



IntelliPDF BATES^{1.5} STANDARD & PROFESSIONAL

Plug-in for Adobe[®] Acrobat[®]

User Guide

www.intellipdf.com



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1. GENERAL INFORMATION








1.1 OVERVIEW

The history of Bates numbering goes back to 1890's, when *Bates Manufacturing Co.* in New York State invented an automatic hand-held numbering machine. "Bates Stamping" means the process of placing Bates Numbers on a page. Many companies are still using Bates machines to stamp their documents, a time-consuming, labor-intensive process.

IntelliPDF BATES is an easy-to-use plug-in for Adobe Acrobat that creates custom Bates Stamps and uses them to stamp PDF documents. The IntelliPDF BATES can create up to 32 stamps per page (16 for Standard version). The stamp can consist of up to 8 elements (numeric, alphabetical, alpha-numeric, roman numerals etc.) up to 32 characters long.

The user controls every aspect of the stamp's creation: the font and color, the background color, the stamp increments, the stamp placement and many others. This flexible structure allows for accommodation of a wide variety of stamping specifications.

IntelliPDF BATES is more feature rich than other similar tools available on the market today. Some of the distinctive advantages of IntelliPDF BATES are:

-  The exact position of the stamps will remain consistent even if the given document contains various sized pages (letter, legal, etc.);
-  Allows you to stamp copies of a source document;
-  Enables you to embed various values (dates, time, file name etc.) in the Stamp structure;
-  Stamp increments are user controlled;
-  Batch processing: allows you to stamp multiple files at once;
-  In addition to the 14 fonts provided by Adobe, IntelliPDF BATES plug-in allows you to use all fonts available on your system;
-  Allows you to preview Bates Stamps before stamping process.

1.2 MINIMUM SYSTEM REQUIREMENTS

The IntelliPDF BATES Plug-in requires:

- ☞ PC with Intel® Pentium® processor
- ☞ Windows 98
- ☞ Windows Millennium Edition
- ☞ Windows NT® 4.0 with Service Pack 5 or 6
- ☞ Windows 2000
- ☞ Windows XP
- ☞ Adobe® Acrobat® Version 5.0 or later

1.3 LIMITATIONS OF INTELLIPDF BATES

- ☞ Works only on Windows-based operating systems;
- ☞ Works only with full versions of Adobe® Acrobat® 5.0 or later;
- ☞ The Plug-in does not work with documents that have 40-bit encryption level and have the "No Changing the Document" or "No Content copying or Extraction, Disable Accessibility" option checked. The same applies for the 128-bit Encryption Level when the "General Editing, Comment and Form Field Authoring" or is not selected.

1.4 RESTRICTIONS OF DEMO VERSION

- ☞ A maximum of hundred (100) pages can be stamped on the current document;
- ☞ Up to ten (10) files will be stamped in Batch mode (Batch mode available in PRO version only), but no more than hundred (100) pages in total;
- ☞ A Demo-Watermark appears on each stamped page of any processed document;
- ☞ The "Load", "Save" & "UNDO" features are disabled ("UNDO" feature available in PRO version only);

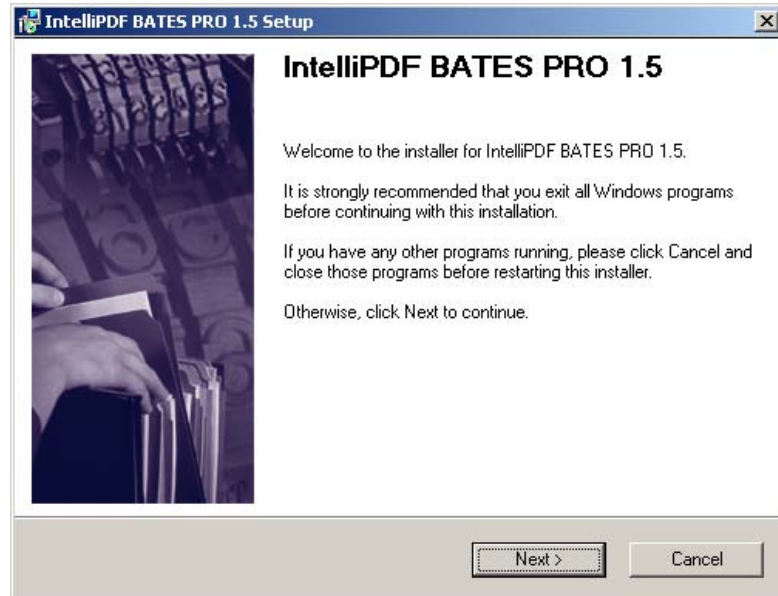
1.5 COMPARISON WITH STANDARD VERSION

The **IntelliPDF BATES** Plug-in is available in two versions: standard and professional. The following table summarizes the differences between the versions.

