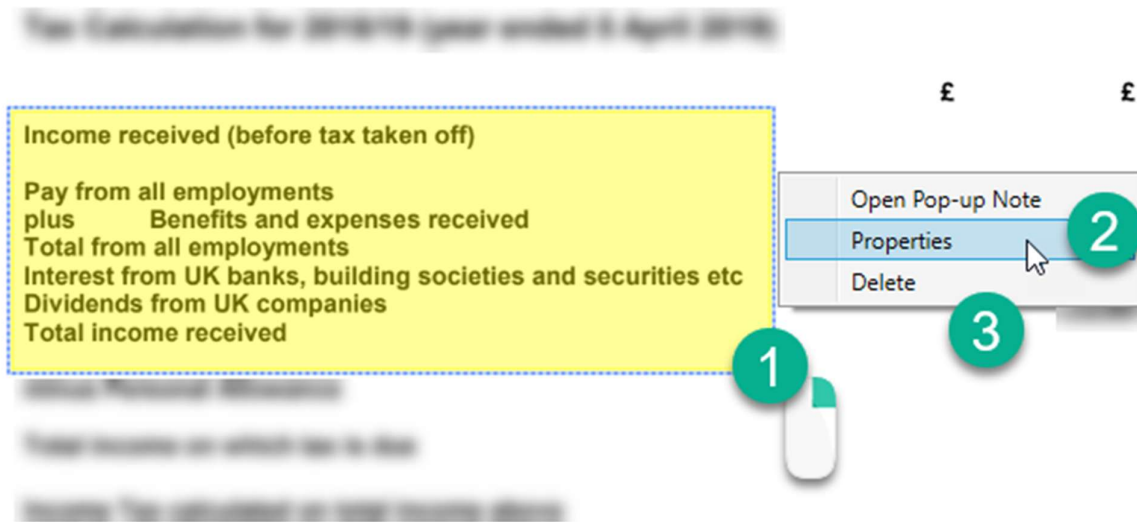
Rotate, rearrange or delete pages – use icons to delete/rotate, or drag to re-arrange

9

Show Comments Panel where you can quickly edit, comment or delete annotations



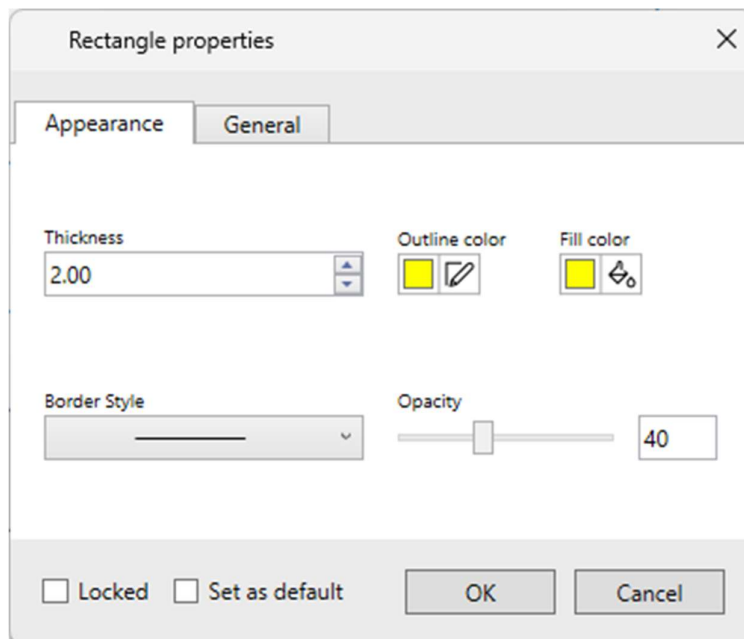
ANNOTATE



1 All annotation items can be edited by right mouse clicking on them

N.B. For shapes right click on the edge of the shape to show menu

2 Properties – shows the dialog box below where you can change outline / fill colours, line thickness, border style and opacity



3 Delete – removes the selected annotation from the PDF



ANNOTATE - SIGNATURE

There are two ways to insert a signature into your document



1

This will insert a text signature into your document using a default handwriting style font. The value used for the name can be set under Settings

Fred Bloggs

2

This opens a panel which allows you to write your signature and works well if you have a touch enabled device or stylus. It can also be used with a mouse if required

