

# **Options Online Guide**

Version 3.01  
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# Options Online Guide

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## **Options Online Guide**

### **What is Options?**

Options is an Acrobat plug-in for setting the open, security, general information (Title, Subject etc.) and other parameters of all the PDF files within a selected directory (or folder). Two neat features about Options are:

1. It will optionally process recursively down from the specified directory.
2. It enables the user to process security-protected files, at least, those to which the user possesses the appropriate passwords.

### **What's New in Version 3?**

- A new tool bar that works well with Acrobat X and later versions (and improved UI in 3.01)
- Options functionality is available via Acrobat's Action Wizard so you can create batch processes
- The OLE server has been removed (use actions instead)

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### **System Requirements**

Options works with Acrobat versions 2.1 and later — because it actively alters PDF files it is *not* available as a Reader plug-in.

### **How Does it Work?**

There are three stages to using Options to apply options to a batch of PDF files:

1. Specify required open, security options, and other options to be applied later.
2. Select a folder/directory (and optionally choose to process all sub-folders/directories by selecting the Recursive option).
3. Apply the specified options.

### **How Can I Make it Work?**

1. Interactive use using dialogues.
2. Putting PDF files in watched directories.

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### **Overview**

Options works using settings specified in an options.ini file. This file contains all the settings that will be used on the selected files or directories.

The default options.ini file is stored in Acrobat's plug-ins directory, along with the plug-in itself. Options will use any options.ini file that it finds at the top level of any directory or single file that it is asked to process. This allows different options to be applied to files in different directories.

As Options processes files it creates a log file called options.log in the same directory as the options.ini file that it is using.

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### **Options Menu Items**

Options adds two menu items and a tool bar to Acrobat:

#### **Help > About Third Party Plug-ins > Options**

Selecting this displays information about the version of Options that you are running.

#### **Help > Plug-in Help > Options**

Clicking on this menu item opens this Options Online Guide.

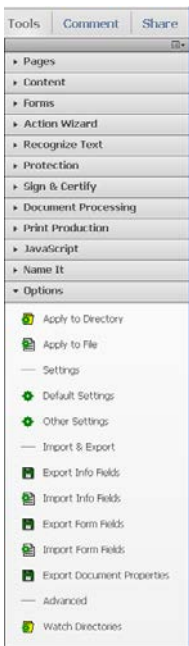
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# Options Tool Bar

The Options tool bar appears in different ways depending on your Acrobat version:

- Acrobat X or later: click on Tools to show the right-hand tools pane, then click on Options, as shown here
- Acrobat 6, 7, 8, 9: see the Advanced > Options menu
- Acrobat 5 or earlier: see the Plug-ins > Options menu

Options has ten menu items grouped into: Apply, Settings, Import & Export, and Advanced as described overleaf.



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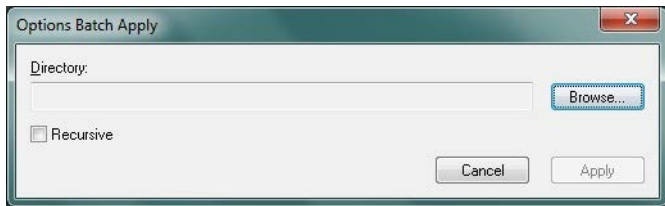
- The ‘Apply To’ group contains the commands for applying the options to particular files or directories.
- The ‘Settings’ group contains commands for setting default and custom options settings.
- The ‘Import & Export’ group contains commands for both importing and exporting document information fields and form fields from/to a specified CSV file.
- The ‘Advanced’ group enables the user to specify the watched directories.



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### Apply Group

**Apply to Directory...** This command displays the Options Batch Apply dialogue. The user can select a directory using the Browse button in this dialogue, and apply the option settings to the PDF files within this directory.



The Apply button tells Options to process all the PDF files in the selected folder.

