White Paper 2013

PhantomPDF:

The Right Solution to Create, Collaborate, Edit, and Secure PDF Documents

Microsoft® Partner
Gold Independent Software Vendor (ISV)

Foxit®

foxitsoftware.com

Table of Contents

Table of Contents 2
The Need for an Alternative PDF Solution 3
The Business Case for Foxit® PhantomPDF™ 3
Create, Collaborate, Edit, and Secure PDF Documents with Foxit PhantomPDF 4
PhantomPDF *Standard* 4
PhantomPDF *Business* 4
Creating PDF Documents 5
From Other File Formats 5
From Scanning Hardcopy Documents 6
Navigating easily using Ribbon-based toolbar 7
Organizing PDF Documents 7
Annotating PDF Documents to Collaborate With Others 8
Editing PDF Documents 9
General Editing 10
Advanced Editing 11
Securing PDF Documents 12
Signing PDF Documents 14
Sharing PDF Content with other Applications 14
PDF Forms 15
Form Filling 15
Form Design 16
Searching and Reading PDF Portfolios 17
Integrating with Evernote 17
Bundling with Desktop PDF index 18
Support When You Need It 18
Summary 19
Contact Us 20

The Need for an Alternative PDF Solution

We all need to create professional looking PDF documents and forms for tasks such as document sharing, implementing workgroup collaboration, designing company forms, producing company collateral, finalizing agreements, applying digital signatures, converting hardcopy documents to softcopy, and document archiving. A complete PDF solution for enterprises and governmental organizations consists of economical solutions for:

1) Enterprise PDF Reading
2) PDF document creation, collaboration, editing, and security
3) Search and index for easy PDF document search and retrieval
4) Digital Rights Management (DRM) and/or Information Rights Management (IRM) for protecting networked PDF documents
5) 24/7 worldwide telephone and email support

This white paper will focus on item (2) above – a solution to create, collaborate, edit, and secure PDF documents. To understand more details of the other components of a complete enterprise PDF solution, please refer to links below:

- Enterprise PDF Reader
- Get Better PDF Search Results
- PDF Security Suite

The Business Case for Foxit® PhantomPDF™

PDF has become the overwhelming file format of choice since it is a robust and open standard for document display and it works with just about any application, hardware device, and operating system. Whether you're posting a document on the Internet or storing important company documents in an archive, PDF has become a mission critical technology for most organizations.

As a result, the growth in the number of PDF documents has exploded. According to Google, PDF is the most popular file format on the Web after HTML（http://www.google.com/help/faq_filetypes.html). Therefore, the growth in the number of users who need to create, collaborate, edit and secure PDF documents has exploded as well. It's no

longer the need of just a few, many enterprise employees require PDF capabilities. Therefore, paying $299 to $449 for Adobe Acrobat® just isn't economically feasible.

Instead, get all the features you need (and more) at an affordable price. PhantomPDF is ISO 32000-1 / PDF 1.7 standard compliant and works with all your existing PDF documents and forms so migrating over is easy and it will cost far less than the list price to upgrade to the next version for Adobe Acrobat.

Create, Collaborate, Edit, and Secure PDF Documents with Foxit PhantomPDF

Award winning Foxit® PhantomPDF™ provides the right features at the right price, allowing you to produce great looking PDF document and forms quickly, affordably, and securely. Foxit PhantomPDF is the perfect solution for small and medium sized businesses and large enterprises. Customers choose Foxit products since they are fast, affordable, secure, and easy to deploy. With over 150 million users, award winning Foxit PDF solutions have been chosen by over 95,000 customers in over 190 countries.

Foxit PhantomPDF is available in two versions to fit the diverse use cases that different users require.

PhantomPDF *Standard*

PhantomPDF *Standard* provides PDF capabilities such as editing capabilities to change text; add headers, footers, page numbers, images and video; add and delete pages; design forms; and more. OCR support allows users to convert scanned or image-based content into selectable and searchable text. Users can export PDF to Microsoft Office®, text, RTF, HTML, and popular image formats. Comprehensive security features can safeguard documents through the use of password encryption, certificate encryption, and digital signatures.

PhantomPDF *Business*

PhantomPDF *Business* expands upon the capabilities of PhantomPDF *Standard* by providing advanced editing and enhanced security features. Users can extend the usage control benefits of Microsoft Active Directory® Rights Management Service to PDF documents to allow the author to control the document features within each PDF, like which users can view, print, copy, and edit the document. Redaction allows users to permanently remove (redact) visible text and images from PDF documents. Bates Numbering is supported for identification and protection purposes. Advanced

editing capabilities allow users to edit images, objects, and scanned documents; change page layout properties; add shading to objects; convert text to path; and edit .ai files, and more.

