

# **deskPDF® 2.5 Professional User Guide**



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# Preface

## Overview

deskPDF is a PDF authoring tool which converts virtually any non-standard document type into the universally recognized PDF document format standard. deskPDF utilizes the Portable Document Format (PDF) standard to allow secure, convenient and cost effective document publishing within *and* across hardware, software, and geographic boundaries.

## Purpose

This guide is intended to show how to use the features found within deskPDF Professional. For information on product installation, product registration, deskPDF Standard features, or enterprise deployment; please refer to the appropriate document located at [www.docudesk.com/download.asp](http://www.docudesk.com/download.asp)

## Conventions

This guide uses textual and graphical conventions to simplify comprehension of its contents.

### Text Conventions

The table below highlights the text conventions used in this guide

<b>Convention</b>	<b>Explanation</b>	<b>Example</b>
Alternate mouse click	Usage of the right mouse button	Select the "print to PDF Function using the <i>alternate mouse click</i>
Arrow →	Indicates the selection order of menu items	File → Save This indicates go to the File menu and select the Save function
<b>Bold</b>	Indicates user input	Press the <b>Enter</b> key
Click	Usage of the default mouse button	<i>Click</i> the deskPDF properties window to show additional configuration options.

## ***Icons***

The following icons are used in this guide:



**Note:** A note is an informational message containing a suggestion or a tip



**Alert:** An alert icon is a message to follow instructions closely

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# Introduction

## ***Overview***

Thank you for purchasing Docudesk's deskPDF Professional Edition, a leading product in electronic document publishing automation. This guide is designed to help readers gain a solid understanding of the unique features of deskPDF to address the most challenging document publishing requirements.

This guide is intended to address those features found in version 2.5 of deskPDF Professional Edition.

## ***Audience***

Docudesk's deskPDF is an easy to use yet powerful application which has many features available for both advanced publishing experts as well as beginners whom are new to document conversion and publishing. This guide is intended to help both users and systems administrators with deskPDF's extensive capabilities.

Users just getting started in PDF creation or users with years of experience will find this guide helpful. Users in both skill sets are encouraged to read through this document thoroughly to make the most of deskPDF's feature set.

# System Requirements

## Hardware

deskPDF can operate effectively on a very basic or dated system configuration; however, to ensure a satisfactory experience in the processing of large documents the system should have at least the following specifications:

- Processor: 100 Mhz x86 Processor
- RAM: 32 Megabytes
- Available Hard Drive Space: 30 Megabytes

Alternatively, as a rule of thumb, if the system performs the printing requirements of Microsoft Office documents satisfactorily, deskPDF will perform well.

## Software

deskPDF's requires the Microsoft Windows operating system to be installed on prior to installation of deskPDF. The following versions of Microsoft Windows are supported in deskPDF 2.5 Professional Edition:

- Microsoft Windows 98
- Microsoft Windows ME
- Microsoft Windows NT 4.0 Workstation/Server
- Microsoft Windows 2000 Professional/Server/Advanced Server
- Microsoft Windows XP Home/Professional
- Microsoft Windows Server 2003

# Getting Started

## Creating PDF's with deskPDF Professional

The deskPDF application can be configured in several different ways to address quality settings, security, and particular formatting needs. This section, *Getting Started*, provides a quick introduction into how to create a PDF in the most basic sense. Subsequent sections address advanced deskPDF Professional configurations and options.

## From the Print Menu

There are several methods to create PDF documents using deskPDF; however, initiating deskPDF from the document print function is the most popular. To initiate this process open the document which you wish to convert in the application of choice (i.e. Microsoft Word, AutoCad, etc.). Go to the **Print** menu. This is accomplished in Microsoft Word by entering **ctrl + P** on the keyboard or by going File → Print on the menu bar. **Select** the *deskPDF printer* option on the print menu then **Click** the OK button (*Figure 1*).