If the Recursive check box is set, Options processes the PDF files in the selected folder *and* all the folders nested within it. This option is powerful and can be dangerous if incorrectly selected. In order to help prevent accidental use, the **Recursive** check box is

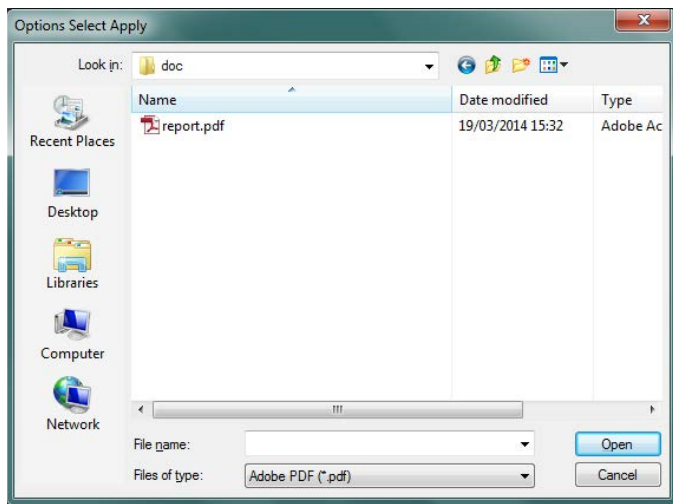
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never set on opening the Select Folder/Directory dialogue.

The option settings used are those from an options.ini file in the selected directory or, if there is none, from the default options.ini file (in the plug\_ins directory).

**Apply to File...** Selecting this menu item displays the Options Select Apply dialogue. The user selects a file to apply the option settings to. The option settings used are from an options.ini file in the same directory as the chosen file, or else the default settings from the options.ini (in the Acrobat plug\_ins directory). This dialogue will only allow one file to be selected at a time.

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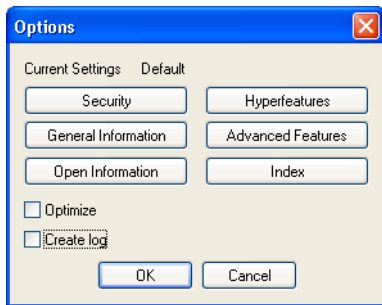
### Settings Group

**Default Settings...** This menu item displays the main Options dialogue, which allows the user to alter the Options settings to be used in the apply functions. The dialogue displays the name of the Options setting file that it is using — in this case ‘Default’ indicates that the settings are stored in the options.ini file in the Acrobat plug-ins directory.

The Optimise check box is used to tell Options to use the Acrobat optimisation facility when it is saving documents.

Turning on the logging using the “Create log” check box will create an options.log file in the same directory as the options.ini file in use. Logging is also sent to the debug output and can be viewed dynamically using a free tool such as DebugView from Microsoft.

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On the dialogue there are six buttons.:

- Security enables the various security options and passwords permitted on documents to be set.
- General Information sets information such as the document's title and author.
- Open Options sets the manner in which the document opens — display bookmarks or thumbnails, starting page number etc..
- Hyperfeatures enables the user to apply a

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standard feel to the various hyperfeatures within the document.

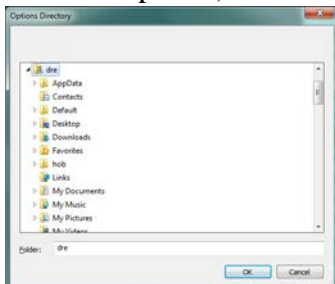
- Advanced Features enables pages to be reversed, page orientation (landscape or portrait) to be set, hyperfeatures to be copied from a template, and text form field values to be set.
- Index allows you to specify Acrobat Search indexes to attach.

Changes here affect the default option settings file.

**Other Settings...** This command displays the Options Directory dialogue, enabling the user to select a directory in which to create or open an options.ini file. Saving such a file in a directory determines how Options will behave if this directory is selected in the Options Batch Apply dialogue (thus

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overriding the default options).

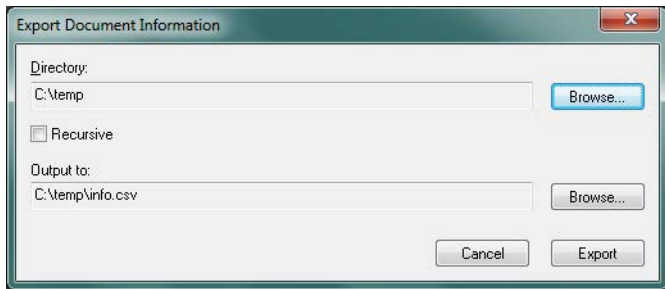


You can set the required options by clicking on the OK button, which will display the same dialogue as in “Default Settings...” on page 12, except that the “Current Settings” item will display the directory name selected instead of “Default”.