Creating PDF Documents

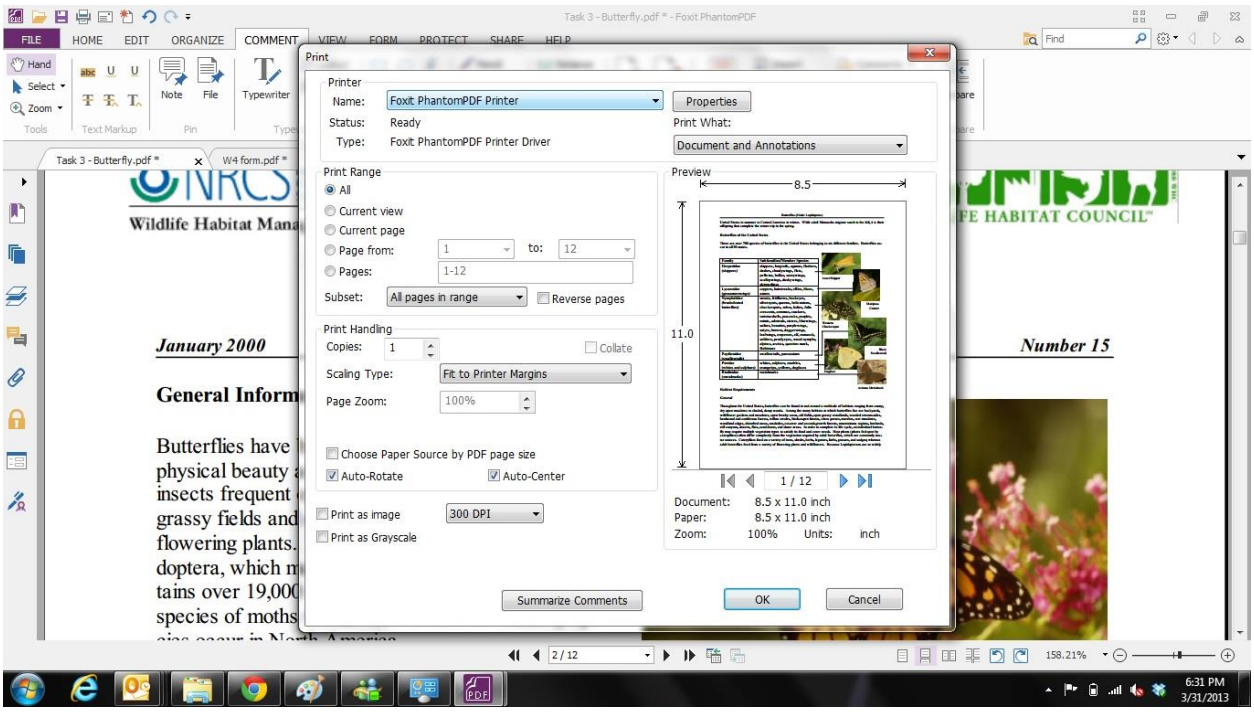
There are two common ways for users to create PDF documents:

1) Convert PDF from other file formats.
2) Convert hardcopy documents to PDF through the use of a scanner.

From Other File Formats

When users have the document softcopy source file, it is very easy to use PhantomPDF to convert the file into PDF. Common ways to accomplish this include:

1) In almost any word processing application, uses can convert the document into PDF by using the PhantomPDF printer driver. When using the application's printing function, instead of choosing an available printer, users can choose the Foxit PhantomPDF Printer. After hitting the print button after choosing the PhantomPDF print driver, the document will be converted into a PDF document.
2) Open the file in PhantomPDF and it will automatically convert the file into PDF.
3) Drag and drop the file onto PhantomPDF and it will automatically convert the file into PDF.
4) For Microsoft Office users, select the Foxit PDF tab in the menu bar and you can convert the file to PDF or covert the file to PDF and email it in one simple step; it maintains all inherit links in the Word document when it is converted to PDF, including Bookmarks.



From Scanning Hardcopy Documents

For many documents, the softcopy may not be available – the document is old and the softcopy has been long lost or only the hardcopy was available. Even without the softcopy, users can still produce PDF documents through the use of a scanner. With PhantomPDF, you can control the scanning process to develop new editable PDF documents from scanned images or append existing PDF documents with scanned images.

After you develop the PDF document from a scanner, the document's pages will be scanned images. This means users cannot select text to cut and paste or perform other functions. Users also cannot search for words in the image. However, PhantomPDF *Standard* and *Business* comes with Optical Character Recognition (OCR) software which will identify text in the scanned image and generate a layer behind the image which will allow users to select and search for text within the scanned document. After running the OCR tool on a scanned document, the user can also edit the text in the document. PhantomPDF *Business* also provides high compression of scanned documents - greater compression means smaller file sizes, which takes up less storage and will be easier to distribute electronically.

Navigating easily using Ribbon-based toolbar

Foxit PhantomPDF has an extremely user-friendly interface with a ribbon-based toolbar based on Microsoft® Office® 2013 (Office 15) design. This new user interface toolbar provides Foxit PhantomPDF users with a familiar user experience.

Organizing PDF Documents

After creating a PDF document, users can now manipulate pages of the document to organize it in the way that they want. PhantomPDF offers an array of organization features such as:

- Drag and Drop Pages across multiple Documents - PhantomPDF 6.0 allows users to utilize the page panel to drag and drop pages from one PDF document to other PDF documents quickly and easily. These pages can be moved from documents displayed in multiple tabs within one PhantomPDF instance or across documents displayed in multiple PhantomPDF instances.
- Compare PDF files – finds the differences between two PDF files so users can understand changes quickly and easily.
- Insert and delete pages.
- Extract pages – reusing selected pages of one PDF in a different PDF. Extracted pages contain not only the content but also all form fields, comments, and links associated with the original page content.
- Replace pages – replace a page with content from another PDF file.
- Swap and move pages – change the order of the pages in a PDF document.
- Duplicate pages – make a copy of a page.
- Split document – divide the content of a PDF document into multiple PDF documents
- Crop pages – to adjust the visible page area. This can help you create consistency within a PDF composed of pages of different sizes.
- Rotate pages – rotate pages to do things like change portrait to landscape or to correct pages put upside down in a scanner.