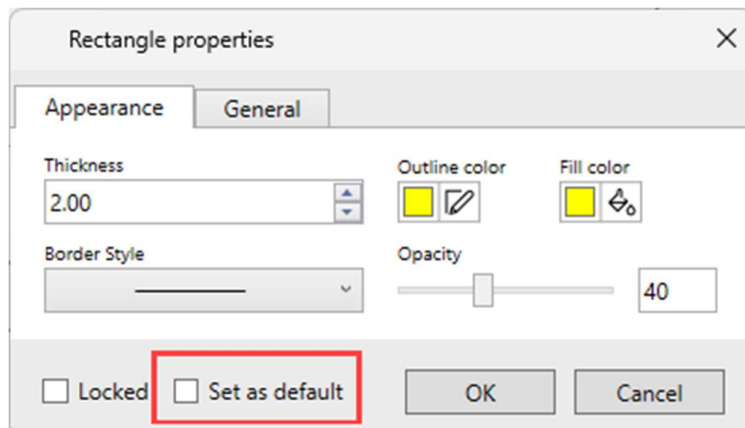
[Handwritten signature]



ANNOTATE – DEFAULT SETTINGS

All settings relating to the annotation tools e.g. border colours, background colours, border thickness, opacity (transparency), callout line endings, sticky note icons etc can be saved as defaults so that each time you open PDF Assist it remembers your chosen settings

When you make a change that you would like to save then check the **Set as default** box before clicking **OK**





ANNOTATE – PASTE TEXT / IMAGES

You can automatically insert a text box or a stamp using the content of your clipboard

When you press:

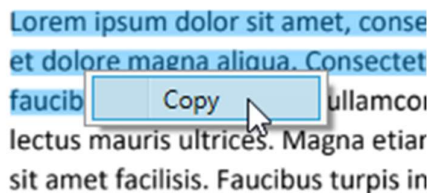


PDF Assist will automatically determine if the clipboard contains text or an image

If the clipboard contains text then a new text box will be added to the page for you containing the text, this can then be repositioned, resized, and edited as you require

If the clipboard contains an image then a new stamp will be added to the page containing the image (N.B. if the image on the clipboard is larger than the current page size then the stamp size will automatically be rescaled so it fits correctly on the page), again you can resize and reposition this as you require

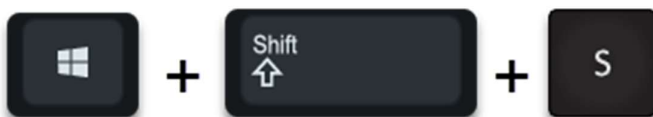
You can copy existing text from the page to the clipboard by selecting the text on the page and either right click on the selection and choose Copy



Or by pressing:



You can capture an image to the clipboard from any application by pressing:





ANNOTATE – CUT, COPY, PASTE

The following types of annotations can be cut, copied and pasted anywhere within your document:

- Text box
- Drawing tools (shapes and text callouts)
- Free form (ink)
- Stamps
- Sticky Notes

Select the annotation you wish to cut or copy and then use the keyboard shortcuts below:



Then move to the page / area where you wish to place the annotation and press:





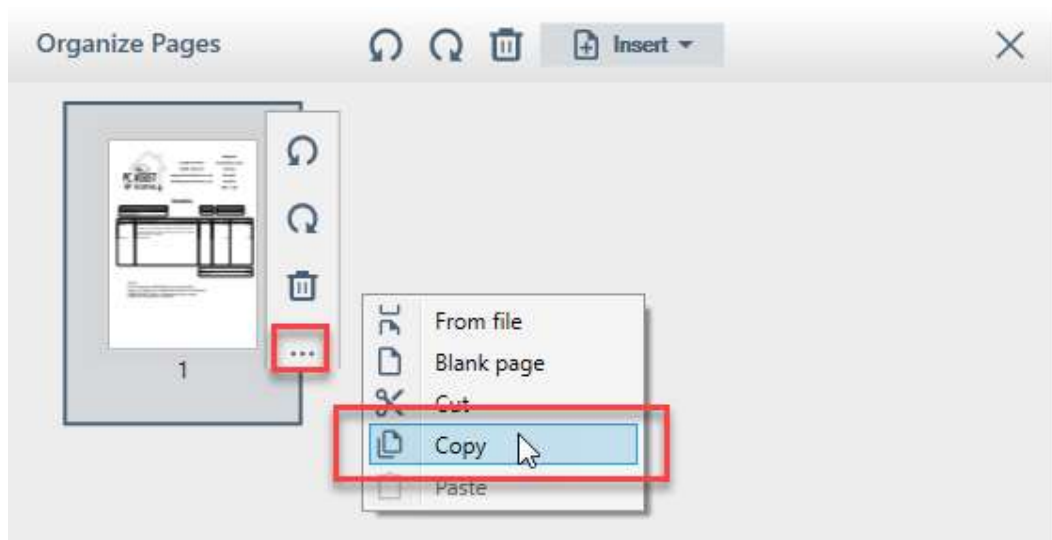
ANNOTATE – INSERT PAGES

You can insert pages into an existing PDF as follows:

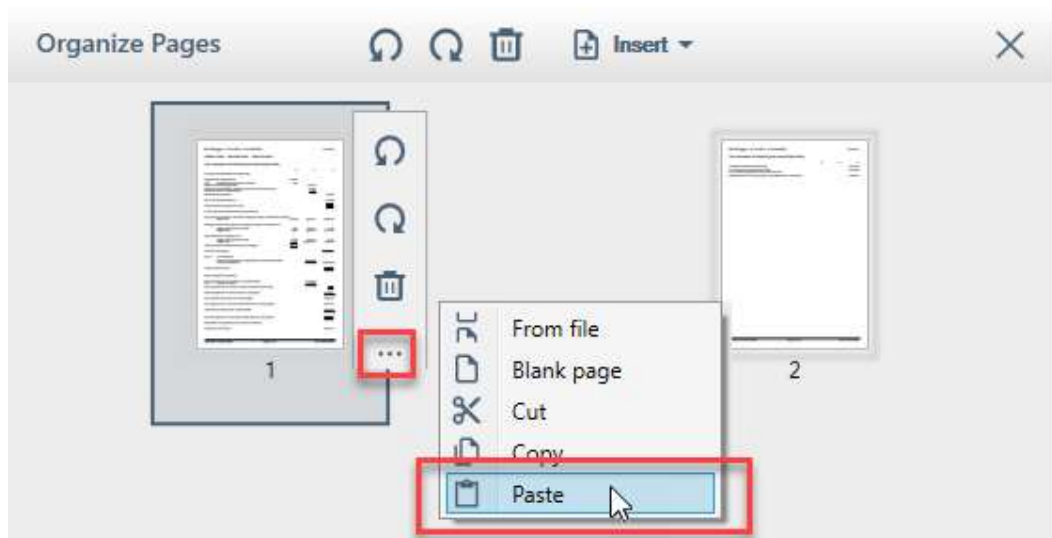
- 1) To copy individual pages from one PDF to another PDF:
 - a. Open the Organize Pages view in both PDF files as shown below



- b. Select the page you wish to copy and from the menu click ... and then **Copy**



- c. In the destination PDF select the page you wish to insert before and from menu click ... and then **Paste**





ANNOTATE – INSERT PAGES

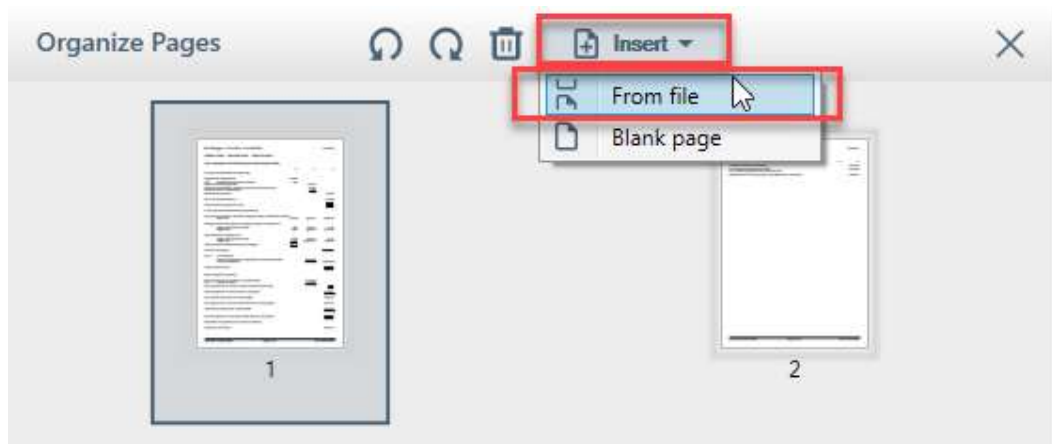
2) To insert all pages from another PDF file