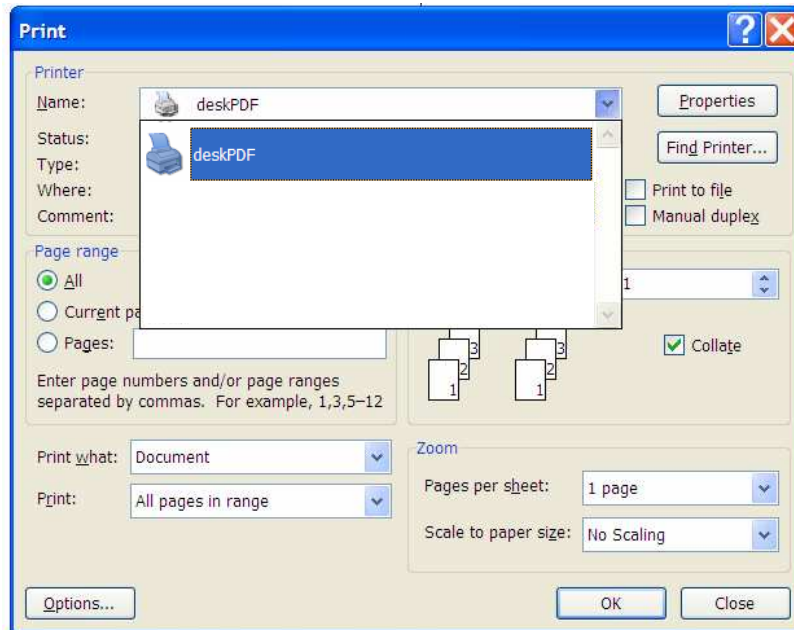
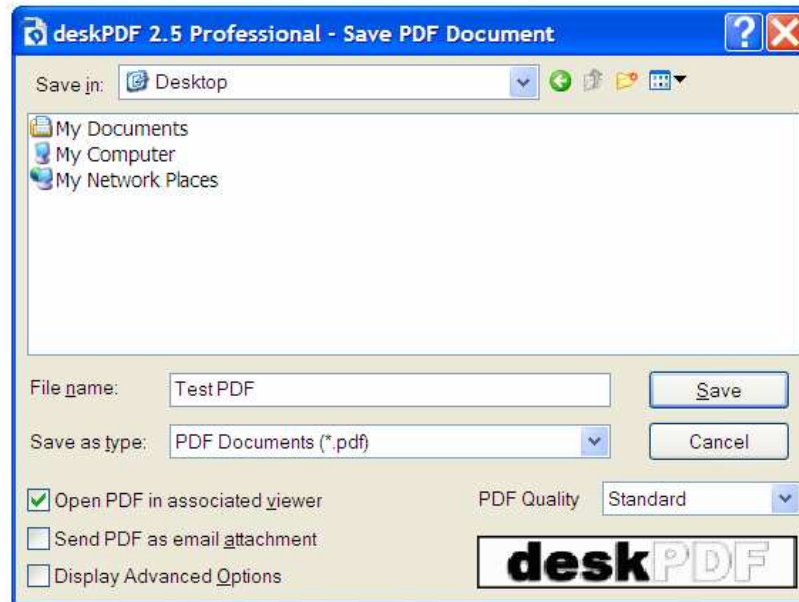


Figure 1



**Figure 2**

*Figure 2* prompts the user to select the file location to store the newly created PDF document. There are several options presented to the user on this screen. The same settings which were made in previous conversions will be made in subsequent conversions. These “sticky settings” will be overridden if the user changes manually them or if a pre-defined profile is selected. Refer to *deskPDF Configuration* for more information on profiles.

The following options are available:

- **Open PDF in associated viewer** – selecting this option will automatically present the new PDF in the default viewer. (i.e. Adobe Acrobat Reader). This option is disabled if no viewer is detected.
- **Send PDF as email attachment** – if an email client has been properly configured, this option will automatically create a new email with the PDF added as an attachment.
- **Display Advanced Options** – this option displays additional options which the user can apply to the final PDF document. (Details of this option will be displayed in the following section)
- **PDF Quality** – allows the user to create PDF’s of differing quality at the expense of file size. The following preconfigured options are provided.
  - **Web/Email:** Image quality is reduced to minimize overall file size to make the file better suited for slow connections
  - **Standard:** Fonts are embedded in the PDF and the images are better quality than that of the *web/email* option.

- **Print:** Image quality is improved over the *Standard* option file overall file size also increases.
- **Prepress:** Best overall quality, largest file size.



**Note:** The Standard option provides a good balance between image quality and file size. Selection of the other options should be considered if using low bandwidth connections or preparing a document for high quality publication.



**Note:** Custom PDF quality settings can be made by editing the joboptions files in C:\Program Files\DocuDesk\deskPDF\QOptions\. Simply duplicate an existing joboptions file and adjust the desired parameters. The next time deskPDF is launched the newly added quality setting will be presented.



**Alert:** At this point, after entering the filename and file location along with selecting a PDF Quality setting, a PDF can be created. After making the selections, Click **Save** to create your PDF document. If any options are selected, they will be executed when the document is saved.

## ***Desktop Drag & Drop***

One of the feature options which is provided with deskPDF 2.5 is a utility which allows for users to quickly drag & drop documents onto the deskPDF desktop icon to convert the document into a PDF.

To use this feature, simply **single Click and hold** the mouse button over the selected source document and while holding the mouse button **drag** the document on top of the deskPDF icon shown in *Figure 3* and **release** the mouse button.

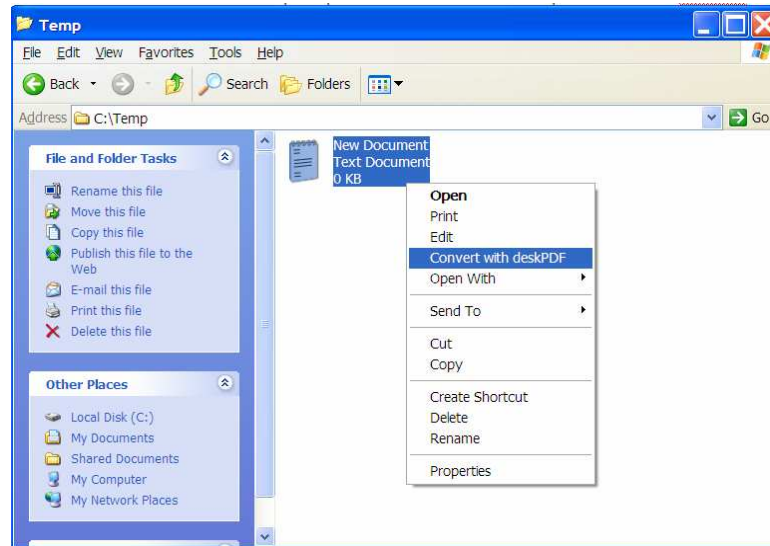


**Figure 3**

This action will initiate the PDF creation process. The user will be presented with the print window as shown in *Figure 2*. Follow the steps shown following *Figure 2* to complete the process.