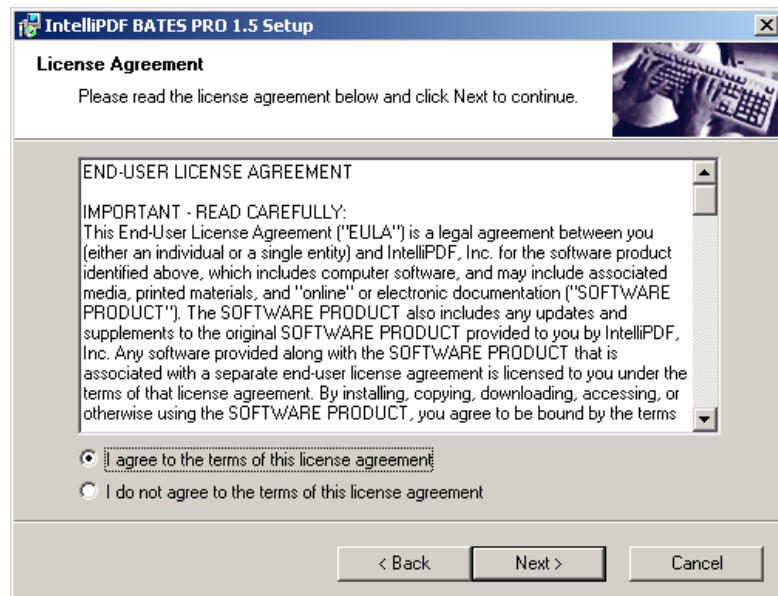
Features	STD	PRO
Maximum Number of Stamps per one page	16	32
Maximum Number of the Stamp Elements	8	8
Maximum Number of Characters per Element	32	32
Stamp's Numeric Element	✓	✓
Stamp's Alphabetical Element	✓	✓
Stamp's Numeric-Alphabetical Element	✓	✓
Stamp's Alphabetical-Numeric Element	✓	✓
Stamp's Static Text Element	✓	✓
Stamp's Roman Numeral Element	✗	✓
Stamp's Date Element (Months and Weekdays)	✗	✓
Upper/Lower cases for Alphabetical Elements	✗	✓
Predefined Variables and Constants (time, author, file name etc.)	✗	✓
UNDOES previous stamps	✗	✓
Custom positioning of the stamp	✓	✓
Rotating Stamps	✓	✓
Stamp's color palettes and opacity	✓	✓
Custom increments of the Elements	✓	✓
Frequency of Element increments	✓	✓
Starting value for the Elements (start with B, start with 24 etc.)	✓	✓
Bates Stamp Preview	✓	✓
Stamp Background Color	✓	✓
Custom sizing of the Elements	✓	✓
Custom fonts (including Barcodes) and Font Embedding	✓	✓
Generates and stamps copies of a source file	✓	✓
Saves and Loads defined presets	✓	✓
Defines default folder for presets	✗	✓
Batch mode to stamp multiple files	✗	✓
Continuous numbering for batch mode	✗	✓
Creates Log Files of Batch Processes	✗	✓
"Output Only Stamped Objects" option for existing hard copies	✗	✓
Creates Bookmarks for stamped pages	✗	✓
Scales Page content to prevent stamps from overwriting the content	✗	✓
Supports RGB, CMYK, GrayScale and SPOT Color Spaces	✓	✓

1.6 INSTALLATION

Uninstall **IntelliPDF BATES DEMO** if installed. Close all running applications. Double-click the installation file.

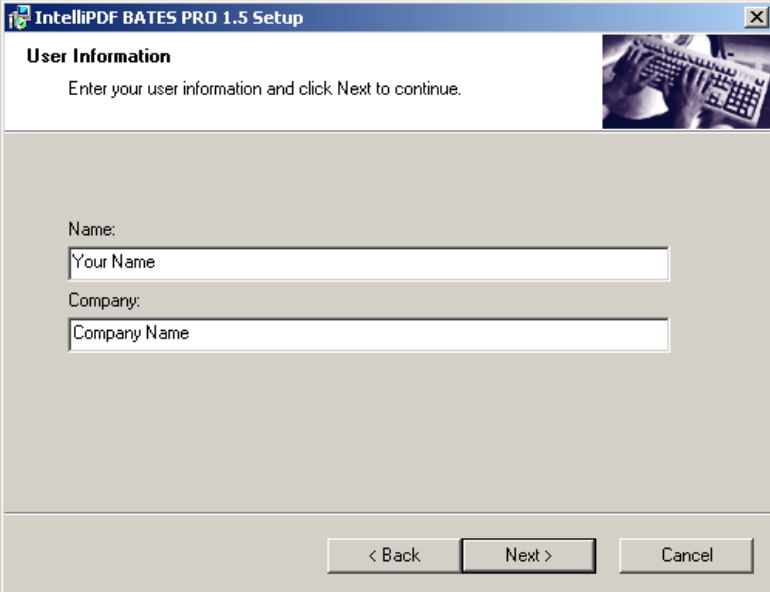


Click **Next**.



Please read carefully the **END-USER LICENSE AGREEMENT** and click **Next** to continue installation.