a. Open the Organize Pages view as shown below



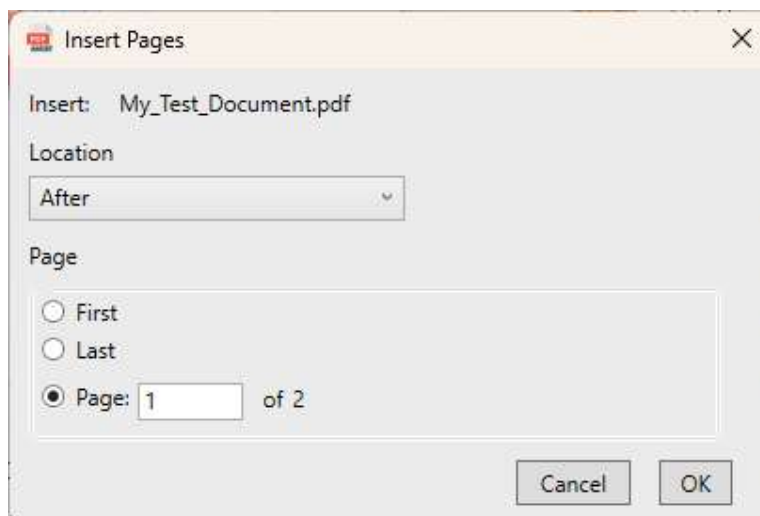
b. Select a page

c. Click **Insert** > **From file**



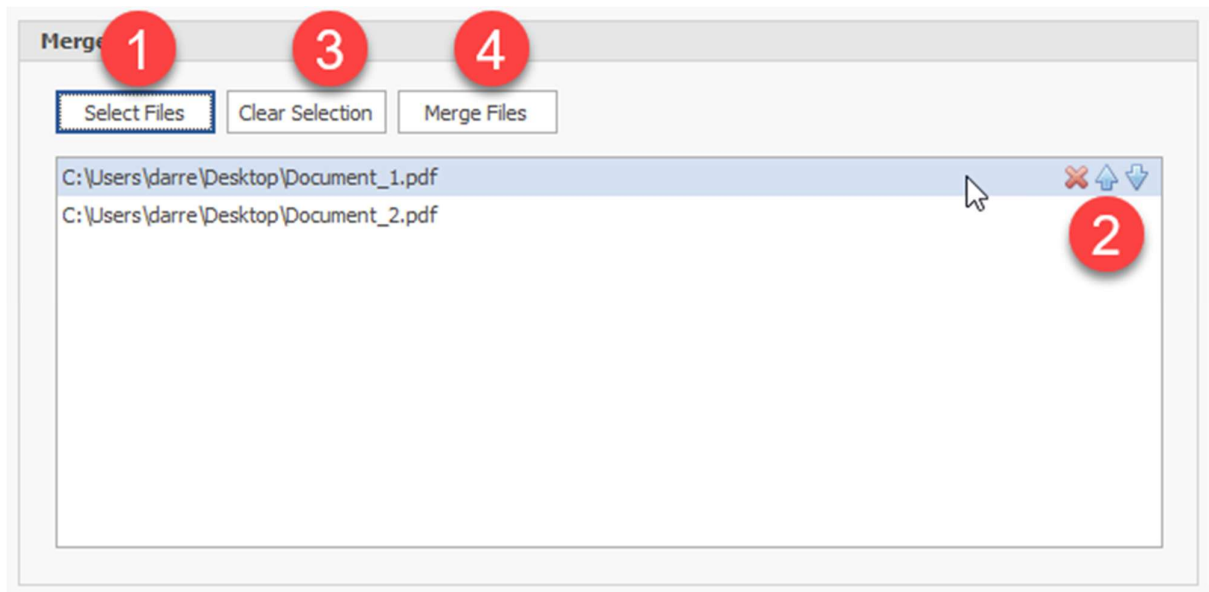
d. Browse and select the PDF you wish to insert

e. Choose where you want to insert the PDF e.g. First page in existing PDF, Last page in existing PDF, or Before / After a specific page in existing PDF