## ***deskPDF Right-Click Conversion***

Another feature option presented at installation is the placement of the deskPDF file conversion option within the right click menu. To access this feature make an Alternate Mouse Click on the document to be converted either within windows Explorer (also known as File Manager) or on the Windows desktop. This sequence is illustrated in *Figure 4*.



**Figure 4**

Selecting the *Convert with deskPDF* menu option, will initiate the PDF creation process. Next the user will be presented with the print window as shown in *Figure 2*. Follow the steps shown following *Figure 2* to complete the process.

## ***Document Merging***

deskPDF 2.5 Professional supports document merging. This allows users to append (add the document to the end of an existing document) or prepend (add the document to the beginning of an existing document).

To use this functionality save the document as normal, but rather than selecting a new file name select a file name of an existing PDF. After this is done, as shown in *Figure 5*, a dialog box appears prompting the user to either *Replace*, *Append*, or *Prepend* the selected document. If none of these options are desired, select *Cancel* and enter a unique file name.

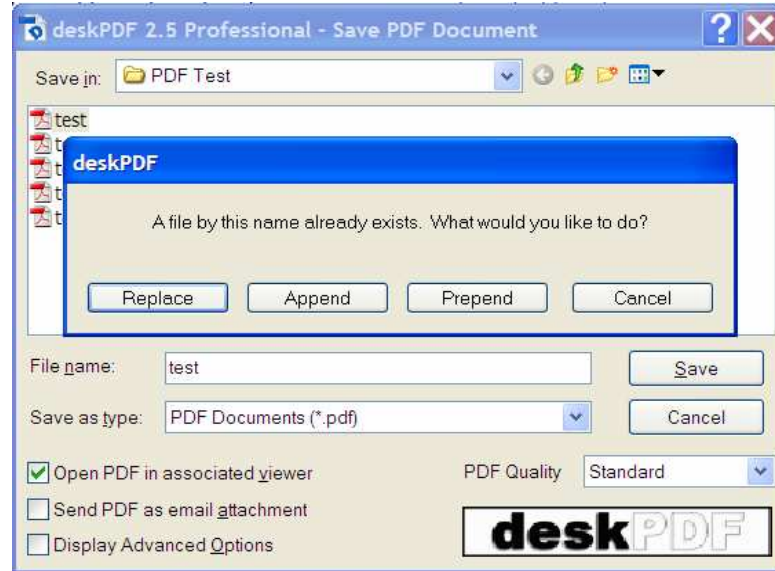


Figure 5



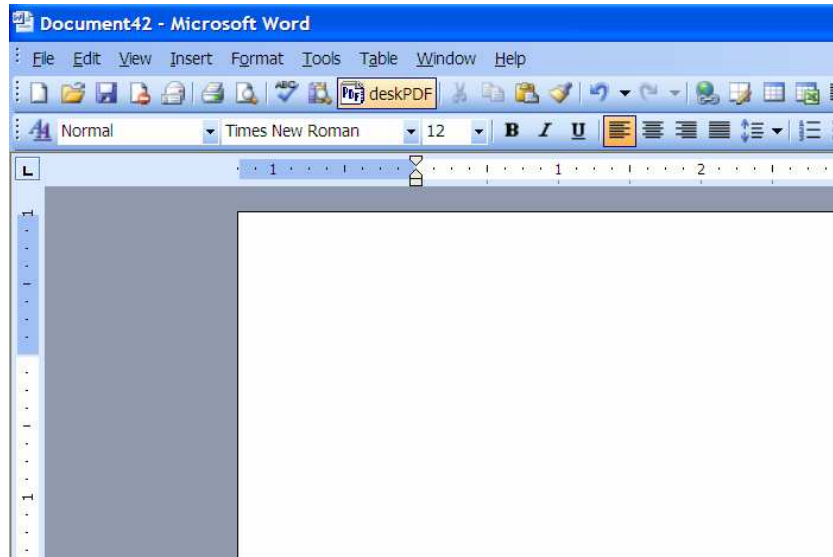
**Note:** If an encrypted destination file is selected for appending or prepending, the user will first be prompted to enter the password of the destination document to make changes to the document, including document appending and prepending.



**Note:** If an existing document is prepended or appended with a PDF with different document attributes, the original document's attributes will be overwritten with the appending or prepending document's attributes.