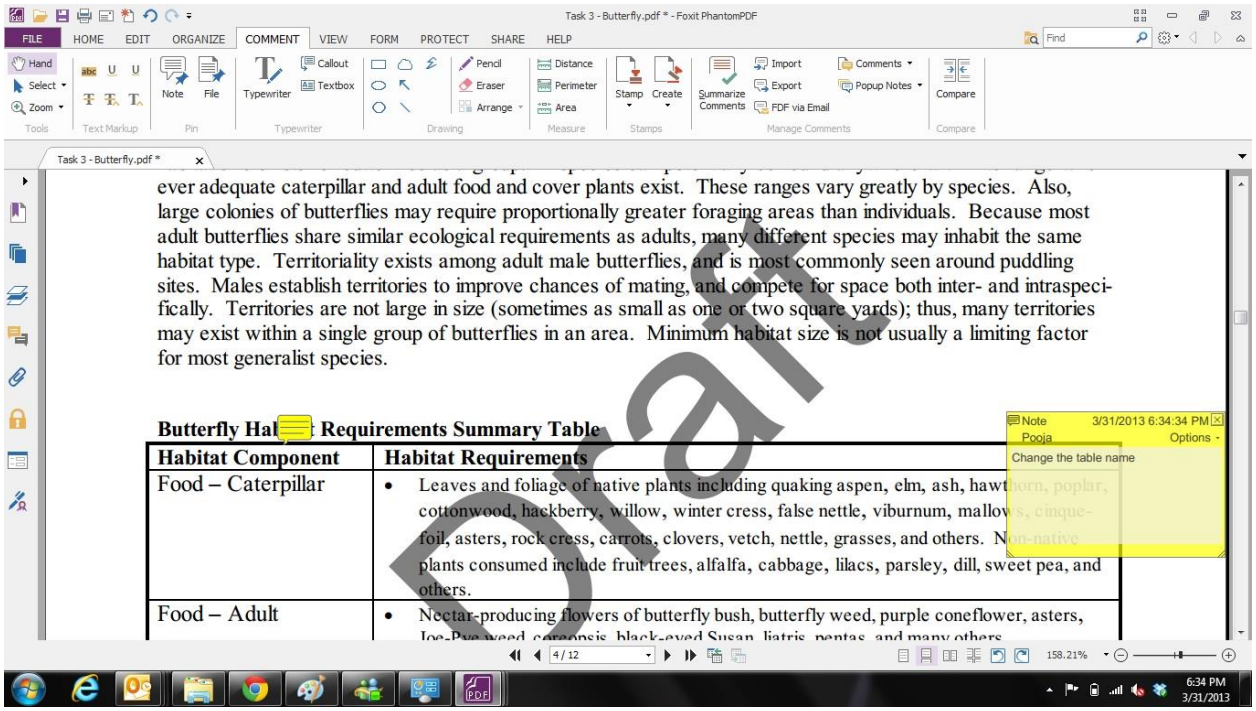
- Flatten pages – to reduce multiple layers of a document into a single layer. Multiple layers can result from many things like adding drawing and annotations. Flattening takes these annotations and makes them part of the original content.
- PhantomPDF provides integration with SharePoint, allowing users seamlessly checkout and check-in PDF files located on SharePoint servers.

Annotating PDF Documents to Collaborate With Others

Annotating (also called commenting) capabilities are very powerful in PhantomPDF. These features allow authors and reviewers to collaborate with each other to optimize the effectiveness of the documents they produce. PhantomPDF allows annotation on any type of content, including images. For example, users can create images of website content with the Windows Snipping tool, import them into PDF, and then easily provide feedback to the author of the content – try doing that with a word processor. There are various annotation tools with different functions for you to choose: Typewriter Tools, Markup Tools, Drawing Markup Tools, Measure Tools, Stamp Tools, and Notes Tools.

- **Comments Management** allows users to easily control the annotations provided and received. Users can export, import, summarize, hide all, and show all their annotations.
- **Notes** tools allows users to include "yellow post-it®" like comments on PDF documents.
- **Text Markup** tools indicate where text should be edited or noticed. Text Markups do not change the actual text in the PDF. Instead, they indicate which text should be deleted, inserted, highlighted or underlined. Text Markup tools include Highlight Tool, Underline Tool, Strikeout Tool, Squiggly Tool, Replace Tool, and Insert Tool.
- **Drawing** tools allows you to mark up a document with arrows, lines, squares, rectangles, circles, ellipses, polygons, polygon lines, clouds, etc. It is quite useful when you have to make some shapes to mark text or images.
- **Typewriter** tools allow users to add comments anywhere on a PDF, which doesn't appear as annotations. The tools include the typewriter, textbox, and callout tools. The typewriter tool is useful to fill in non-fillable forms. The callout tool boxes are especially useful when you want to single out (but not obscure) a particular area of a document. PhantomPDF also provides a spell checker for typewriter and notes annotations.

- **Stamp** tools enable users to stamp content and watermarks into a PDF document. Foxit PhantomPDF supports image stamps with various image formats (JPEG, GIF, BMP, WMF, etc.) 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 provide reader with the document's status or sensitivity.
- **Measure** tools enable users to measure distances and areas of objects in PDF documents. The measure tools 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.