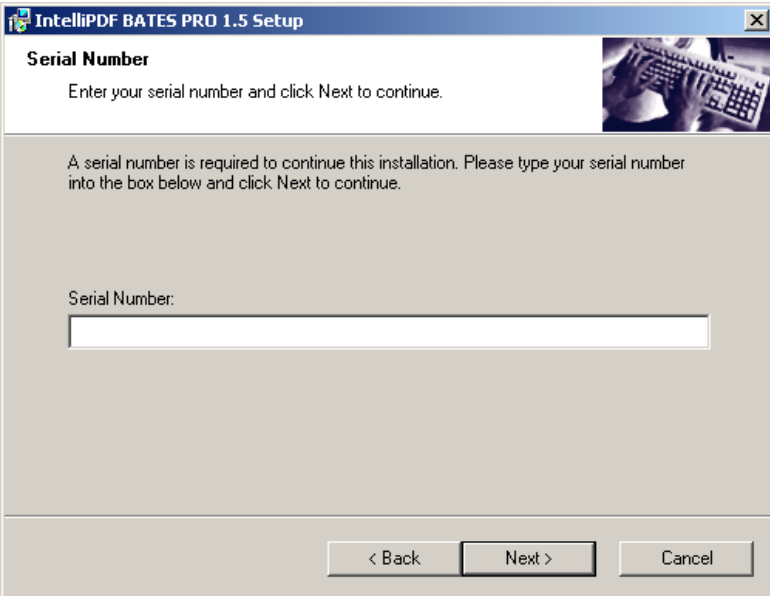
Fill out the Name field (required). Company field is optional.



The screenshot shows a Windows-style dialog box titled "IntelliPDF BATES PRO 1.5 Setup". The window has a blue title bar with a close button (X) in the top right corner. The main content area is titled "User Information" and contains the instruction "Enter your user information and click Next to continue." To the right of this text is a small icon of hands typing on a keyboard. Below the instruction are two text input fields: the first is labeled "Name:" and contains the placeholder text "Your Name"; the second is labeled "Company:" and contains the placeholder text "Company Name". At the bottom of the dialog box are three buttons: "< Back", "Next >", and "Cancel".

Click **Next**.

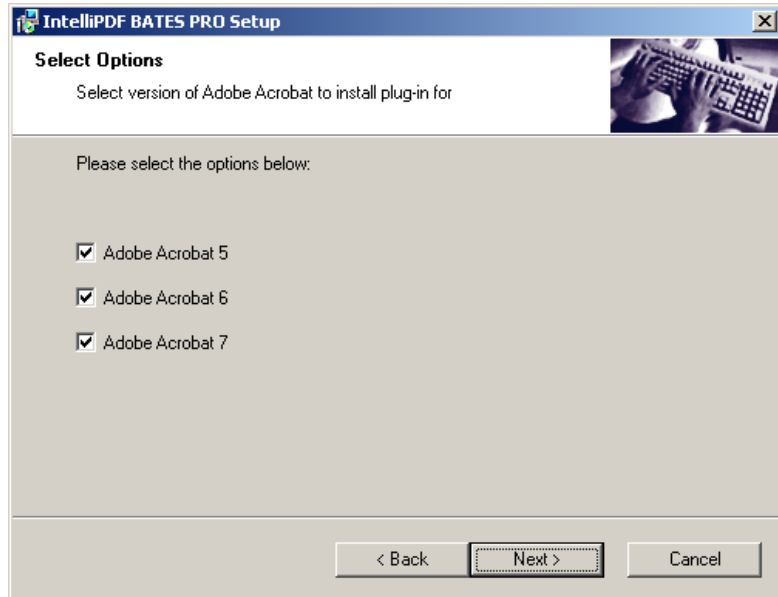
Enter your Serial Number for Full version only. Please be careful: you have only two tries. On a third try an error message will appear, and the installation wizard will be closed. You will need to restart the Installation .



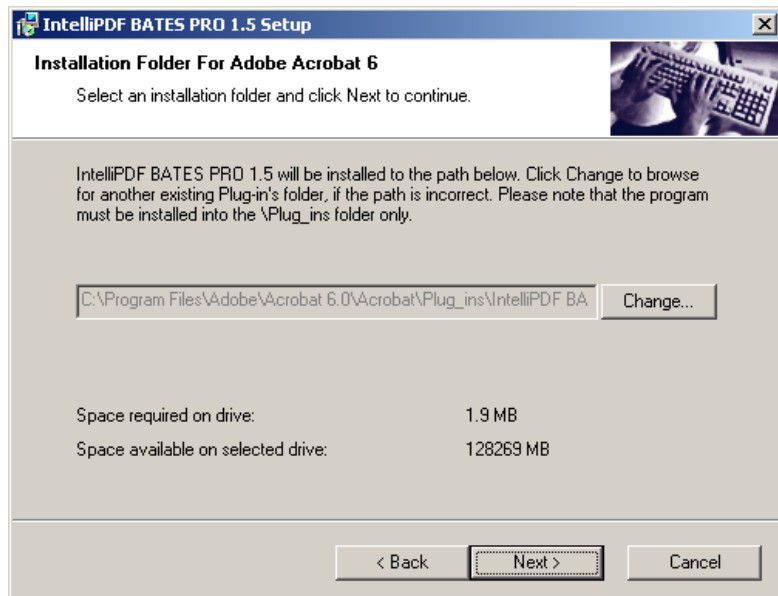
The screenshot shows a Windows-style dialog box titled "IntelliPDF BATES PRO 1.5 Setup". The window has a blue title bar with a close button (X) in the top right corner. The main content area is titled "Serial Number" and contains the instruction "Enter your serial number and click Next to continue." To the right of this text is a small icon of hands typing on a keyboard. Below the instruction is a paragraph of text: "A serial number is required to continue this installation. Please type your serial number into the box below and click Next to continue." Below this text is a single text input field labeled "Serial Number:". At the bottom of the dialog box are three buttons: "< Back", "Next >", and "Cancel".

