

PagePlus 8.0 PDF Edition Companion



Contents

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Welcome

Welcome

Welcome to **PagePlus 8.0 PDF Edition** from Serif—now supporting PDF publishing capabilities for universal document distribution. If you're new to PagePlus 8, see the main PagePlus Companion, and be sure to check out the “Introducing PagePlus 8” QuickTour.

What's new in PagePlus 8.0 PDF Edition...

If you're a returning user, welcome back! You'll find links to details on all these new features in the **Welcome** topic of online help.

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Registration, upgrades, and support

If you see the Registration Wizard when you launch PagePlus, please take a moment to complete the registration process. Just call Serif toll-free and provide the installation number and code shown. We'll give you a personalized registration number in return. Remember, if you need technical support please contact us. We aim to provide fast, friendly service and knowledgeable help.

Installation

What you need to run PagePlus 8.0

If you need help installing Windows, or setting up peripherals, see Windows documentation and help.

Minimum:

- ◆ IBM-compatible Pentium PC with CD-ROM drive and mouse (or other Microsoft-compatible pointing device)
- ◆ Microsoft Windows® 95, 98, 98 SE, Me, 2000, NT® 4.0, or XP operating system
- ◆ 32MB RAM (Windows 95/98), see manufacturer's requirements for other operating systems
- ◆ 160MB (recommended install) free hard disk space
- ◆ SVGA (800x600 resolution, 16-bit color) display or higher.

Additional disk resources and memory are required when editing large or complex documents.

Optional:

- ◆ Windows-compatible printer
- ◆ TWAIN-compatible scanner and/or digital camera
- ◆ Stylus or other input device
- ◆ Internet account and connection required for Web Publishing features and accessing online resources

What you need to know

PagePlus is the easiest desktop publisher around. You don't need any printing or design experience, as the PagePlus Page Wizards can do virtually all the work for you!

However, if you're new to Windows computing, you will find it much easier if, before installing and using PagePlus, you spend a little time becoming familiar with the Windows operating environment.

- ☐ From the Windows desktop, click the **Start** button at the lower left and choose **Help**.

Upgrading from PagePlus 8.0

There's no need to uninstall PagePlus 8.0. Simply insert the Program CD-ROM into your CD-ROM drive as described below. The AutoRun feature will detect a pre-existing PagePlus 8.0 setup and install only the new components you need, leaving your prior program settings intact.

First-time install

To install PagePlus 8.0 PDF Edition, simply insert the Program CD-ROM into your CD-ROM drive. The AutoRun feature automatically starts the Setup process and all you need to do is select the PagePlus Install option and answer the on-screen questions. If the AutoRun does not start the install, use the manual install instructions below.

If you've also obtained the PagePlus 8.0 PDF Edition Resource CD-ROM (see below), install it following the same procedure you used for the Program CD.

Manual install/re-install

To re-install the software or to change any part of the installation at a later date, select **Settings/Control Panel** from the Windows **Start** menu and then double-click the **Add/Remove Programs** icon. Make sure the correct CD-ROM is inserted into your CD-ROM drive, choose **Serif PagePlus 8.0**, and click the **Install...** button. You'll have the choice of removing or adding components, re-installing components, or removing all components.

PagePlus 8.0 PDF Edition Resource CD-ROM

The Resource CD includes over 1900 professionally designed Wizard documents for instantly creating brochures, business forms, calendars, stationery, notices, newsletters, Web sites, and much more. In addition, you'll find a set of illustrated tutorials for a hands-on introduction to the full range of PagePlus features. To find out more, see "How to Contact Serif" at the front of this book.



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Preparing and Publishing PDF Files

Introducing PDF

PDF (short for Portable Document Format) is a cross-platform file format developed by Adobe. In a relatively short time, PDF has evolved into a worldwide standard for document distribution which works equally well for electronic or paper publishing. You can export a PagePlus publication as a PDF file.