Editing PDF Documents

PhantomPDF provides users the capability to edit documents. Editing differs from comments/annotations since comments/annotations allow users to add to an existing PDF file. Editing allows users to change to contents of the original PDF document. PhantomPDF support two types of PDF editing – general editing and advanced editing.

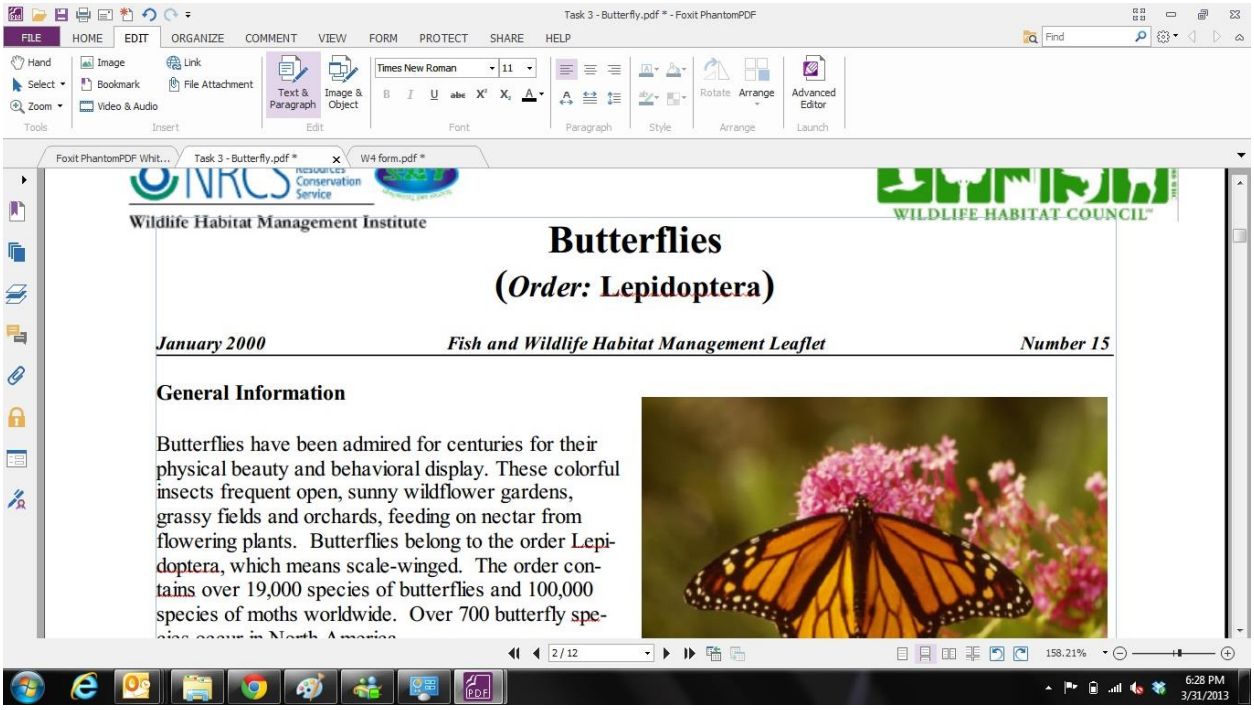
General Editing

PhantomPDF provides full-functioned PDF editing capabilities so users can edit PDF documents quickly, easily, and effectively. General editing features include:

- **Editing Paragraph** - Edit capabilities similar to that of word processing software. PhantomPDF automatically identifies text boxes and allows users to paragraph edit within that text box. Paragraph editing capabilities include:
  - Automatic reflow and reformat of text in the text box as you edit it.
  - Users can join text boxes together, change their size, and move them.
  - Edit the font of PDF text by changing type, style, size, color, and effect. Align text left, center, or right, while choosing from multiple line spacing options.
  - Choose to color change the edited text, making it easy for others to review and approve changes.
  - Spell check.
  - Align objects on the left, middle, or center. Distribute objects horizontally or vertically. Rotate, flip, or shear objects.
- **Editing Image and Object** - Perform image and object editing in fine detail. Modify color, width, size and other graphic and image properties.
- **Editing Scanned Document** - Edit the contents of a PDF document that you scanned in to a PDF after running the OCR. In PhantomPDF 6.0, users can OCR scanned documents and chose Editable Text mode. Editable Text mode will allow the resulting OCRed file to be edited using paragraph editing.
- **Adding images and multimedia** to PDF documents makes them more interactive. PhantomPDF allows the users to insert multimedia files in the PDF. Multimedia includes sound, music and video clips.
- **Adding headers and footers, watermarks, and background** with text and images to make your PDFs look more professional. This also helps you to easily view, navigate watermark and place marks on documents.
- **Automatic web link creation from URLs.**
- **Adding Bates Numbers**, which are used in the legal, medical, and business fields to place identifying numbers and date/time-marks on images and documents. These numbers may be solely numeric or may contain a combination of letters and numbers. It is a unique serial

number attached to every page of a document collected and is also a method of indexing legal documents for easy identification and retrieval.

- **Editing page transition** in full screen mode provides a mechanism for users to determine how they want the pages to be turned in full screen mode. This is similar to the transition feature in Microsoft PowerPoint®.
- **Adding bookmarks** which are navigational tools that make your PDF files easier to read. They are most helpful in a document's Table of Contents.
- **Adding reference links** which help authors to lead the readers to related articles, references, or the web pages.
- **Attaching files** enables users to attach PDF files and other types of files to a PDF document.