## ***deskPDF Tool Bar Function for Microsoft Word***

deskPDF Professional integrates with Microsoft Word to provide enhanced interoperability in converting hyperlinks, bookmarks, table of content entries and form text fields into their PDF equivalents. To utilize these capabilities, the deskPDF function on the Microsoft Work menu bar must be used (*Figure 6*).



**Figure 6**

The deskPDF tool bar button supports the conversion of hyperlinks in both text and images whether in the main document body, within a table, or in header or footer fields. Many different link styles are converted including; HTTP, FTP, file links, and bookmarks pointing to different locations within a document.



**Note:** deskPDF converts all web URL styles including:

<http://www.docudesk.com>  
<https://www.docudesk.com>  
[www.docudesk.com](http://www.docudesk.com)

## ***Conversion of Table of Contents***

deskPDF Professional converts Word table of content links and reflects the update in the PDF bookmarks of the PDF reader's left navigation tab (*Figure 7*).



**Note:** If subchapters are present in the Word document, they will be converted and displayed as nested bookmarks.

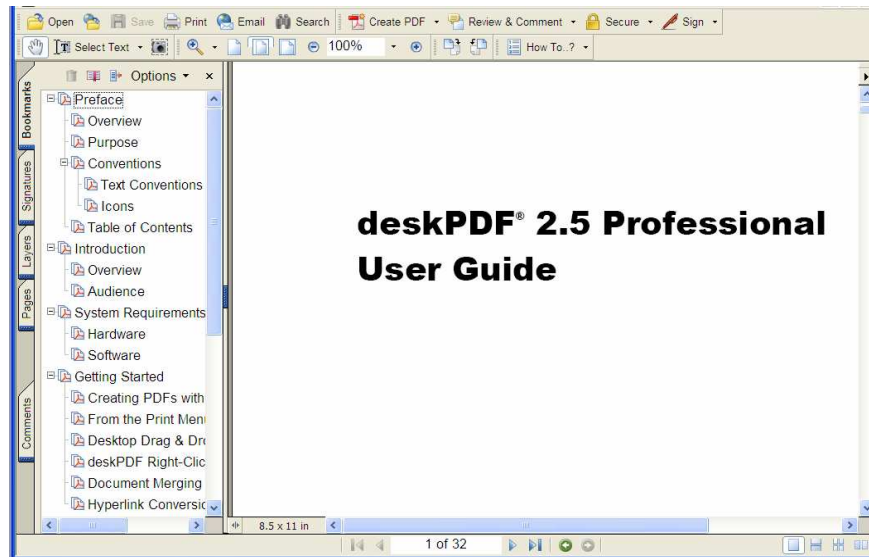


Figure 7

To use this capability, first save your newly created Word document. Once saved, click the deskPDF icon (*Figure 6*). This initiates the PDF creation process. Users can follow the steps illustrated following *Figure 2* to complete the process.



**Note:** Excessively long hyperlinks that consume more than one line are often incorrectly converted. Limit the length of the hyperlink's visible text to prevent issues.



**Note:** If the source Word document has comments, deskPDF will prompt the user asking if it should convert the comments to PDF annotations.

# deskPDF Configuration

## Overview

In most instances the default configuration will support the majority of users' needs. However, there are advanced options which can be utilized to modify deskPDF to support unique requirements.

Many of the enhancements of deskPDF Professional version 2.5 are found in the advanced configuration and advanced options settings.

## Advanced Properties

The *Advanced Properties* window is accessed by going to the **Print** menu. This is accomplished in Microsoft Word by entering **ctrl + P** on the keyboard or by going **File → Print** on the menu bar. **Select** the *Properties* button. The following windows shown in *Figure 8* are then displayed. The *deskPDF Advanced Options* window in the foreground is available following selection of the *Advanced* tab.

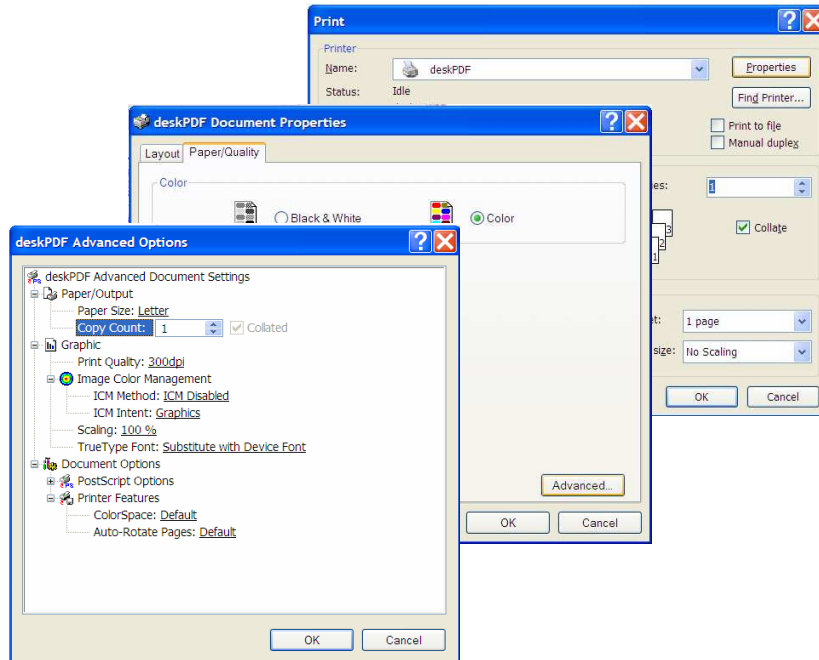


Figure 8

In the initial *deskPDF Document Properties* window, users can select whether the PDF output is provided in color or black & white.