The word “portable” sums up PDF’s key advantage, and is the common thread in all of these key features:

- ◆ PDF preserves the publication’s original layout and font properties, incorporating graphics and even hyperlinks along with text.
- ◆ Anyone with the free Adobe Acrobat® Reader (the latest version is supplied with PagePlus) can view PDF files, either from within a Web browser window or directly—for example, delivered over a network or on CD-ROM.
- ◆ PDF documents are uniformly supported in the Windows, Macintosh, and UNIX® environments.
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- ◆ Content is navigable: besides using page navigation buttons, readers can click bookmarks with links to section headings and key elements.
- ◆ Annotations in the form of pop-up “sticky notes” allow comments and sidebars.
- ◆ PDF documents are compact—one-fifth the size of comparable HTML files—for faster transmission.

Steps in PDF Publishing

Prepare the publication following standard print publishing guidelines, and taking the distribution method into account. (See “Layout and design tips” below.)

There are several optional steps you can take to enhance the publication as it will be viewed and/or printed in PDF mode. For example, you can insert **hyperlinks** to enable readers to click on text or a graphic object to open a Web page, a page in your publication, a new e-mail message, or an external file (such as a sound or movie). Hyperlinks are a great way to link table of contents entries to pages in the same document, or branch between documents.

Note that certain Web-specific features other than hyperlinks—such as hotspot graphics, rollovers, Java, and HTML code—are not supported in PDF documents. Only the first frame of animated GIFs will appear.

Another optional step is to prepare a **bookmark list** of major headings. This will appear as a separate list in a special pane when the PDF file is viewed (bookmarks don’t appear when the document is printed). Bookmarks are analogous to hyperlinks: they can link to a specific page or to an anchor (for example, a piece of text or a graphic object) in your publication.

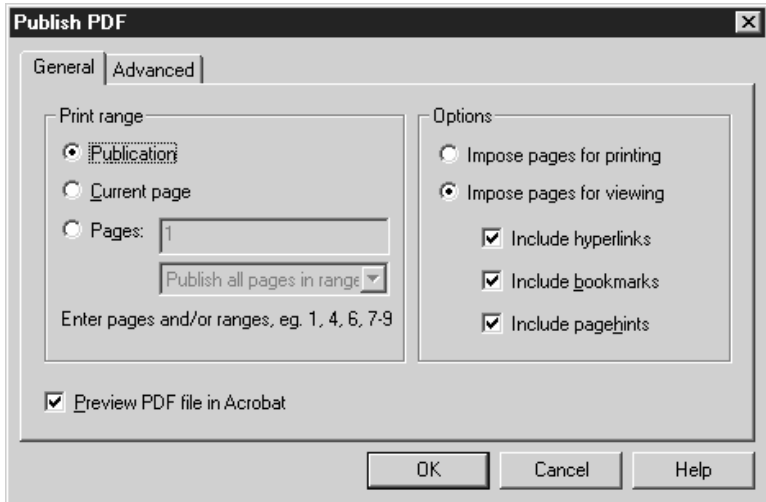
Finally, you can create pop-up annotations by inserting **PageHints** as needed. Both bookmarks and PageHints are covered in the next chapter.

When you’re ready to export, choose **Publish as PDF...** from the File menu and check your export settings as detailed in the following section. (To export the whole publication using defaults, you won’t need to change any settings.) Finally, click **OK** to proceed to export.

If you kept the **Preview PDF file in Acrobat** setting checked, the resulting PDF file then appears in the version of Acrobat Reader installed on your system.

PDF Export Settings

The **General** tab shows basic printout and option choices.