Advanced Editing

PhantomPDF *Business* provides features users won't find in other PDF editing software. Highlighted features include:

- **Editing PDF using Drawing Tools** - Utilize tools like eraser, cut out, brush, lasso, and more.

- **Manually Importing Fonts** - Import fonts into PDF files when you need them.
- **Changing Page Layout Properties** - Modify page size or content size.
- **Adding Shading to Objects** - Make your objects look spectacular.
- **Converting Text to Path** - Turns text into an object, which is helpful when editing text when you don't have the font on your system.
- **Opening and Editing .ai Files** - No need to purchase other expensive software.
- **Full Function PDF Editing** - Insert new pages or delete old pages, insert new text with embedded or non-embedded fonts, insert lines, add filled or non-filled rectangles or ellipses, and insert images and graphics.
- **Floating Panes** - Customize your workspace by floating and moving the Bookmark Panel and Property Panel to any ideal position of the page.
- **Rulers and Grids** - Provides horizontal and vertical rulers and grids to help users align and position objects precisely on the page, as well as measure the dimensions of the shapes. The Snap to Grid function automatically positions text and other objects to the closest intersection of the grids as you place or move them on the page.
- **Easier PDF Text Setting Actions** - Set the attributes of the text in the PDF by using "Add new text objects" dialog box directly, including font, color, size, horizontal scale, line gap, and more.

Securing PDF Documents

The security features of PhantomPDF give users exceptional control. To provide adequate protection for content of a PDF, you can encrypt and secure the PDF to prevent unauthorized access and safeguard sensitive data.

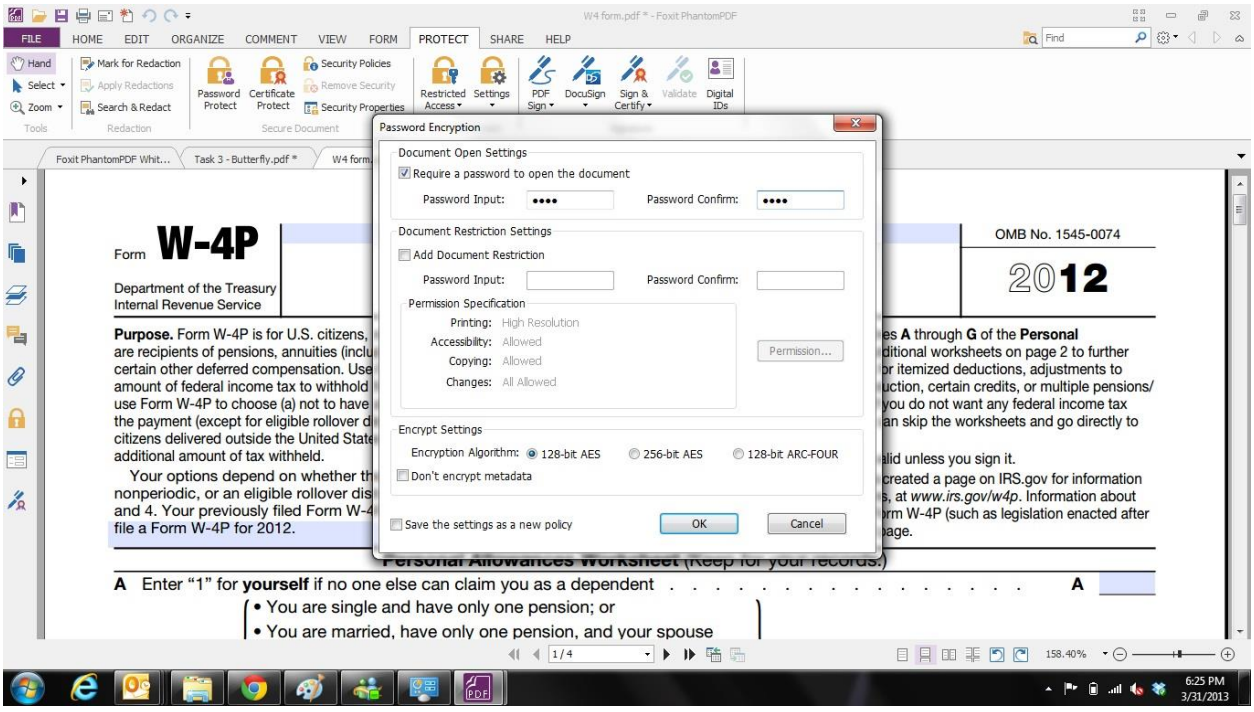
Using Foxit's PhantomPDF, you can add password protection, certificate protection, Microsoft AD RMS protection, and security restrictions to PDF files, limiting who can open, copy, modify (edit and annotations), or print the document.

- **Redaction** allows authors to permanently remove sensitive information from document prior to distribution. Once text or objects are redacted, they have been permanently deleted and can never be revealed.
- **Password encryption** enables authors to add a password to a PDF document to limit access to and/or restrict certain features, such as printing, copying and editing. Access is provided only to the viewers who input the correct password specified by the author.

- **Certification encryption** enables authors to provide access to only a specific set of users whose identities can be verified and managed can have access to the document. A certificate that contains public key and other identifying information is used to encrypt documents. Only viewers with corresponding private keys can decrypt the document that was encrypted using the certificate and obtain access to the document. Generally, if possible, encrypt document using certificates from third- party provider. The advantage of securing documents with certificates is that authors can specify unique permissions for each person. For example, authors can provide selective permissions - permit a person to only fill in forms and comment in document, and permit another person to only edit text or delete pages.