MERGE



- 1 Click **Select Files** to add the PDF documents you wish to merge – you can hold down CTRL key to select multiple files at once
- 2 You can use the icons next to each file name to remove or move the item up /down – the order in which they appear here is the order they will appear in merged PDF
- 3 You can click **Clear Selection** to remove all files from the list
- 4 When ready click **Merge Files** and you will be prompted for the name and location of your merged files



SPLIT

The screenshot shows a 'Split' dialog box with a light gray background. At the top, the title 'Split' is in a darker gray bar. Below the title, there is a 'Select PDF' button labeled with a green circle containing the number 1. Underneath this button, the text 'Selected File: split_test.pdf' is displayed. Below that, there is a label 'Split every x pages:' followed by a numeric input field containing the value '2', which is labeled with a green circle containing the number 2. At the bottom of the dialog, there is a 'Split PDF' button labeled with a green circle containing the number 3.

- 1 Click **Select PDF** to choose the PDF file you wish to split
- 2 Choose how you wish the document to be split e.g. every x pages
- 3 Click **Split PDF** to perform the split operation. Split files will be saved in the location of the original document and named to indicate which pages they contain e.g. filename_1-2.pdf, filename_3-4.pdf etc



MARK

The screenshot shows a dialog box titled "Mark". At the top, there is a "Select PDF" button (callout 1) and a text field showing "File Selected: Document_1.pdf". Below this are four radio button options: "DRAFT" (selected), "SAMPLE" (callout 2), "CONFIDENTIAL", and "CUSTOM". Under these is a "Colour:" label followed by a color selection box showing a red swatch and a dropdown arrow (callout 3). At the bottom is a "Mark PDF" button (callout 4).

1

Click **Select PDF** to choose the PDF file you wish to watermark

2

Choose which watermark you wish to add

3

Choose colour for watermark

4

Click Mark PDF to mark the chosen PDF with your selected options, the marked file will be saved in the location of the original file with the chosen watermark appended to the filename e.g. Document1_DRAFT.pdf



CONVERT

Convert files to PDF 1

Word to PDFRTF to PDFExcel to PDFPowerPoint to PDFTIFF to PDFXPS to PDFImage to PDF

Convert files from PDF 2

PDF to Excel (.XLSX)PDF to Word (.DOCX)PDF to HTMLPDF Page(s) to Image(s)PDF to TIFF

Convert scanned document or image to text (OCR) 3

OCR from PDF to PDFOCR from PDF to TextOCR from Image to Text

Extract all text from PDF 4

Extract Text

Advanced conversions 5

> Accurately convert PDF to Excel with automatic recognition of tabular content
> Convert PDF to Word ensuring the document retains the flow and layout of your original file
> Automatically convert scanned and/or rotated documents into editable content
> Convert PDF to PowerPoint retaining the original design and layout

PDF to Excel (.XLSX)PDF to Word (.DOCX)PDF to PowerPoint (.PPTX)

☒ Only convert tabular content
☒ Combine all output into single sheet

1

Here you can convert a variety of different file types to PDF including:

Word (.DOC, .DOCX)

Excel (.XLS, .XLSX)

Rich Text Format (.RTF)

PowerPoint (.PPTX)

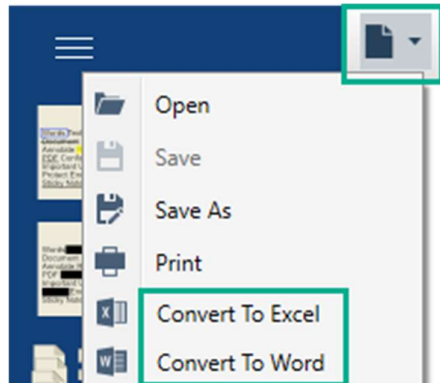
Multipage TIFF files (*.TIF, *.TFF) or Image file (.BMP, .JPEG, .JPG, .GIF, .PNG etc)

2

Here you can convert a PDF file to Excel (.XLSX), Word (.DOCX), or HTML

You can also convert each page of a PDF to a separate image (.PNG) file or to a multipage TIFF file