Selection of the *Advanced* button presents users with the Advanced Options window.



**Alert:** Users should make note of their default settings in the Advanced Options in case unintended changes are made while adjusting these settings.

The following Advanced Options are available:

- **Paper/Output:** Users can adjust the print format such that the PDF documents can be properly printed on different sized paper.
- **Copy Count:** This capability is not relevant to deskPDF
- **Print Quality:** Adjusts the dpi of the PDF document. (has a direct impact on file size)
- **Image Color Management:** This capability is not relevant to deskPDF
- **Scaling:** This feature adjusts the PDF “image” size in relation to the Page size.
- **True Type Font:** Allows selection of device font or download as a soft font. Download as soft font is suggested.
- **PostScript Options:** The language level is the only relevant option. Select option 2 if using the Ghostscript Interpreter. Higher options can be used if using Adobe Distiller to adjust settings.

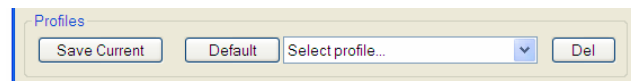
## Advanced Options

### Profiles

By selecting the *Display Advanced Options* check box the *Profiles* and *General* tab (*Figure 10*) will be displayed.

The *Profiles* functionality is a new 2.5 capability which provides the ability to save custom configurations so they do not have to be re-entered each time when required for a frequently used document type or purpose.

The profiles functionality is shown below in *Figure 9* and is also highlighted in yellow outline in *Figure 10*.



**Figure 9**

To use the profiles functionality follow these steps:

- Make the desired setting changes for the specific requirement. (For example, select preferred quality setting, whether you want to automatically send an email, security preferences, etc.)
- **Click** the *Save Current* button. You will be prompted for a file name to save the profile. (i.e. weekly newsletter, sales projections, finance ledger, etc.)
- Once saved the newly created profile will be viewable in the profile window. To utilize the profile, highlight the setting and save the document as normal.

If the profile is intended for use for most document conversions, **select** the desired profile and **click** the *default* button. A dialog prompt will confirm your actions.

To delete a profile, simply select the profile and **click** the *del* button. A dialog prompt will confirm whether or not the profile should be deleted.

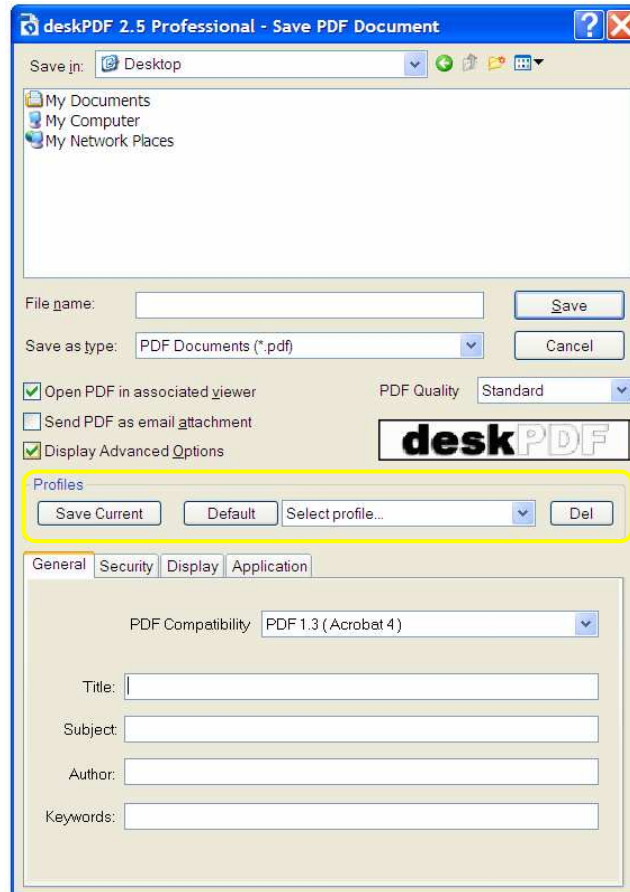
### General Tab

The following options are available for the *General tab*:

- **PDF Compatibility** – Setting this option adjusts the output from deskPDF to support a given compatibility level. Since readers are always backwards compatible, the newest reader can view previous versions of the PDF standard, whereas older PDF viewers might not be able to properly read

the newer PDF specification. Acrobat 4 compatibility is recommended for general distribution as it provides rich functionality and can be viewed by the widest possible audience.

- **Document Meta Data** – This option allows the details to be associated with the PDF document. The document title is provided via the Windows print job name. Users can modify any of these settings as desired.