- **Microsoft Active Directory® Rights Management Service** (AD RMS) is Microsoft's Information Rights Management (IRM) solution which protects sensitive information from unauthorized access through technologies such as encryption and rights policy enforcement. PhantomPDF *Business* extends the usage control benefits of AD RMS to all desktop PDF documents, allowing the author the control of document features within each PDF such as who has permission to read and write to a file. Users can also display and insert dynamic security watermarks.

- **Document Certification** indicates you approve of its content and allows you to specify the types of changes that are permitted for the PDF to remain certified.



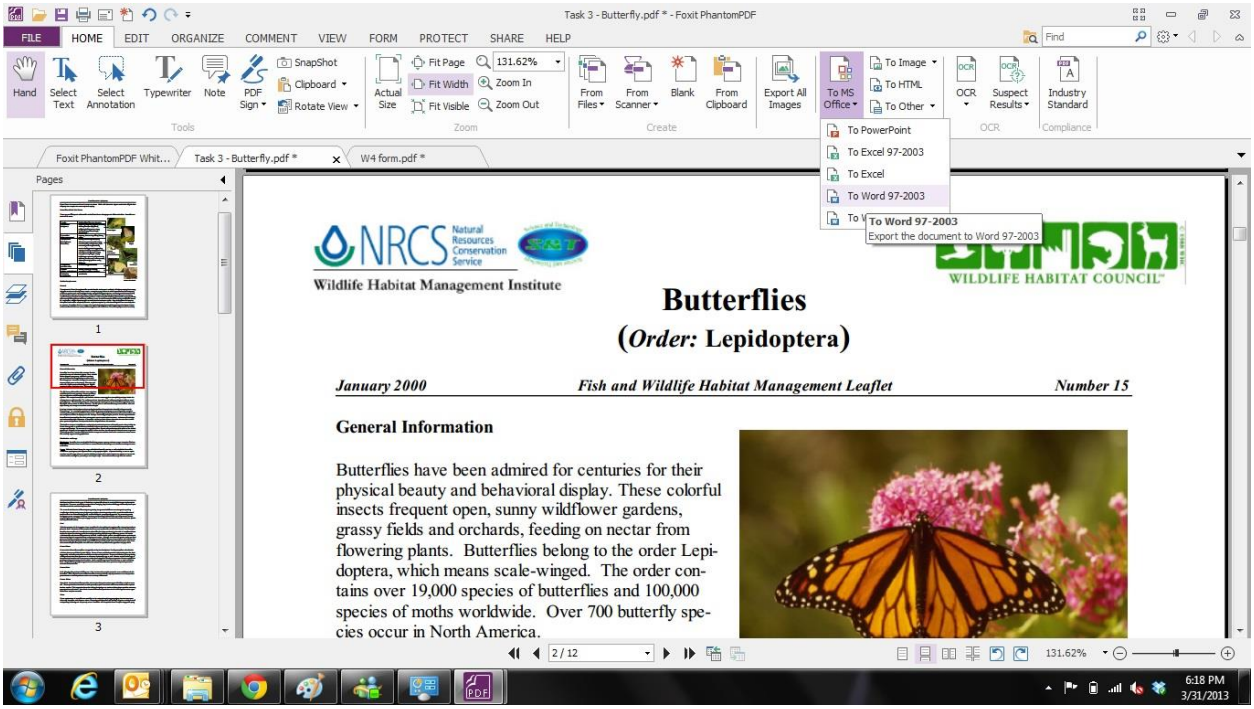
Signing PDF Documents

PhantomPDF allows multiple ways in which you can sign PDF documents:

- **Sign documents with your own handwriting.** PDF Sign signatures can be created from an image of your signature or by writing it yourself on touch enabled desktop systems or tablets. You can create multiple signatures, for example, a full signature and an initial signature. You can password encrypt signatures to secure against unauthorized use of that signature.
- **eSignatures using DocuSign® Integration.** This allows you to easily send, sign and save PDF documents and forms using the industry's most widely used eSignature solution. New users can sign up for DocuSign services. Existing users can log into DocuSign to sign and send PDF documents and forms quickly and easily from PhantomPDF toolbar.
- **Digital Signatures** act 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. PhantomPDF allows users to digitally sign documents and verify digital signatures from others. PhantomPDF will then restrict the viewers' ability to modify the PDF document based on the security settings that is specific to each digital signature.

Sharing PDF Content with other Applications

Many times users need to shares PDF content with other applications. PhantomPDF provides users the ability to convert PDF to Microsoft Word, PowerPoint, and Excel® formats are well as Rich Text Format (RTF), and Hyper Text Markup Language (HTML) formats. In addition, users can copy text and images and paste them into to other applications