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### Import & Export Group

**Export Info Fields.** This dialogue allows the user to select a directory from which to create a CSV file containing the names of all the PDF files and their respective document information field settings. All standard and custom fields are included in the output. The user selects the directory to process using the Browse button next to the Directory item.



The Recursive check box enables the user to choose whether to create the CSV file for only those PDF



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files within the chosen directory or within all the chosen directory's subdirectories as well (when the box is checked).

The user determines the CSV file to save the information in by clicking on the Browse button. Once a file has been selected the “Output to:” item will show where the data will be saved. The chosen file will be overwritten if it exists already.

The PDF file information is saved to the CSV file by clicking on the Export button.

The CSV file can then be edited in a text editor or in a spreadsheet so that different values can be set for the fields. A typical file might look like the following:

```
C:\temp\file.pdf, "Title", "Subject", "Author", \
"Keyword1, keyword2", "Creator=FrameMaker
5.1.1", "MyField=Pasture land"
```

Note that the fields are separated by commas, with the file name first, followed by Title, Subject, Author

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and Keywords fields (quoted). Any custom fields then follow in the format:

```
"CustomKey=CustomValue"
```

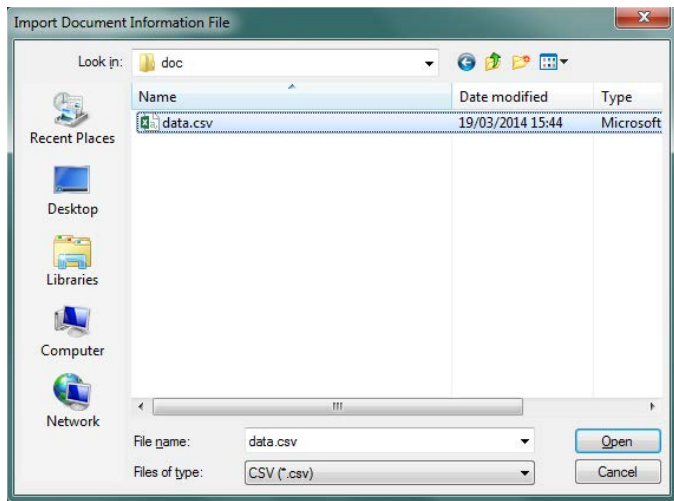
So, in the example on the previous page, there is a custom field called “MyField” with value “Pasture land”.

The quoted value may include spaces. Double quotes within the value may be included by using a pair of double quotes, e.g. "QuoteField=a ""quote"" was there" would set the field QuoteField to:

```
a "quote" was there
```

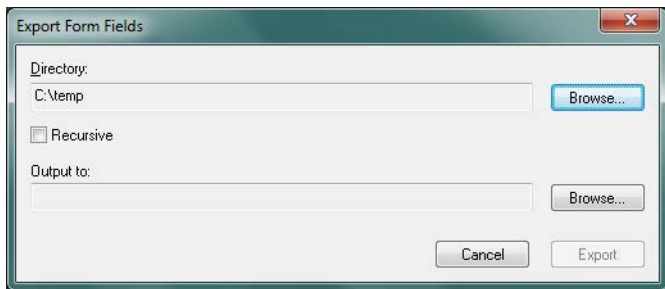
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**Import Info Fields.** This menu item enables the user to select a CSV file containing a list of PDF files and information field key / value pairs, as created by the Export Info Fields menu item. Once a CSV file has been selected the user can process the files specified in the CSV file by pressing the Open button.



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**Export Form Fields.** This dialogue is similar to the Export Information Fields dialogue but processes Form Fields.



The user uses the Browse button to select a directory from which to create a CSV file containing the names of all the PDF files and their respective form fields.

The Recursive check box enables the user to choose whether to create the CSV file for only those PDF files within the chosen directory or within all the chosen directory's subdirectories as well (when the box is checked).

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The user determines the CSV file to save the information in by clicking on the Browse button. Once a file has been selected the “Output to:” item will show where the data will be saved. The chosen file will be overwritten if it exists already.

The PDF file information is saved to the CSV file by clicking on the Export button. **This facility only exports text form field data.**

The CSV file can then be edited in a text editor or in a spreadsheet so that different values can be set for the fields. A typical file might look like the following:

```
C:\temp\file.pdf, "ReportNum=42", "Status=Draft"
```

Note that the fields are separated by commas, with the file name first, followed by the form fields in the format:

```
"FieldName=FieldValue"
```

So, in the example above, there is a text form field called “ReportNum” with value “42”, and another

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field with name “Status” and value “Draft”.