Click **Next**.

The auto detection of the Adobe Acrobat will generate the screen below. You may install the plug-in in all available Acrobat versions. Installer will automatically try to find the required Plug-ins Folder.

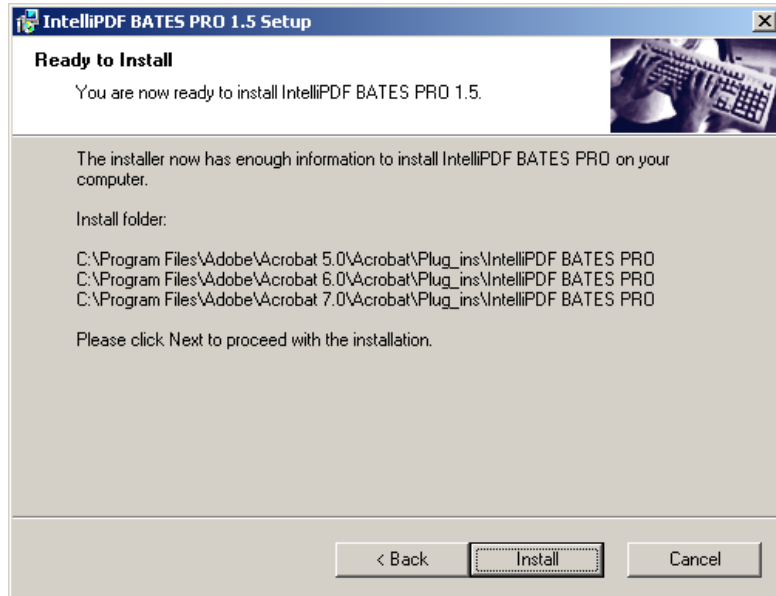


The **Change...** option should be used for manual selection of the Plug-Ins folder. The folder path dialog window is generated once for each selected version of Acrobat.



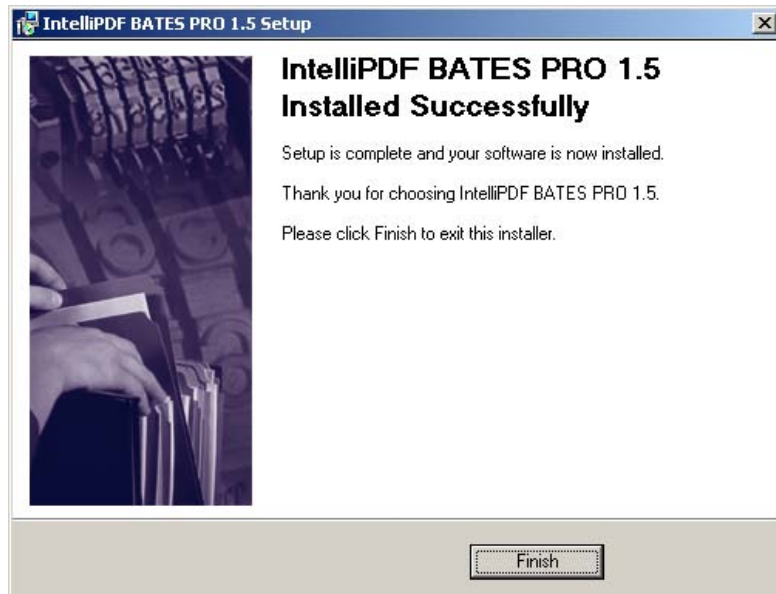
Press **Next**.

Now the program is ready to Install.



To continue, click **Install**.

The installation is complete.



Click **Finish**.

You are ready to start using **IntelliPDF BATES** Plug-in.