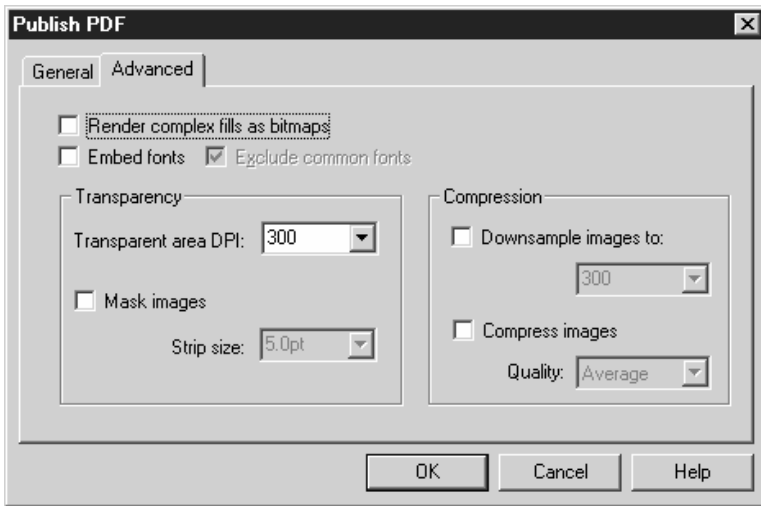


- ◆ Under “Print range,” if you wish to export less than the whole publication, specify the range of pages to export.
- ◆ Under “Options,” select **Impose pages for viewing** to output pages using the same page order as in the PagePlus publication. Select **Impose pages for printing** to produce a page sequence suitable for a folded publication or one that uses facing pages. (We suggest you check with your print vendor before selecting the “for printing” option. Note that when using this option, hyperlinks, PageHints, and bookmarks are disabled.)

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The **Advanced** tab includes settings you may only need to change if you experience less than stellar results on a test run.



- ◆ Objects that use Linear, Radial, and Conical fills display rather slowly in Acrobat Reader. Check the **Render complex fills as bitmaps** option to export such objects as bitmapped graphics, at the expense of larger PDF file size. Uncheck the box to leave the objects as vector graphics.
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- ◆ The “Transparency” settings enable PagePlus objects using applied semi-transparency to be rendered successfully in Acrobat Reader. For the **Transparent Area DPI** setting, we recommend 300 dpi for printer output and 96 for online viewing. (600 won’t improve the visible results, and some print bureaus won’t accept this level of output.) Check **Mask Images** to output these graphics line by line; if unchecked, an opaque rectangular region will be output. You may need to experiment with the Strip Size value to achieve best results.

Smaller values mean smoother lines, but more complex PDF files—with the worst case possibility that older versions of Acrobat Reader may have difficulty opening the file.

- ◆ Images included in the publication can be downsampled and/or compressed for smaller, more efficient PDF delivery. You may wish to alter the default “Compression” settings for specific types of images, for example if a print bureau requests a specific setting. (For details on common image formats, see online help.)
- ◆ Check **Downsample images to** and select a setting; we suggest 300 for print output and 96 for online viewing. If unchecked, images will be output at their original dpi. Check **Compress images** and select a **Quality** setting (Best Quality, High, Average, Low, and Smallest File) to apply a compression algorithm, ranging from least to most compression.

Layout and design tips

As with any publication, take advantage of the range of proofing tools PagePlus affords: spell-checking, automatic proofreading, and Thesaurus, plus the Resource Manager and Text Manager for reviewing usage at a global level. You’ll find full details on these options in the “How to Check Your Work” section of online help.

With PDF, even if you decide to use hyperlinks and/or are working in Web publishing mode, bear in mind that you are essentially creating a paper-based document. This means you don’t have to worry about most of the limitations of publishing to HTML (nonstandard fonts, special text properties, overlapping graphics, etc.).

While you can stick to paper-based design conventions, don’t overlook the fact that some readers may want to peruse your PDF onscreen. For example, text readability is an important consideration. Conventional wisdom states that sans-serif fonts are more legible onscreen, but run some tests and let your own eye be the judge. As a rule of thumb, increase leading somewhat and use slightly narrower line lengths for onscreen text.

Font accuracy is of course a big reason for using PDF in the first place... but you still need to plan ahead. Acrobat Reader will substitute fonts for those you've used if it turns out the fonts are neither available on the user's system nor embedded in your PDF. Acrobat Reader v3.0 doesn't support TrueType fonts and will always substitute! And even using "plain vanilla" Windows fonts won't guarantee WYSIWYG display on another operating system. Ideally, you can employ just one or two attractive fonts (that's a good design rule anyway), and embed them without increasing the file's size too much. Embedding fonts has less of a relative impact on the file size of documents that are longer/larger to begin with. The alternative is to use more ordinary fonts (e.g. Arial/Helvetica or News Gothic families) without embedding.