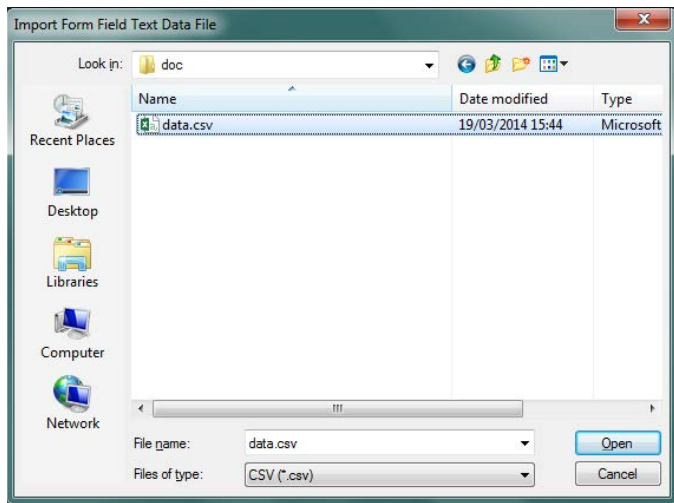
The quoted value may include spaces. Double quotes within the value may be included by using a pair of double quotes, e.g. "QuoteField=a ""quote"" was there" would set the field QuoteField to:

a "quote" was there

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**Import Form Fields.** This menu item enables the user to select a CSV file containing a list of PDF files and text form field key / value pairs, as created by the Export Form Fields menu item.

Once a CSV file has been selected the user can process the files specified in the CSV file by pressing the Open button.



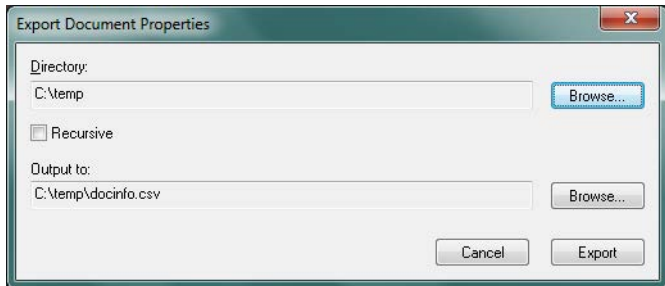
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**Export Document Properties.** The user can export lots of information from a directory of PDF files to a CSV file for import into a spreadsheet (see picture on next page). Properties exported include most of the information you can view on Acrobat's Properties dialogue, including:

- file name
- document info fields (Title, Subject etc)
- application, PDF producer
- created and modified dates
- file size
- page size, number of pages
- security information
- and more...



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### Advanced Group

**Watched Directory...** This allows the user to specify directories which will be watched by Options. Each watched directory will have an In and an Out directory underneath it (which Options will create if they do not exist). When Options detects a new PDF file in the In directory, it will process it using the options specified for the watched directory, if any, or else with the default settings. Once Options has completed the processing, the file will be saved into the Out directory, and the original file will be removed.

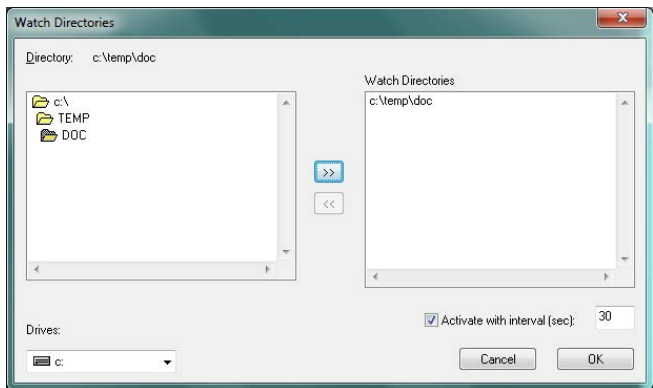
The Watched Directory dialogue allows the user to specify the watched directories, and the period between Options checking them for new files.

The left-hand list is used to select a directory to add to the watched directory list, with the directory name shown above it. The >> button will add the selected directory to the watched directory list.

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The right-hand list shows all the directories in the watched directory list. If a directory is selected in this list it can be removed by pressing the << button.