1.7 UNINSTALL

There are two ways to uninstall **IntelliPDF BATES**:

1 Click on

Start Button ->

Programs ->

IntelliPDF ->

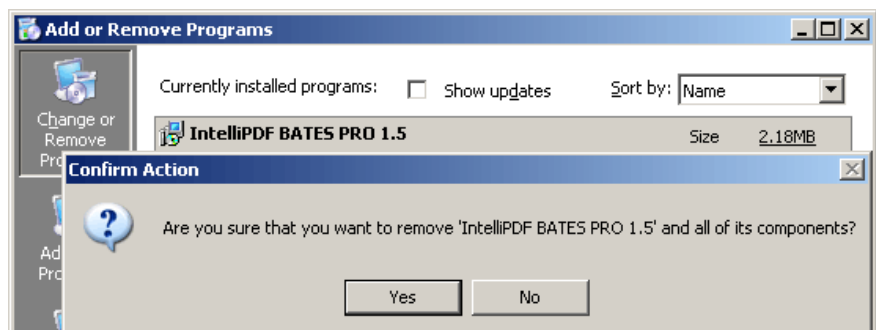
BATES ->

Uninstall IntelliPDF BATES;



Or,

2 Go to **Control Panel**, double-click on **Add/Remove Programs** icon. Find and select "**IntelliPDF BATES**" from the given list. Click **Change/Remove**.





Follow the instructions.

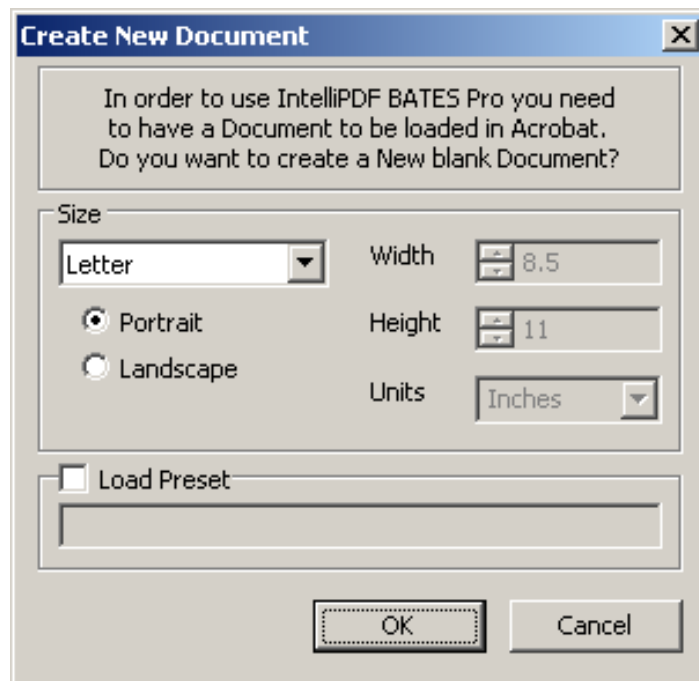
2. WORKING WITH PLUG-IN

2.1 LAUNCHING PLUG-IN

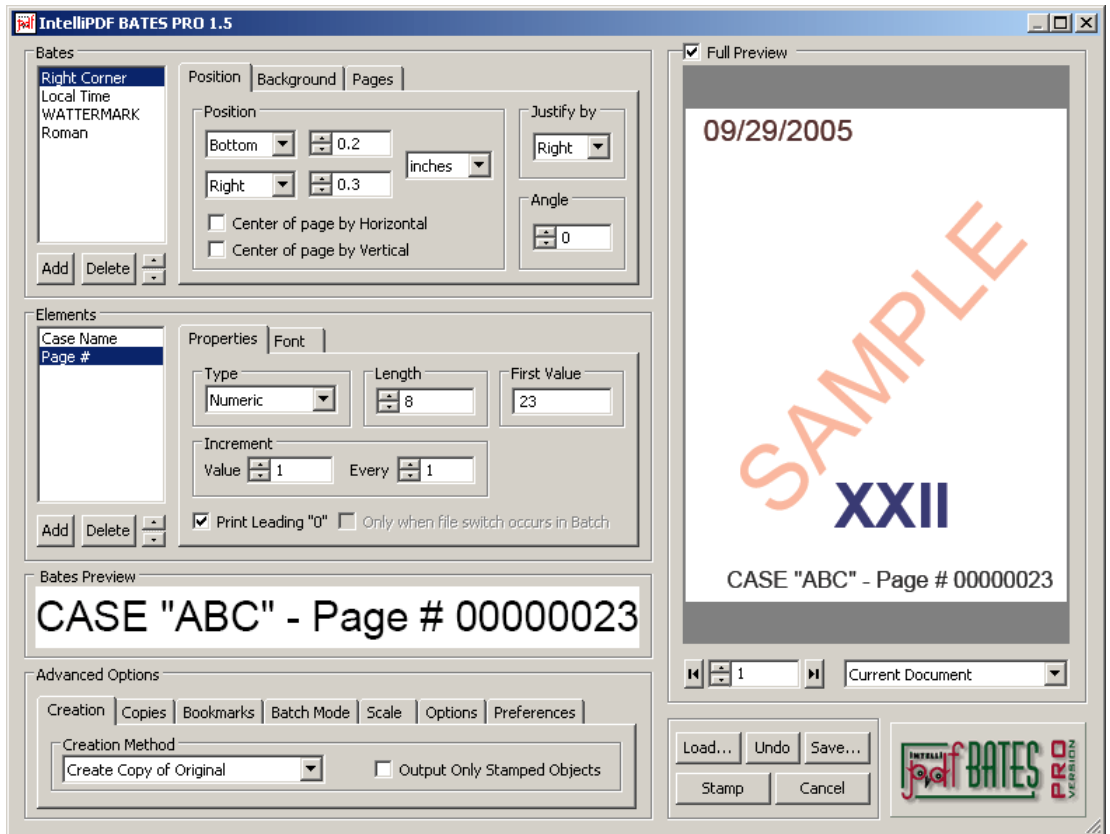
There are two ways to launch the Plug-in:

- 1 Go to the *Plug-ins* menu and select **IntelliPDF BATES (or PRO)**;
- 2 Click on the **IntelliPDF BATES** icon  or  on the Toolbar.