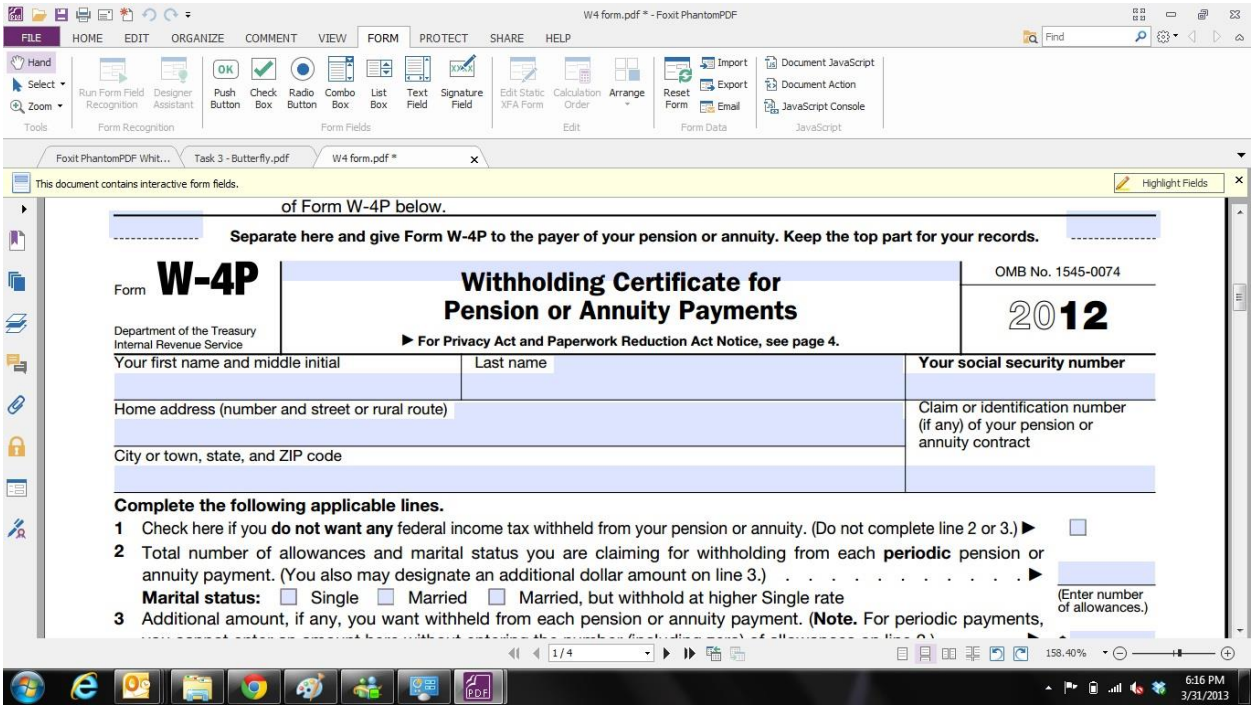


PDF Forms

Foxit PhantomPDF is extremely useful for form filling and form designing. There are two kinds of "form" files. One is a PDF file with fillable fields, which enables you to fill the form directly by clicking the form fields without using other features. This is called an Interactive PDF Form. The other kind of form is a plain PDF file with lines and texts. This is called a Non-interactive PDF Form.

Form Filling

PhantomPDF provides form filling for both traditional PDF forms (also known as Acro Forms) and XML Forms Architecture (XFA) forms; a proprietary specification from Adobe® is not standardized as an ISO (PDF) standard. For interactive forms, PhantomPDF will highlight the fillable fields and provides user friendly navigation to fill in all the fillable fields. For non-interactive forms, the typewriter tools allow users to fill in appropriate fields. In both cases, PhantomPDF allows users to save and print the competed forms.



Form Design

Foxit PhantomPDF 6.0 offers capabilities which allow quick and easy development of interactive PDF forms through automated form field recognition and editing.

- The Form Field Recognition tool will identify likely form fields in PDF documents. The user can then touch up the resulting file to develop interactive forms.
- The Designer's Assistant will allow users to click on a form field and the field will automatically be fitted into the likely space that the field should occupy – providing one-click form field development.
- Automatic PDF form field naming based upon the neighboring text, making developing robust interactive PDF forms quicker and easier.

Using Foxit PhantomPDF tools, you are able to add push buttons, text fields, check boxes, combo boxes, list boxes or radio buttons to create an interactive PDF form and specify their properties. The user can use any of the following form fields using the above mentioned auto form creation capabilities:

- **Push Button** creates an interactive form element to initiate certain predefined actions, such as opening a file, submitting data to a web server, or resetting a form. This button can also be customized with images and text.