The Activate check box activates the watched directory mode. The interval setting, in seconds, must be set to indicate the frequency that Options scans for files.



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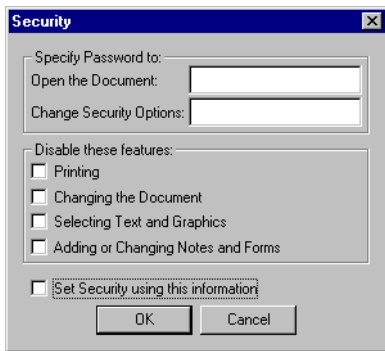
# **Setting up Options**

The sections on the next pages describe how to set up Options settings (default or directory-specific) using the dialogues from one of the settings menu items (see “Settings Group” on page 12).

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### Security

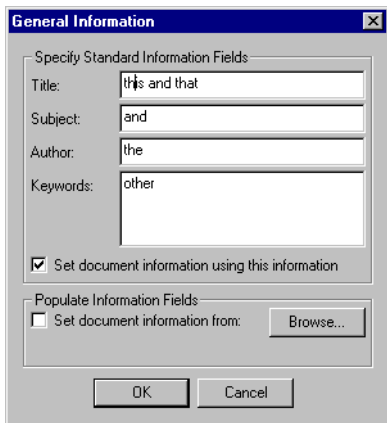
The Security dialogue enables the user to change the open and security passwords to be applied to all the documents. It also allows the setting of permissions for restricting printing, changing the document, selecting text and graphics, and adding or changing notes. The ‘Set Security using this information’ check box enables users to maintain security settings but opt not to use them. The security options chosen in this dialogue will only be used if this check box is selected.



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### General Information

The General Information dialogue enables the user to set document information fields.



The dialogue is split into two parts: the first, Specify Standard Information Fields, is used to explicitly specify the four standard information fields; the second, Populate Information Fields, specifies a

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CSV file which lists PDF files and the information fields to set in them.

Each section of the dialogue is activated by a check box. Only one part can be active at any time, so you can *either* “Set document information using this information” *or* “Set document information from [the CSV file]”. If the user does not wish to set *any* information fields then neither of the check boxes should be checked.

If the user chooses to explicitly set the standard information fields then the values placed into the Title, Subject, Author and Keywords areas are used to set these values for *all* the documents that are processed. If any of these are left blank then the current document's value for that field is left alone.

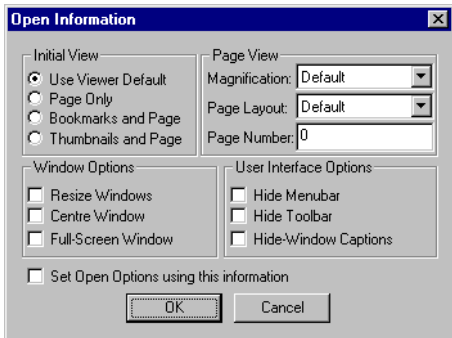
If the user chooses to set the document information fields from a file “Populate Information Fields” section must be completed. The browse button can be used to search for a suitable CSV file to use as input.

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### Open Information

The Open Information dialogue is used to set the document's opening options.

The user can set the document's initial view (page only etc.), the magnification, the page layout (single or two column), the opening page number, the window options (full-screen etc.) and whether menubar etc. should be displayed. These are all the standard options available in Acrobat (version 3.01 and later versions).





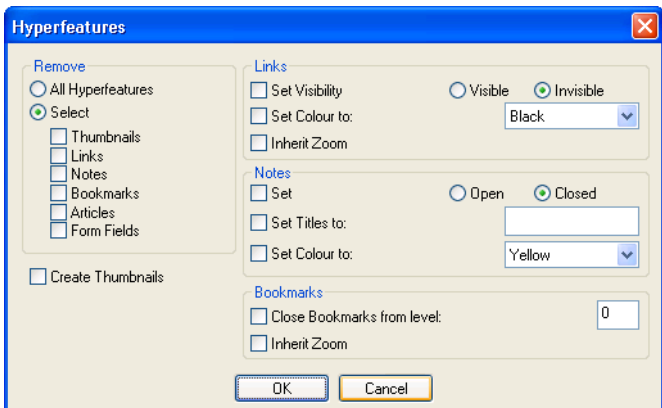
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The “Set Open Options” check box enables the user to keep a standard set of values but not have to use them. When checked this check box ensures that the values specified are used on the selected documents.