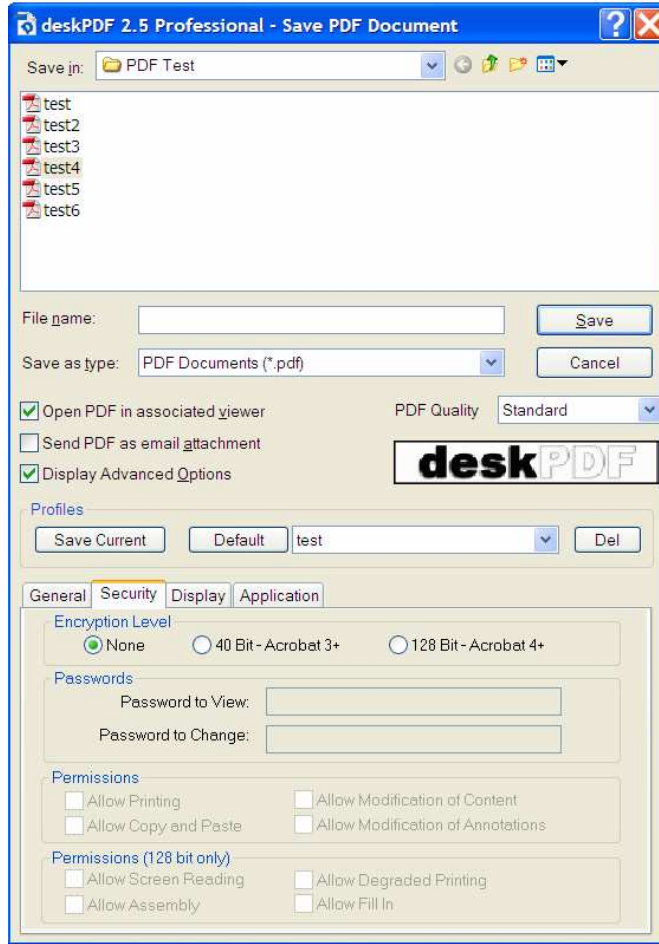
**Figure 10**  
Advanced Options - General Tab



**Note:** If the user chooses to leave the *Title:* field is blank when saving a new Profile, the *Title:* field will be dynamically inserted based off the current document's print job name. If the user chooses to enter a title name as part of a profile (i.e. Weekly Sales Projections), the *Title* field will keep this title in future conversions. This provides flexibility in meeting various business document naming conventions.

## Security Tab

Clicking on the *Security* tab introduces some of the powerful new permission capabilities available in deskPDF Professional. To utilize these capabilities the user must first **select** an encryption level which corresponds to the compliance of the Acrobat reader which the receiving party will be using to access the newly created document.



**Figure 11**  
Advanced Options – Security Tab



**Note:** deskPDF 2.5 automatically disables the permissions that are not able to be set with the currently selected encryption level.

**Selecting** the “40 Bit Acrobat 3+” encryption level will only allow the user to use the following base permissions:

- **Allow Printing** – Enables users to print the document without any restriction
- **Allow Copy and Paste** – Permits users to copy text or images and paste them into other documents.
- **Allow Modification of Content** – Permits users to edit text or images and save them to the document.
- **Allow Modification of Annotations** – Allows users to change any comments or annotations made within the document

**Selecting** the “128 Bit Acrobat 4+” encryption level introduces the permissions available in the “40 Bit Acrobat 3+” encryption level *and* the following permissions:

- **Allow Screen Reading** – Allows accessibility programs, such as those designed for the visually impaired, to convert the PDF text into HTML or ASCII so they can be presented in a more legible manner. By selecting this option disabled users will still be able to view the PDF, but others will not copy the document.
- **Allow Assembly** - Document assembly refers to replacing, rotating, inserting, and deleting pages. Check this option if this functionality is to be permitted
- **Allow Degraded Printing** – Selecting this option restricts printing quality to 150dpi and is used to prevent publication.
- **Allow Fill-In** – Permits users to enter data into form fields



**Alert:** Do not select 128-bit encryption unless the PDF file will be viewed exclusively by Acrobat 5.x users or greater. Acrobat 4.x and earlier can't open PDF files saved with 128-bit encryption and instead returns the error *"There was a decryption error when opening this document."*

The password fields restrict users without the required permission from viewing or modifying the document. The following password options are available:

- **Password to View** – This password secures the file so readers must enter the password before they can open the file.
- **Password to Change** - A change security password secures the file so only the author, or anyone who has this password, can set or change security settings.



**Alert:** You must remember your passwords in order to access the PDF after you have added security. Write them down, and store them in a safe place!