TIP: You can also convert the currently open PDF to Excel or Word from the File menu or using the icons on the toolbar as shown below





CONVERT

3

This allows you to convert a PDF containing scanned images into a PDF or Text document containing editable text, or to convert an Image file into a Text document

4

This allows you to extract all text from a PDF document

5

Advanced conversions – only available with optional annual premium subscription

- Accurately convert PDF to Excel with automatic recognition of tabular content
- Convert PDF to Word ensuring the document retains the flow and layout of your original file
- Automatically convert scanned and/or rotated documents into editable content
- Convert PDF to PowerPoint retaining the original design and layout



PROTECT

The screenshot shows a 'Protect' dialog box with the following elements:

- 1** A 'Select PDF' button at the top left.
- 2** A 'Password Type' section with three radio buttons: 'User - password is required to open / view the PDF' (selected), 'Owner - password to restrict permissions in the PDF', and 'Both'.
- 3** A 'Permissions' section with three checkboxes: 'Allow Printing', 'Allow Modification', and 'Allow Data Extraction'.
- 4** A 'Protect PDF' button at the bottom left.

Other text in the dialog includes 'Selected File: Document.pdf' and the title 'Protect'.

1

Click **Select PDF** to choose the PDF file you wish to protect

2

Choose the Password Type you wish to apply:

User password is required to open / view the PDF

Owner password restricts permissions in the PDF such as allowing printing or allowing content to be extracted from the PDF

3

If you chose Owner or Both in Step 2 then here you can choose the protection options you require, by default all protected document do not allow printing, modification or extraction of content

If you chose User then these settings are not relevant and will be greyed out

4

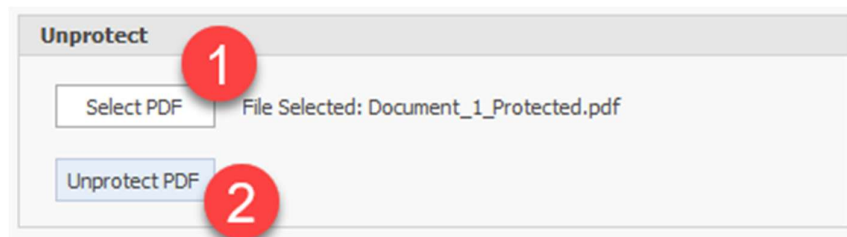
Click **Protect PDF** and you will be prompted for a secure password to use to protect the chosen PDF

N.B. If you chose Both in Step 2 then you will be prompted for two different passwords, one to open / view the PDF and one to protect the PDF permissions

The protected file will be saved in same location as original file with _Protected appended to the filename



UNPROTECT



1

Click **Select PDF** to choose the PDF file you wish to unprotect

2

Click **Unprotect PDF** and you will be prompted for the existing password so it can be removed from the chosen PDF file

The unprotected file will be saved in same location as original file with _Unprotected appended to the filename