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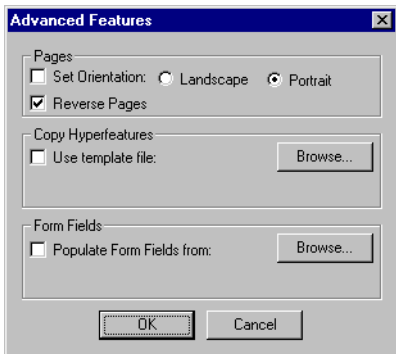
### Hyperfeatures

The Hyperfeatures dialogue allows the user to remove hyperfeatures (e.g. notes, links, bookmarks) from the target files; change the visibility of links; change the colour and appearance of links and notes; and make links use inherit zoom view. It can also create thumbnails, and selectively close bookmarks from a given level (the top-most bookmark, i.e. the one that is not indented at all, is at level 0).



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### Advanced Features



This dialogue enables the user to do some advanced things with pages, hyperfeatures, and form fields.

The Pages area allows a user to alter the page orientation (to portrait or landscape), and to reverse the page order.

**Copy Hyperfeatures.** Under Copy Hyperfeatures the user can specify that hyperfeatures — links, article threads, notes, bookmarks, and form fields — are copied from a template PDF file. This means that

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you can set up a template file with the links, bookmarks etc. that you want copied onto the files being processed. Options will duplicate all the hyperfeatures onto each page of the PDF files being processed. If the template PDF is more than one page, then the first page's hyperfeatures from the template get copied onto the first page of the file being processed, the second page's hyperfeatures onto the second page and so on. This feature might be used to specify all the hyperfeatures on a multi-page file, or a 2-page file might specify different hyperfeatures for odd and even pages.

The “Use template file” check box determines whether a template file is to be used — the file to be used is displayed in the Copy Hyperfeatures section of the dialogue. The browse button in this section can be used to select a template file to use (any PDF file). This setting interacts with the remove hyperfeatures function in the Advanced settings. Both these options can be used at the same time since the removal is carried out before copying hyperfeatures.

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Copying hyperfeatures specified in this dialogue is guaranteed to take place *after* any hyperfeature removals.

**Form Fields.** The “Populate Form Fields from” check box can be used to specify that Options should be filling in text form fields using the data from the designated CSV file, as listed in the Form Fields area. The browse button can be used to select an appropriate CSV file. This file specifies a list of PDF files and the information to use, and could be created using the Export Form Fields function. Currently Options only populates text form fields.

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### Index

This dialogue displays the Acrobat Search index (\*.idx) which will be attached to the documents when processed with one of the Apply menu items. Indexes can be added to or removed from the list by using the Add and Remove buttons respectively.



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# **Using Options with Acrobat's Actions and Batch Processing**

Acrobat provides a means of processing one or more files according to a multi-step batch processing sequence that you select — this is called a PDF Action in Acrobat 10. You can use an existing batch processing sequence or action, or set one up. Using Acrobat's batch processing or actions will enable you to combine more steps than just using Options. Refer to Acrobat's help to find out how to set up your own batch sequence or action.

Some of the Options functionality has been made available within the batch processing commands, and either appears under an Options or “More Tools...” section within the commands list. This enables you to run Options commands and other Acrobat commands with just one click!

See overleaf for functionality included in Acrobat's actions and batch processing.

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Options functionality in Acrobat actions and batch processing:

- Reverse Pages
- Flatten Form Fields
- Search Index
- Copy from Template
- Hyperfeatures



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# Options Initialisation File Specification

If the user wishes to manually set up Options, the Options initialisation file (options.ini) specification will be required.

*It is recommended that you do not edit this file. This information was previously provided for advanced users using the Options OLE server, but this functionality is no longer available.*

The Options initialisation file is designed in the same way as a standard Windows initialisation file with groups defined by a section title in square brackets, e.g. [section], followed by key/value pairs in the form “key=value”.

All the values are simple strings of characters, which will be interpreted either as a text string or a number depending on the context. For example:

```
title="Options manual"  
pagenum=23  
fullscreen=1
```

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Some keys represent boolean values and so only take the value 0 or 1 — 0 for false and 1 for true.

In general, the options.ini file is split up into sections that correspond to each dialogue used in Options..