If there's no document opened in Acrobat, you will see a pictured below dialog box. It allows you to define paper size and orientation of a new document. Load Preset feature allows you to load a predefined template right after the new document is created.



If you have any documents opened in Acrobat prior to launching the plug-in, a following dialog pops up:



Note:

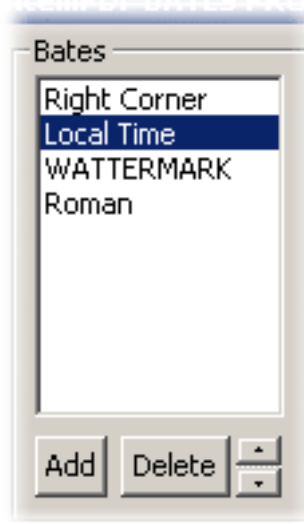


Note: By default the plug-in creates one Bates Stamp with one Numeric Element. It's under user control as any other custom created Bates Stamp.

2.2 OPERATIONS WITH BATES STAMPS

The Plug-in can simultaneously create and implement up to 16 (32 for PRO version) Bates Stamps on each page. Each Bates Stamp consists of independent Elements. A maximum number of 8 Elements is allowed per each Bates Stamp.

2.2.1 Creating / Modifying Bates Stamps

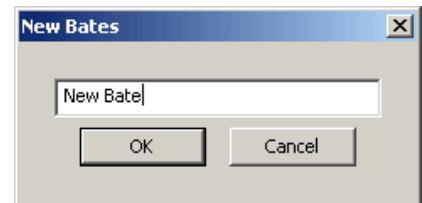


To create a new Bates Stamp, click the **Add** button under the Bates List window. (There's one Bates called "Bates1" created by default).

A "New Bates" dialog box will appear; enter the name (up to 63 characters) for your Bates Stamp. It will appear in the Bates List window.

To delete the Bates Stamp, select it from the List and Click **Delete**.

To change the Name of the Bates Stamp, double-click on it and type a new name into the dialog.

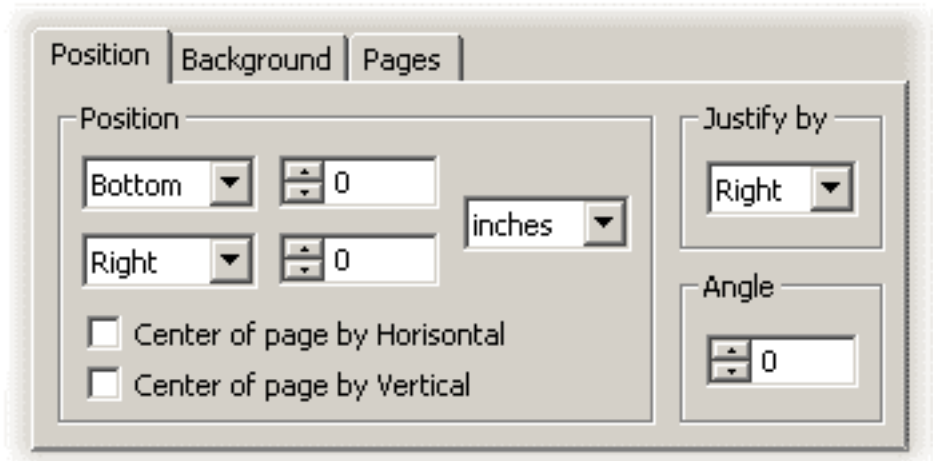


Note:



You can also create a copy of an existing Bates Stamp by clicking on **Add** button while holding the < Ctrl > key. A new Bates Stamp name will consist of the name of the copied Bates Stamp with "(1)" appended at the end.

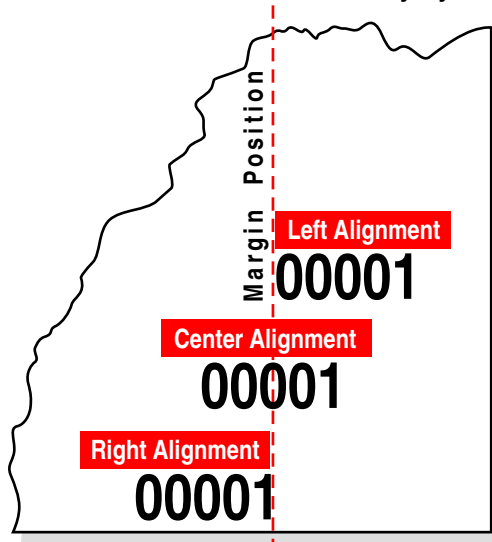
2.2.2 Positioning, Alignment and Rotation



You can position Bates Stamp anywhere on the page. To set the **Top/Bottom** and **Left/Right** margins of the page, enter a value or click the increment/decrement arrows. By clicking the increment/decrement arrows, you change the margin by 0.1 unit of a measure. You can increment/decrement in Points, Picas, Inches, Centimeters and Millimeters.