Finally, complex fills output in vector format slow down the onscreen display of a PDF page; but if converted to bitmaps they expand the file size. So there's no easy solution but to use them sparingly!



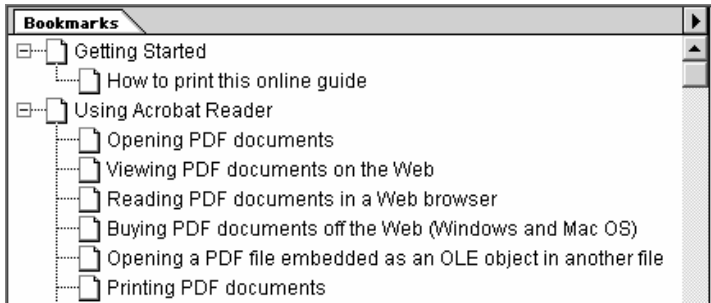
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Using Bookmarks and PageHints

Using Bookmarks

Bookmarks are optional links that appear in a separate pane of the Acrobat Reader when a PDF file is displayed. Typically, a bookmark links to a specific location such as a section heading in the publication, but it can also link to a document page.



If you're exporting a multi-page or multi-section publication to the PDF format for onscreen viewing, creating a bookmark list will make the content a great deal more accessible. In general, the list should include top-level headings such as chapter heads, contents, or menu. See "Tips for PDF bookmarks" below for further design suggestions.

The mechanics of creating a PDF bookmark list are quite simple. For example, to create a basic list with bookmarks to section heads, you simply proceed forward through the publication, inserting a bookmark for each heading. Bookmarking a specific location (for example, a piece of text or a graphic object) entails placing an anchor at that location; the anchor serves as the target for the bookmark link. The Bookmark Manager enables you to view all your bookmarks at a glance, organize them into a hierarchy of entries and subentries, and modify or delete existing bookmarks as needed.

Inserting bookmarks

PagePlus provides two basic ways to insert bookmarks. Using the Bookmark Manager allows you to view the whole list and change the level of entries as you work. A faster alternative is to add bookmarks using a simple menu command. Each method has pros and cons; in practice you'll probably end up using both.

If you're bookmarking a specific location in the publication, the first step is to place the cursor at that point in the text, or select an object such as a graphic or text frame. You can also select a range of text (for example, a section heading) if your intent is to use that same text in the bookmark listing. We'll explain how this is done in a moment.

You can also bookmark a page in the publication, and in this case the cursor location doesn't matter.

As mentioned, you have two options for creating the actual bookmark. One is choose **Bookmark...** from the Insert menu. Pressing **Ctrl+R** is the equivalent keyboard shortcut, or you can right-click and choose **Insert Bookmark...**

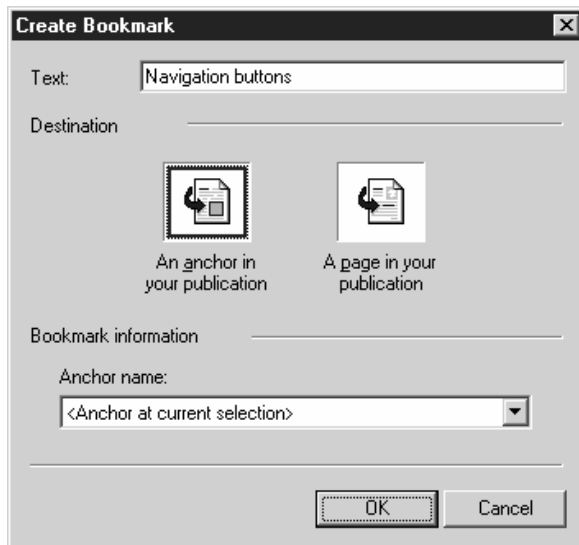
The other option is to open the Bookmark Manager first (choose **Bookmark Manager...** from the Tools menu).



In the bookmark tree, select the entry *below which* you want to create the new bookmark. Check **Create as sub-entry** if you want the new bookmark nested as a “child” of the selected entry. If you leave this box unchecked, the bookmark will appear on the same level as the selected entry. In the illustration, the next bookmark will be created below (and on the same level as) “Links”. When you've made your selection, click the **Create...** button.