On the following pages, the word *string* will mean a string value such as “fly a kite” (with or without quotes); *integer* will mean any integer value such as 0 or 28; *float* will mean any floating point number such as 1.5; *n..m* indicates a range of integer values such as 0..5 and *boolean* will mean either 0 for false or 1 for true. File names, where required, should be specified using full paths. The keys may be upper or lower case, but the values are case sensitive.

For example, part of an options.ini file might be specified as:

```
[info]
title=string
setinfo=boolean
```

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with a valid example being:

```
[info]  
title="fly a kite"  
setinfo=1
```

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### Information Section

[info]

This section corresponds to the General Information settings. Either the four standard document information fields can be set directly here (to be the same across all files processed), or a CSV file containing document information field data can be specified (see “Export Info Fields” on page 16).

[info]

```
title=string  
subject=string  
author=string  
keywords=string  
setinfo=boolean  
infofile=string  
setinfofile=boolean
```

The *setinfo* key has a boolean value indicating whether this info section data is to be used to populate the four standard document information fields. *infofile* is the name of the CSV file containing the document information field data, and will be used if *setinfofile* is true.

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### Security Section

[security]

This section defines the required security settings. The open and security passwords can be set if required, and the four standard security restrictions (printing, changing the document, selecting text and graphics, and changing notes and form fields) can be requested (e.g. `print=1` disallows printing). Security will only be added if *setsecurity* is true.

[**security**]

`open=string`

`security=string`

`print=boolean`

`changedoc=boolean`

`select=boolean`

`changenotes=boolean`

`setsecurity=boolean`

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### Open Section

[open]

This section corresponds to the Open Information settings. Since there are many settings they will be described individually.

`pagemode=0..3`

This indicates how the document appears on opening as: default, main window only, with thumbnails, or with bookmarks. The options are as defined in the Acrobat Plug-ins SDK as, respectively, PDDontCare (0), PDUseNone (1), PDUseThumbs (2) and PDUseBookmarks (3).

`pagenum=integer`

This represents the page number that the document will open on. Page 0 is the first page in a document.

`zoomtype=string`

This indicates how the page is viewed when first opened: by default this is XYZ (XYZ scaled), but it can also be Fit (fit page), FitH (fit width) or FitBH (fit visible).

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`zoom=real`

This only functions if the page view as specified by *zoomtype* is XYZ and represents the percentage scaling factor divided by 100. For example, a zoom of 150% is represented by `zoom=1.5`.

`pdlayoutmode=0..4`

This indicates whether the document opens in two column mode or not. The options are as defined in the Acrobat Plug-ins SDK as, respectively, `PDLayOutDontCare` (0), `PDLayOutSinglePage` (1), `PDLayOutOneColumn` (2), `PDLayOutTwoColumnLeft` (3), and `PDLayOutTwoColumnRight` (4).

`resizewindow=boolean`

If *resizewindow* is true, Acrobat will resize the Acrobat window to the size of the document page.

`centrewindow=boolean`

If *centrewindow* is true, Acrobat centres its window on the screen.

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`fullscreen=boolean`

If *fullscreen* is true the document is opened in full screen mode.

`hidemenubar=boolean`

`hidetoolbar=boolean`

`hidecontrols=boolean`

Setting these to true causes respectively the menubars, the toolbar or window controls to be hidden when the document opens.

`setopen=boolean`

This determines whether the open settings are applied to the documents in this particular run of Options.



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### Advanced Section

[advanced]

This section specifies the features that can be set using the Advanced dialogue.

```
setorientation=boolean  
landscape=boolean
```

These allow the user to set the orientation of all the pages in the document. If *setorientation* is true then the *landscape* value is used to determine which way each page is displayed (if true, each page is displayed landscape).

```
reverse=boolean
```

If *reverse* is true, the pages in the document are put into reverse order.

```
copyhyperfeatures=boolean  
hyperfile=string
```

If *copyhyperfeatures* is true, the hyperfeatures (annotations etc.) found in the file defined by *hyperfile* will be copied into the document(s).

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`setadvanced=boolean`

*setadvanced* controls whether the values set under the advanced settings section are used or not.

`optimize=boolean`

*optimize* sits in this section although it is not part of the Advanced settings. If true, it specifies that the PDF files are saved with the optimisation on.