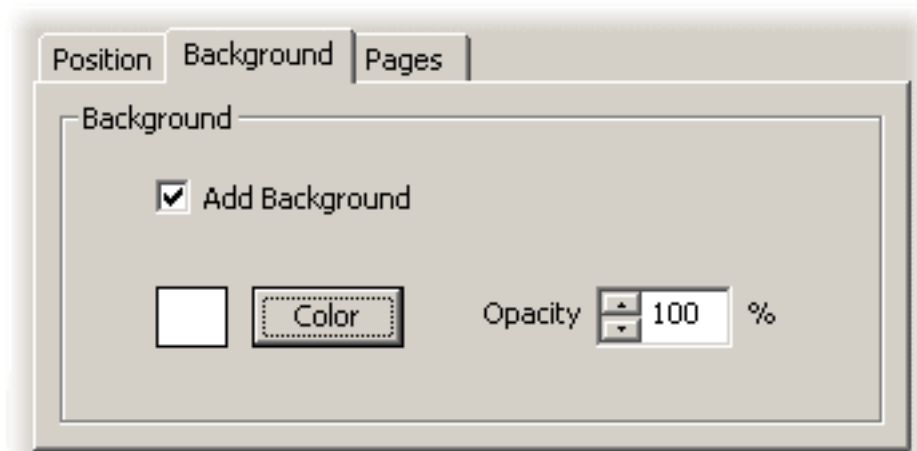
Horizontal and **Vertical** check boxes are used for automatic centering of the Bates Stamp on the page regardless of the page size. (You can center variously sized pages in the same document).

Be aware that **Justify by** controls (Left, Right and Center) position the stamp with regard to the set Margin. Be careful with selecting a right combination of the **Justify by** controls and the Margin values to get the expected position of the Stamp. Use this picture as your reference for understanding of **Justify by** and Margin interrelationships.



The **Angle** field feature allows you to set a rotation angle of the Bates Stamp.

2.2.3 Set Background

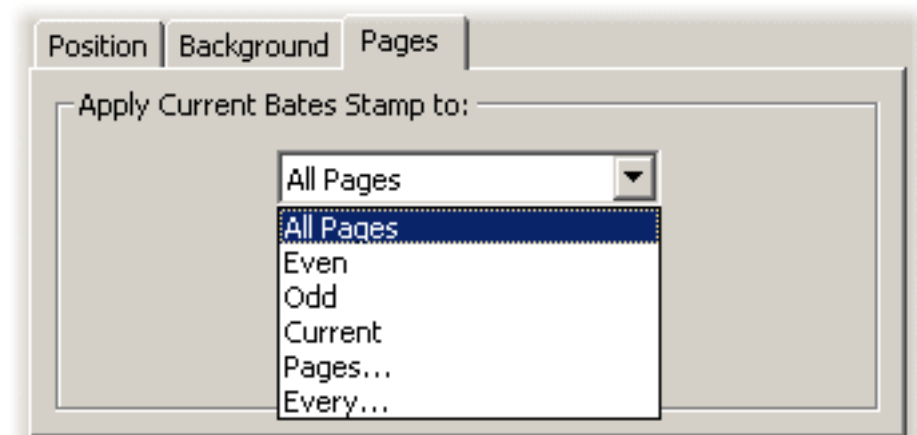


Color feature allows you to select a desired color for the Bates Stamp background. **Opacity** setting allows you to change the opacity of the Bates Stamp background.

Note: For more details about Colors please refer to the Chapter 2.8.



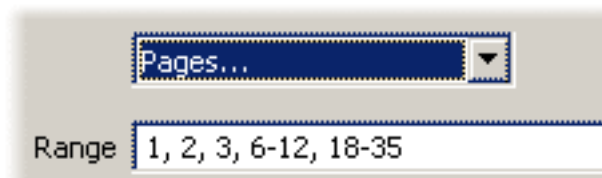
2.2.4 Pages



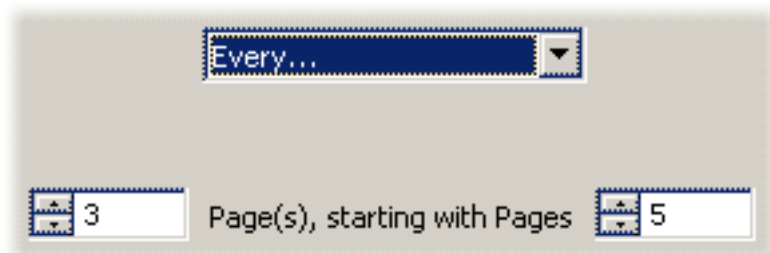
Pages parameter allows you to select the desired Stamping Page Interval. This means that the stamp will appear only on selected pages:

Selection:	Affects:
All	<i>All pages</i>
Odd	<i>Only odd pages</i>
Even	<i>Only even pages</i>
Current	<i>The only page that is current in the Full Preview Window</i>
Pages...	<i>Selected page range</i>
Every...	<i>Only pages in selected sequence</i>

Selected **Pages...** can be separated by comma or dash signs (example: 1, 2, 3, 6-12, 18-35 will stamp pages 1-3, 6-12 and 18-35). The remaining pages of the documents will be intact .