It's worth noting that if you're simply adding bookmarks in series, it's quicker to use the **Insert/Bookmark...** command as you move through the publication, thus avoiding the need to reopen the Bookmark Manager each time. When you use the menu command, PagePlus automatically builds the list downward, placing each new bookmark below the previous one. (To add bookmarks in the middle of the list, simply open the Bookmark Manager and select any existing bookmark below which new bookmarks should be added.) Once you've created your bookmarks, you can return to the Bookmark Manager to double-check and (if necessary) reorder the list, as described below.

Whether you've used the menu command or the **Create** button, either action displays the Create Bookmark dialog, with a choice of destinations.



The **Text** field shows the range of text you selected if any (for example, a section heading). You can leave this if it's suitable for the bookmark text or edit it as needed. Enter new text if the field is empty.

Click to select the bookmark destination type, and then enter the destination.

To bookmark a specific location, choose **An anchor in your publication**. To place a new anchor at the cursor location, select **<Anchor at current selection>** from the list below. You'll then be prompted to enter an anchor name (with the bookmark text as the default); edit the name if you like and click **OK**. To bookmark a previously placed anchor, simply choose it from the list.

To bookmark a specific page in the publication, select **A page in your publication** and select the target page number from the drop-down list.

Once the information is correct, click **OK** to confirm your choices.

Managing bookmarks

Here's where the Bookmark Manager comes into its own—providing convenient drag-and-drop management of bookmarks in your list.

To display the dialog, choose **Bookmark Manager...** from the Tools menu. You'll see the bookmarks in your publication displayed as a tree with collapsible entries and sub-entries. The **Create...** button lets you add new bookmarks, as explained above.

To move a bookmark to a new location in the tree, drag it into position. To edit a bookmark, select it and click **Modify....** The Bookmark dialog appears, and you can edit the bookmark text or redefine its destination. Click **OK** to confirm choices and return to the Bookmark Manager. To delete a bookmark, select it and click **Remove**.

Unlike hyperlinks, bookmarks also work as actual links within PagePlus publications! You can use the Bookmark Manager as a jumping-off point to any bookmarked entry. To jump using a bookmark, simply select it in the list and click the **Go To** button.

Tips for PDF bookmarks

As a publication designer, keep in mind that to the user, a bookmark list is a convenient jumping-off point to the major sections. In Acrobat Reader, it's always available (can even be undocked as a floating window) regardless of where the user happens to be in the document.

By all means, provide a basic bookmark list to top-level headings—but (especially for complex publications) make hyperlinking the table of contents your next priority. Despite their convenience, bookmarks are no substitute for a detailed TOC. If the document structure has lots of headings or nested subheads, scrolling the bookmark list and expanding bookmark levels becomes a thankless chore for the user. A table of contents can show the whole expanded structure, and it's printable as well. You can create the table of contents right in PagePlus, then add hyperlinks to each page listed.


Acrobat Reader's bookmark pane is initially rather narrow. Users can expand it, and recent versions of the Reader display tooltips for overlong bookmarks, but you should still try to shorten bookmark text as much as possible. Deleting extraneous bookmark text makes for easier at-a-glance viewing.

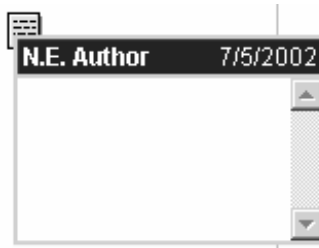
Double-check your spelling! Bookmark errors won't get trapped by the spell checker, and it's an embarrassment to have your misspellings "front and center" for all to see!

Using PageHints

PageHints are like "sticky note" that you can attach to your publication at any position on any page. They've been a feature of PagePlus for some time—but now, when you publish a publication as a PDF file, PageHints become **pop-up annotations** that readers can view. You can choose from a variety of new icons to identify different types of PageHint:

Inserting PageHints

To create a PageHint, choose **PageHint...** from the Insert menu. You'll see the  cursor. Click where you initially want to place the PageHint and a text box/icon combination appears onscreen.