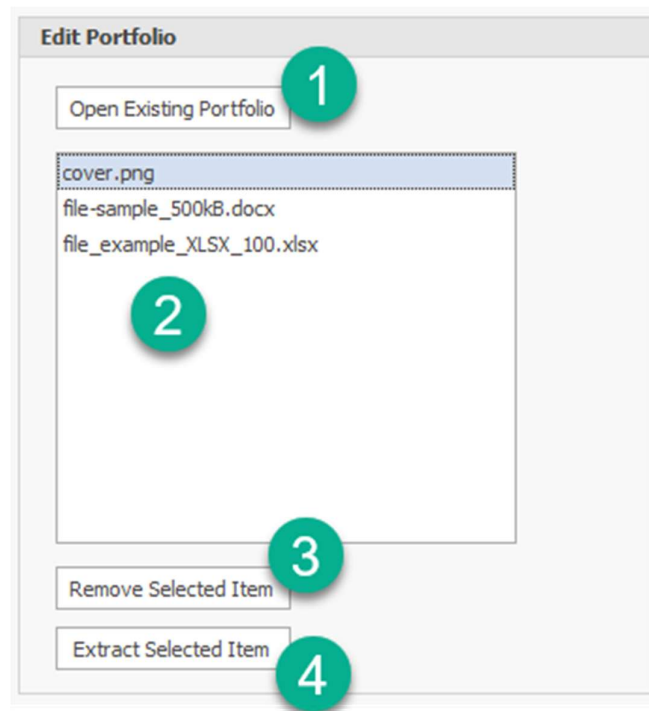
PORTFOLIO - CREATE

The screenshot shows a 'Create Portfolio' window. At the top, there are three buttons: 'Add Files' (labeled 1), 'Clear Selection' (labeled 3), and 'Create Portfolio' (labeled 4). Below the buttons is a list of files. The first file, 'C:\Users\darre\Desktop\cover.png', is highlighted (labeled 2). To the right of each file name are icons for removal (a red X) and movement (up and down arrows). Below the list, a note states: 'N.B. The top document will automatically be set as the startup document / cover page'.

- 1 Click **Add Files** to choose which files you wish to add to your portfolio, you can add lots of different file types such as Word, Excel, Text, Images etc – you can hold down CTRL key to select multiple files at once
- 2 You can use the icons next to each file name to remove or move the item up /down – the item at the top of the list will be the one set as the startup document and cover page in your portfolio
- 3 You can click **Clear Selection** to remove all files from the list
- 4 When ready click **Create Portfolio**, you will be prompted for name and location and the portfolio will be created for you



PORTFOLIO – EDIT



1

Click **Open Existing Portfolio** to browse and open an existing portfolio file

2

This list will show all files which are contained in the selected portfolio

3

You can highlight an item in the list and click **Remove Selected Item** to remove it from the portfolio

4

You can also extract items from the portfolio by highlighting the item you wish to extract in list above and then clicking **Extract Selected Item**, you will then be asked for location to save the extracted file



TOOLS – DOCUMENT INFORMATION

1

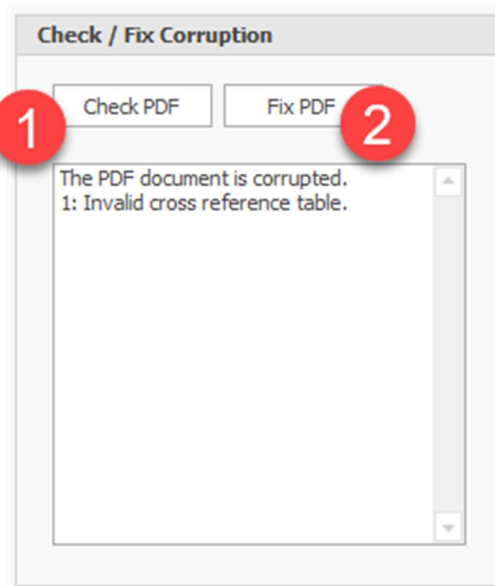
Click **Select PDF** and choose the PDF you would like to see information for

2

Once selected this panel will show you detailed information about the chosen PDF including Author, Creation Dates, Security, and Font information



TOOLS – CHECK / FIX CORRUPTION



1

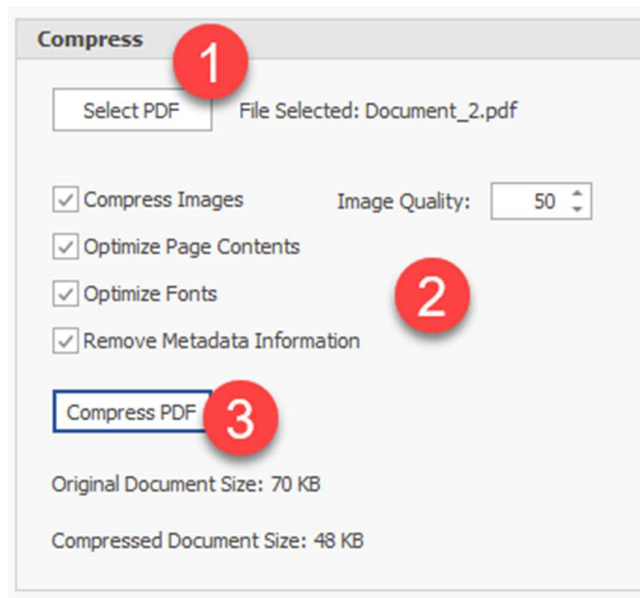
You can check a PDF file for corruption by clicking the **Check PDF** button, it will then show you if PDF contains any syntax errors or corruption