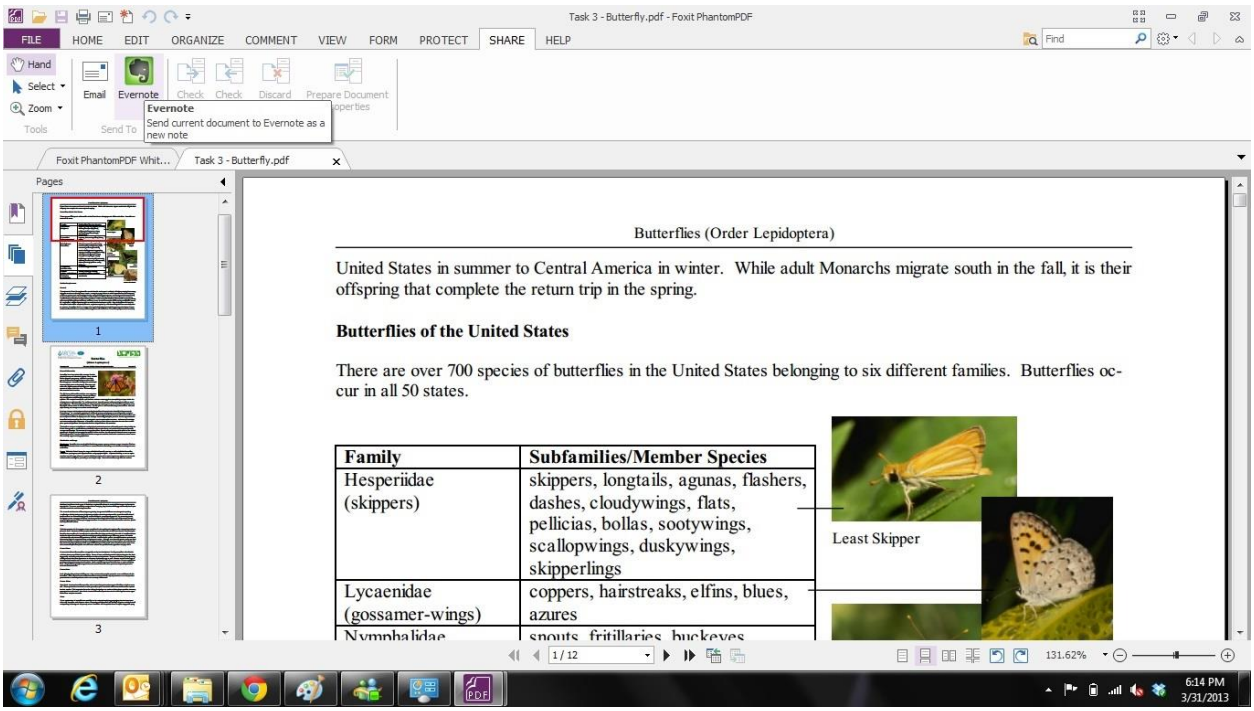
- **Radio Button** presents a group of choices from which the form filler can select only one item.
- **Check Box** presents yes-or- no choices for individual items. If the form contains multiple check boxes, form fillers can select what they want.
- **Combo Box** lets the form filler choose an item from a pop- up menu or type in a value.
- **List Box** displays a list of options the form filler can select.
- **Text Field** lets the form filler type in text, such as name, address, phone number, etc.
- **Signature Field** creates a blank digital signature field for reviewers to sign the document.

Searching and Reading PDF Portfolios

Foxit PhantomPDF can open and read PDF portfolios and perform searches either within a single file or across all the files in the portfolio. A PDF portfolio can have PDF files and non-PDF files such as Word documents, spreadsheets, presentations, or images.

Integrating with Evernote

Evernote is a unified collection of apps that help people remember everything, get things done, and communicate effectively. Foxit PhantomPDF users can now create a PDF as an attachment to an Evernote note. In addition, PhantomPDF provides an Evernote print driver, which will allow any applications with printing capability to convert documents into PDF and automatically put the resulting PDF document as an attachment into an Evernote note.



Bundling with Desktop PDF index

PhantomPDF comes bundled with Foxit's PDF IFilter – Desktop product. PDF IFilter – Desktop is a plugin that allows the Windows indexing service and other Windows search technologies to index PDF files. This allows users to search for PDF documents located on their desktop system using Windows search by using search terms based on the document's content, title, subject, author, keywords, annotations, bookmarks, attachments, and more.

Support When You Need It

Today's enterprises have locations worldwide and have employees who don't always work traditional 9AM to 5PM hours. When they run into problems, wading through knowledge bases or FAQs is not always the best way to resolve their issue. Foxit customers can also call Foxit and get immediate customer support. Foxit provides 24/7 customer support via phone and email. In addition, Foxit User Forum provides users a mechanism to interact with Foxit as well as other Foxit users to obtain help, advice, and best practices.

Summary

Founded in 2001, Foxit is a leading provider of solutions for reading, editing, creating, organizing, and securing PDF documents. Headquartered in Fremont, CA, USA, Foxit has operations worldwide in China, Belgium, Japan, and Taiwan. Foxit is focused on PDF solutions with over 100 experienced PDF engineers. Winner of numerous awards, Foxit boasts over 150 million users, has sold to over 95,000 customers located in over 190 countries.

Foxit has the financial strength, PDF pedigree, and award winning products to offer a sensible and cost effective alternative to Adobe Acrobat. To see for yourself how Foxit PhantomPDF can provide you a great PDF solution at a fair price, try it free for 30 days. Foxit PhantomPDF can be downloaded for a free 30-day trial by clicking here.

Contact Us

Feel free to contact us should you need any information or require support for our products. We are always here, ready to serve you better.

- *Office Address:*
  Foxit Corporation
  42840 Christy Street. Suite 201
  Fremont CA 94538
  USA

- *Mailing Address:*
  Foxit Corporation
  42840 Christy Street. Suite 201
  Fremont CA 94538
  USA

- *Sales:*
  1-866-680-3668 (24/7)

- *Support:*
  1-866-MYFOXIT or 1-866-693-6948(24/7)

- *Fax:*
  510-405-9288

- *Website:*
  www.foxitsoftware.com

- *E-mail:*
  Sales and Information - **sales@foxitsoftware.com**
  Marketing Service - **marketing@foxitsoftware.com**
  Technical Support - **support@foxitsoftware.com**
  Website Questions - **webmaster@foxitsoftware.com**

Copyright © 2013 Foxit Corporation. All Rights Reserved.

No part of this document can be reproduced, transferred, distributed or stored in any format without the prior written permission of Foxit.

Anti-Grain Geometry -Version 2.3

Copyright (C) 2002-2005 Maxim Shemanarev (http://www.antigrain.com) Permission to copy, use, modify, sell and distribute this software is granted provided this copyright notice appears in all copies. This software is provided "as is" without express or implied warranty, and with no claim as to its suitability for any purpose.