The two objects together comprise the PageHint. The text box titlebar initially shows the publication's Author as defined in **File/Properties...** (or "Default" if there's no Author listed) as well as the current date.

Type your annotation text into the box. As long as the text box remains open, you can continue to type into it and make editing changes. You can leave the box open as you continue to work in PagePlus, and have more than one open at once. To close or reopen a text box, click its associated icon; the box reopens at its last location. (You can also right-click the titlebar and choose **Close PageHint**.) The state of the box (open or closed) when you publish the PDF will match its current state in PagePlus, so it's up to you whether to leave boxes closed or open them for your readers.

You can change the PageHint's icon type or its titlebar text by right-clicking the icon or titlebar and choosing **Properties....**



To access standard Cut, Copy, Paste, and Delete commands, right-click on the text. Simply drag the icon to reposition it, or drag the text box's titlebar to move it. Note, however, that in order to be included in PDF documents, PageHint icons must be within the page area, not on the pasteboard. Text boxes are resizeable, too: simply drag from a corner. Finally, to realign the text box with its icon, right-click the icon and choose **Reset PageHint Location**.

PagePlus Keyboard Shortcuts

Menu shortcuts

Press...	To...
Alt + underlined letter in menu name	Display menu
Underlined letter in menu item	Send command

Function-key shortcuts

Press...	To...
F1	Display the Help Contents screen.
F7	Run the Spell Checker
Shift+F7	View the Thesaurus

Esc (Escape)-key shortcuts

Press the Esc key when...	To...
Sizing, moving, or creating an object	Cancel the operation

Shift-key shortcuts

Hold down Shift key when...	To...
Moving an object	Constrain the movement to horizontal or vertical. To switch directions, release and then press Shift again
Creating and resizing	Constrain the operation (in general)
Drawing a line	Constrain angle to multiple of 45 degrees
Drawing a box	Draw a square
Drawing an oval	Draw a circle
Resizing a picture	Allow free resizing. Keep Shift up to preserve aspect ratio (proportion) of original picture
Selecting a text region	Highlight the text region
Using Select All	(If you have an object selected) Select only objects <u>of the same type</u> as the selected object.
After drawing a line, box, or shape	Retain the current graphic tool instead of reverting to Pointer

Ctrl (Control)-key shortcuts

Hold down Ctrl key and...	To...
Drag an object	Duplicate the object (press Ctrl first)
Press E	Edit selected story in WritePlus
Press F	Run Find & Replace
Press G	Display the Import Picture dialog
Press K	Insert hyperlink
Press R	Insert bookmark
Press T	Import text file into selected frame
Press Tab	Switch between open PagePlus windows; (if insertion point in table) insert a tab character
Press Alt+X	AutoFit text in selected frame
Press a number key	Switch to a particular Zoom view (e.g. 1 = 100%). For specifics, see the View menu.

Character shortcuts

Press...	For...	Character Name...
Ctrl+Alt+8	●	Bullet
Ctrl+Alt+D	†	Dagger
Ctrl+Alt+G	‡	Double dagger
Ctrl+Alt+U	—	Em-rule or dash
Ctrl+Alt+C	©	Copyright symbol
Ctrl+Alt+R	®	Registered symbol
Ctrl+Alt+T	™	Trademark symbol
Ctrl+Alt+Q	‘	Single open quote
Ctrl+Alt+W	’	Single close quote
Ctrl+Alt+2	“	Double open quote
Ctrl+Alt+3	”	Double close quote
Ctrl+Alt+4	€	Euro symbol (European keyboards)
Ctrl+Alt+A	‘ ’	Comma space (width equal to that of comma in the typeface; for lining up columns of numbers with commas as separators)
Ctrl+Alt+0(zero)	‘ ’	Digit space (width equal to that of ‘0’ in the typeface; for lining up columns of numbers)
Ctrl+Alt+M	‘ ’	Em space (equal to point size of typeface)
Ctrl+Alt+N	‘ ’	En space (equal to half of point size)
Ctrl+Alt+I	"	Inch mark
Ctrl+Alt+F	'	Foot mark