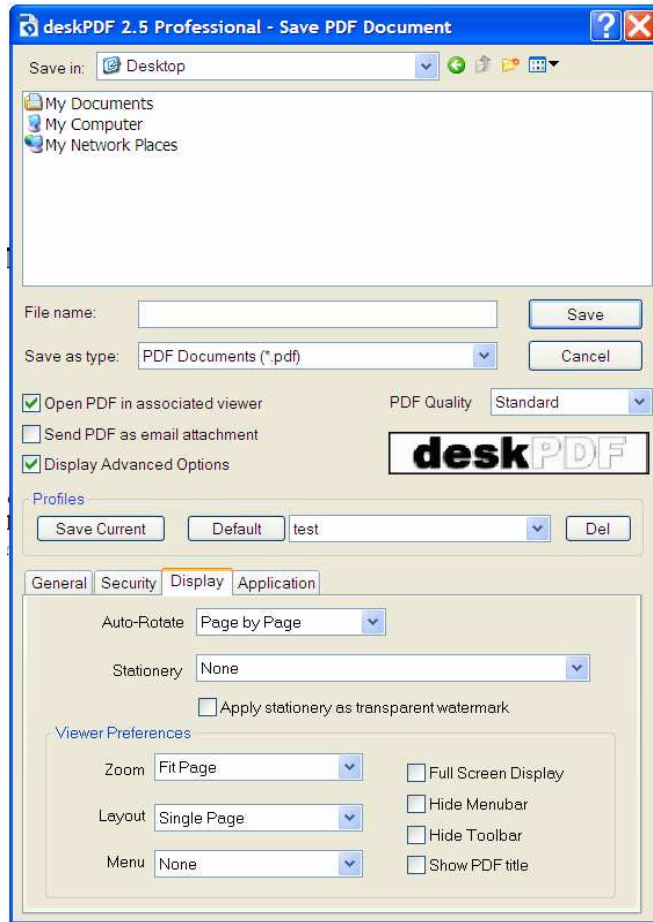
**Note:** If an encryption level is set but no password is entered, deskPDF will assign a randomly generated password to protect your document. A warning message is displayed explaining this behavior unless disabled by the user or administrator.

## Display Tab

deskPDF Professional 2.5 allows the ability to modify the default display of your PDF when opened in a reader, as well as impose graphics and text on the PDF by using the stationery function.

*Auto-Rotate Pages* automatically rotates pages based on the text orientation. For example, some pages designed to print landscape may require rotation to be viewed at the proper angle. Choose "None" to disable the *Auto-Rotate Pages* option. Choose "All" to rotate all pages in the document based on the orientation of the majority of text. Choose "PageByPage" to rotate each page based on the direction of the text on that page.

The *Stationery* function allows users to apply graphic or textual overlays to apply watermarks or electronic letterhead. deskPDF Professional comes standard with seven sample files for applying to documents.



**Figure 12**  
Advanced Options - Display Tab

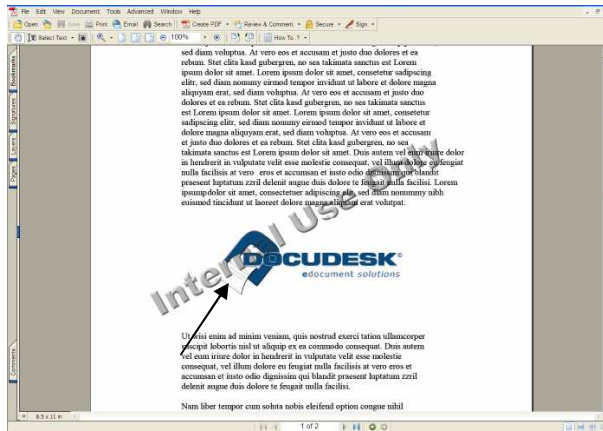


**Note:** Custom stationery can be created by saving a PDF formatted document in the C:\Program Files\Docudesk\deskPDF\Stationery

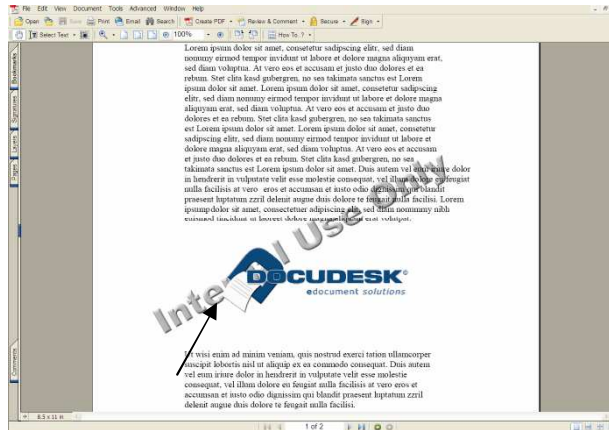
directory. Once saved in the directory, the next time deskPDF is initiated the stationery will be available in the stationery field.



**Note:** The *apply stationery as a transparent watermark* checkbox is useful when graphics are used within documents. When checked the stationery will be transparently imposed over the graphics. If this is not used, the stationery would be presented under the graphic and out of view. Some printers may take longer to print documents using the *transparent watermark* feature.



**Figure 13**  
Stationery applied as a transparent watermark



**Figure 14**  
Stationery applied without using the transparent watermark option

*Figures 13 and 14* illustrate the use of a stationery watermarks with and without the use of the transparent watermark option.