2

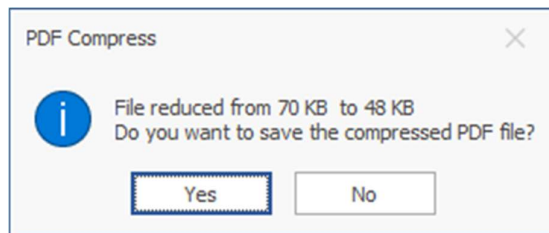
You can attempt to fix any corruption by clicking the **Fix PDF** button and choosing the file you wish to try and repair, not all corruption can be repaired however



TOOLS – COMPRESS



- 1 Click **Select PDF** and choose the PDF you would like to compress
- 2 Select your compression options
- 3 Click **Compress PDF**, a dialog box will show the original and compressed file sizes (if smaller) and ask you if you wish to save the compressed PDF file





SETTINGS

The screenshot shows the 'SETTINGS' window for PDF Assist, organized into two columns. The left column contains sections for 'General', 'Convert', 'Zoom Mode', 'Signature Text', and 'Choose Default PDF Viewer'. The right column contains sections for 'Redact', 'Annotate', and 'Updates'. Numbered callouts (1-9) highlight specific features: 1. General settings (Annotate/Redact radio buttons, drag-to-open checkbox, save prompt checkbox); 2. Convert settings (overwrite source file checkbox); 3. Zoom Mode (Default zoom mode dropdown set to 'Actual Size'); 4. Signature Text (text input field containing 'Darren Rose'); 5. Choose Default PDF Viewer (Choose button); 6. Redact settings (checkboxes for automatic marking, NI Number, UTR, Phone Numbers, and Dates); 7. Annotate settings (Default font size and colour dropdowns, checkboxes for clipboard pasting and comments panel); 8. Updates (version number v2.3.1, Check For Update button, and automatic download checkbox); 9. Save Changes button at the bottom left. A red note at the bottom states: 'N.B. Some settings you change such as Redact, Zoom Mode and Signature Text will not come into effect until the next time you start PDF Assist'.

- 1 General settings allow you to choose which page opens automatically when launching PDF Assist – either Annotate or Redact, you can also enable the feature so any PDF files dragged onto the app will automatically be opened, and also enable/disable the prompt to save changes upon exit
- 2 By default when performing OCR it will save file with _OCR appended to filename, if you wish instead to overwrite the source file then it can be enabled here
- 3 Here you can choose your default Zoom Mode – Actual Size will show the show the PDF at 100% zoom, Fit Page will fit the entire page in the viewer, whilst Fit Width will fit the entire width of the page in the viewer
- 4 This is the text which will be used when you click sign document by adding a text signature button in the annotate window
- 5 Click **Choose** to set your default viewer for PDF files, in window that appears click Change and then select the app you wish to be your default



SETTINGS

6

Here you can enable automatic marking of common redaction areas, and choose which items you wish to mark automatically

7

Here you can choose your default annotate settings for Font Size and Font Colour, as well as being able to disable the automatic creation of text boxes / stamps from clipboard content when pressing Ctrl+V, and choosing whether to automatically show the comments panel for PDF files which contain annotations / comments

8

Click here to manually check for updates, if application has already checked automatically within last 7 days, then it will not check again

You can also turn off automatic updates

N.B. If you have purchased PDF Assist via Microsoft Store then this section will not be visible and any updates will be available via the Microsoft Store app instead

9

Click **Save Changes** to save any settings changes you make



ABOUT

| v2.1.0 | |
|-----------------------|-----------|
| Licensing Information | |
| Licensed To: | PC Assist |
| License Type: | Full |
| Expiration Date: | n/a |
| Number of Licenses: | Unlimited |

The about page shows you the currently installed version along with details about who the product is licensed to, the type of license, expiry date for license if trial version (or annual license) and the number of computers you are entitled to install PDF Assist on



IT ADMINISTRATORS

Disable updates per computer rather than per user – handy if installing PDF Assist in a virtualized infrastructure such as Citrix, Hive or Remote Desktop

HKEY_LOCAL_MACHINE\SOFTWARE\PC Assist Software\PDF Assist
add DWORD (32-bit) called AutomaticUpdates and set to 0