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### Target Section

[target]

This section is only used in conjunction with watched directories. It enables the user to specify a file or directory for Options to process and it also enables the user to set a list of known open and security passwords to try on these target files.

```
path=string  
open[1 to x]=string  
security[1 to x]=string
```

*path* is a full path to a file or directory to be processed. The passwords are given as strings following a key generated from “open” or “security” plus a number, e.g.

```
open1=first open password  
open2=second open password  
security1=first security password
```

The passwords must be given sequentially otherwise the later entries will be ignored — e.g. *open1=this, open3=that* will only result in *open1* being set because *open2* is missing.

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There are some special fields in the [target] section for setting the target, and whether to recurse or not.

*recurse=boolean*

If *recurse* is true and the target is a directory, Options will recurse down the following directory listed as a target, processing files in sub-directories too.

*path=string*

*path* is a path to a file or a directory and is a required field.

An example of the use of this section is:

```
[target]  
recurse=1  
path=\temp\docs
```

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### Hyperfeatures Section

[hyperfeatures]

`closebookmarks=boolean`

`closebookmarkslevel=integer`

If *closebookmarks* is true, bookmarks will be closed at the level specified by *closebookmarkslevel*.

`createthumbnails=boolean`

If *createthumbnails* is true, thumbnails will be created for all pages in the target documents.

`setlinksvisible=boolean`

`linksvisible=boolean`

These values determine whether to set link visibility and, if so, whether the links are to be visible or not.

`setlinkscolour=boolean`

`linkscolourname=string`

If *setlinkscolour* is true the colour of all links is changed to the colour specified by *linkscolourname*. Valid colours are: black, blue, green, cyan, red, magenta, yellow, and white.

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```
setnotescolour=boolean  
notescolourname=string
```

If *setnotescolour* is true the colour of all notes is changed to the colour specified by *notescolourname*. The colours are the same as for *linkscourname* (see above).

```
setnotesopen=boolean  
notesopen=boolean
```

These values determine whether the notes are open or closed.

```
setnotestitle=boolean  
notestitle=string
```

The titles of notes will be changed to *notestitle* if *setnotestitle* is true.

Continued...

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```
rmvallannots=boolean  
rmvnotes=boolean  
rmvarticles=boolean  
rmvbookmarks=boolean  
rmvlinks=boolean  
rmvthumbnails=boolean  
rmvformfields=boolean
```

These remove various hyperfeatures. If *rmvallannots* is true, all annotations (links, notes, etc) and other hyperfeatures will be removed, else they may be removed individually — notes, articles, bookmarks, links, thumbnails and form fields respectively.

## Options Section

[options]

```
[options]  
log=boolean
```

This section is for general settings for the plug-in. If *log* is false, logging will be turned off, if it is true logging will be on. Log files appear as options.log in the same directory as the options.ini file being used.

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### Watched Directory Section

[watch]

[watch]

*setwatch=boolean*

*dir[1 to x]=string*

*interval=integer*

If *setwatch* is true, the directories specified by *dir1*, *dir2*, ... will be watched every *interval* 1/60ths of a second.

### Index Section

[indexes]

*index[1 to x]=string*

*index1*, *index2*, ... specify the full path to Acrobat Search indexes (e.g. *c:\mydocs\index.pdx*) which should be attached to the target documents.



# Processing Documents with Existing Passwords

Options runs as a two-pass process. The first pass checks that all the files in the selected folder(s) can be processed — that they are writable (i.e. not read-only) and that they are alterable within Acrobat (i.e. security permitting). The second pass applies the selected options to the folder(s).

To aid users altering batches of files with *existing* password protection, Options asks for open and/or security passwords as necessary during the first pass. These passwords are stored for use in the second pass, making the changing of open and security passwords on batches of documents very simple.

If some documents are read only, or the necessary open and/or security passwords for them are not known, Options will skip these documents and process the remaining ones. The user can thus selectively process documents in a folder by open or

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security password or by making some documents read only. This also enables some documents in a folder to be processed without knowing the passwords to all the documents in it.

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### **Credits**

<b>Design</b>	David Evans
<b>Development</b>	Peter Sutton, David Evans
<b>Quality Assurance</b>	David Evans, Gareth Black

### **Further Information**

Options is an Acrobat plug-in from Merlin Open Systems. For information about our other products and services please contact us as shown below, or visit our Web site:

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Nottingham, United Kingdom

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