## ***Display Tab - Viewer Preferences***

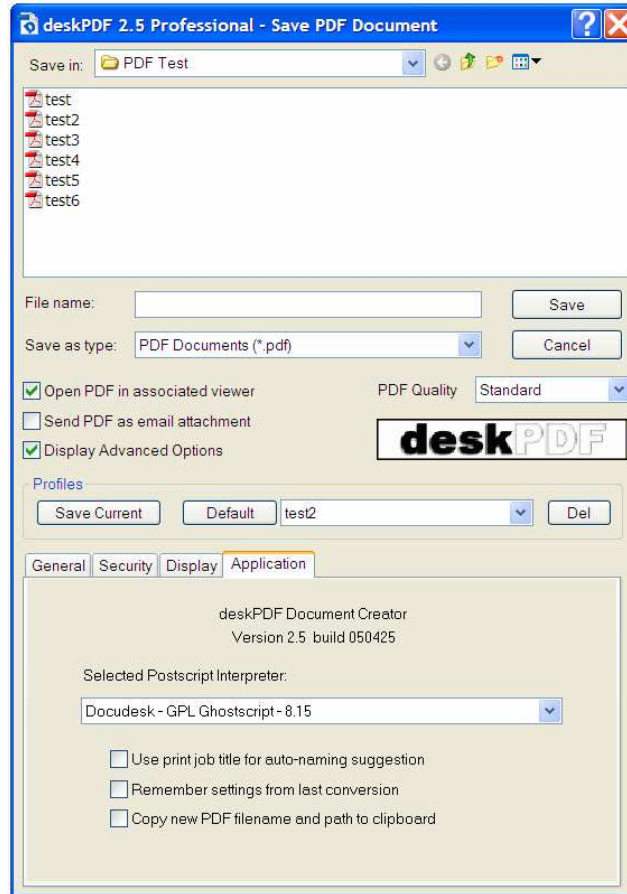
Within the *Display Tab*, there are viewer settings which allow for defining how the PDF will be presented to the person viewing the document.

The following viewer options can be set:

- **Zoom:** Preset options to set the zoom. Available options are: Fit to page, Fit to Width, 100%, 10%, 25%, 50%, 75%, 125%, 150%, 200%, 400%, 800%
- **Layout:** Configures how the viewer will display the pages: Options are: Single page, One Column, Facing, Two Columns L, Two and Columns R.
- **Menu:** Provides flexibility in displaying the left menu bar. Options are: None, Thumbnails, Bookmarks, and Hide Entire UI.
- **Full Screen Display:** Checkbox option which presents document to reader in a full screen sans any menus.
- **Hide Menubar:** Checkbox option which hides the menu bar from the reader.
- **Hide Toolbar:** Checkbox option which hides the toolbar from the reader
- **Show PDF Title:** When selected this option presents the PDF title as entered in the *General Tab*. Refer to *Figure 10*.

## ***Application Tab***

This tab contains persistent settings for the deskPDF application including selection of the Postscript interpreter. deskPDF will automatically detect the compatible interpreters installed on the system and display them as options in the drop down selection. Users can select the “None” option. Selecting this option sets deskPDF to write pure PostScript files (i.e. files with the .ps extension) that can be used for prepress work or for distilling at a later time. This is the default configuration if no postscript interpreter is detected.



**Figure 15**  
Advanced Options - Application Tab



**Note:** If Adobe Acrobat Distiller is not available, the GPL Postscript interpreter is freely available for download from the DocuDesk web site. This interpreter gives an excellent blend of performance and quality.

deskPDF Professional 2.5 provides the following application level settings:

- **Use print job title for auto-naming suggestion** – When checked deskPDF will populate the *File Name* field with a name based on initial content found in the source document.
- **Remember settings from last conversion** – Selection of this checkbox will retain the settings chosen for subsequent document conversions. It is important to remember that profile selection and changes made by administrators can override this selection. (In the instance that the deskPDF installation is part of a network domain)
- **Copy new filename file name and path to clipboard** – When checked deskPDF automatically copies the file location and name to the clipboard. This function facilitates accurate pasting within other applications. This capability is useful if the file is saved on a network with a long path name or if IT administrators use the

time/date naming extension function (i.e. for document security or archival purposes).

## Miscellaneous Notes

### ***Supported Languages***

deskPDF can convert all languages including multi-byte languages such as Kanji. Additional fonts for creating non-English language PDF files are freely available for download from the deskPDF web site. At this time, the deskPDF user interface currently only supports English.

### ***deskPDF Administration***

Enterprise implementations of deskPDF have several options for centralized deployment and implementation. For additional information please refer to the *Enterprise Deployment and Configuration Guide* located at [www.docudesk.com/download.asp](http://www.docudesk.com/download.asp)

### ***Additional PDF Information***

The following site provides additional information about the Portable Document Format standard.

<http://partners.adobe.com/asn/tech/pdf/specifications.jsp>

# Upgrading

## *Upgrading from a Previous Version*

Existing versions of deskPDF can be upgraded simply by installing the new version into the same directory as the existing version. The installer program should detect any prior versions. It is recommended to allow the installer to uninstall prior versions. Registered users will maintain their registration they acquired from the previous version unless the supported upgrade period has expired. For more information visit: <http://www.docudesk.com/support>

## **Known Issues**

### ***Bugs/Compatibility/etc.***

There are currently no known issues to report with deskPDF 2.5.



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