The **Every/Starting With Page** defines the starting point of the stamping process and the stamping intervals. For Example, if **Every** is set to “3” and **Starting with Page** is set to “5” then the stamping process will affect the following pages: 5, 8, 11, 14 etc.



2.3 OPERATIONS WITH ELEMENTS

Stamp Elements are independent from each other and can have up to 32 alphabetic and numerical characters (except **Static Text** Element which can have up to 256 characters for Standard and 1024 characters for PRO version and **Roman** numeral which is constrained by its own format.) To be used in the stamping process, a stamp must contain at least one Element.

The screenshot shows the 'Properties' dialog box with the 'Font' tab selected. The settings are as follows:

- Type:** Numeric (dropdown menu)
- Length:** 8 (spin box)
- First Value:** 0 (text box)
- Increment:** Value: 1 (spin box), Every: 1 (spin box)
- Print Leading "0"

2.3.1 Creating / Modifying Elements


Creation and modification of the Elements is similar to creation and modification of the Bates Stamps. Please refer to the section 2.2.1 for details.

2.3.2 Types of Elements

The screenshot shows the 'Type' dropdown menu with the following options:

- Numeric (selected)
- Alphabetical
- Numeric-Alpha
- Alpha-Numeric
- Static Text
- Roman
- Date

There are six types of Elements:

Note:  Upper and lower case option is available when applicable.


1. Numeric - numeric counter (0, 1, 2, 3, 4,...,9, 10, 11, etc.).

2. Alphabetical - alphabetical counter (A, B, C, D, X, Y, Z, AA, AB, AC, etc.)

3. Numeric-Alpha - mixes **Numeric** and **Alphabetical** counters to follow the pattern below: 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, A, B, .., Y, Z, 10, 11, 12, ... ,19, 1A, 1B, 1C, etc.

4. Alpha-Numeric - mixes **Alphabetical** and **Numeric** counters to follow the pattern below: A, B, C, D, E, ..., X, Y, Z, 0, 1, 2, 3, ..., 8, 9, AA, AB, AC, ..., AZ, A0, A1, A2, etc.

5. Static Text - user defined (up to 1024 characters) or pre-defined (selected from the given list) constant. Examples of pre-defined constants: Document Name, Author's Name, File Path etc. The list also contains variables such as Date, Time, Local Time etc.

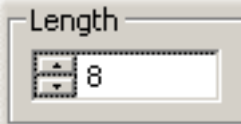
Note:  "Local Time", "Hours", "Minutes" and "Seconds" variables and their combinations will increment in accordance with the system time.

6. Roman - Roman numeral counter. Generates a sequence of roman numerals: i, ii, iii, iv, etc. Available in PRO version only.


Note:  The range of the Roman Element is between 1 and 3999.

7. Date - Months and Weekdays. Available in PRO version only.

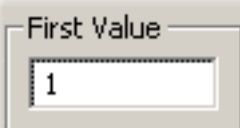
2.3.3 Element's Length



You can set **Length** parameter (1 to 32) for **Numeric**, **Alphabetical**, **Numeric-Alpha** and **Alpha-Numeric** Elements. There is no **Length** parameter for **Static Text** and **Roman** Elements.

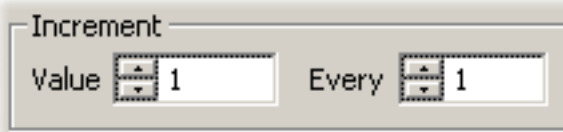
Note:  For an example, the maximum value for Numeric Element with Length of 2 will be "99". For Alphabetical Element - "ZZ".

2.3.4 First Value



First Value defines the starting value for the Element.

2.3.5 Increment Value / Increment Every...



Increment Value property sets how much the element increments on

each occurrence of the Element. This value may vary from -1000000 up to +1000000 in whole numbers. If you set **Increment Value** to "0" you would not be able to increment the element.

If the positive **Increment Value** is used, then when the Element counter reaches its maximum value (controlled by the **Length** parameter), the counter will be reset to the minimum value allowed by its length. If the negative **Increment Value** is used, then it works in reverse: counter reaches its minimum value and resets to the maximum value.

Note: *"For example, a Numeric Element with Length set to 2 and Increment Value set to 1 will reach 99 and reset to 00."*

The **Increment Every...** property defines when the increment of the Element counter should occur. For example, if the Increment Every... is set to 3, the Element's increment will occur every 3 pages.

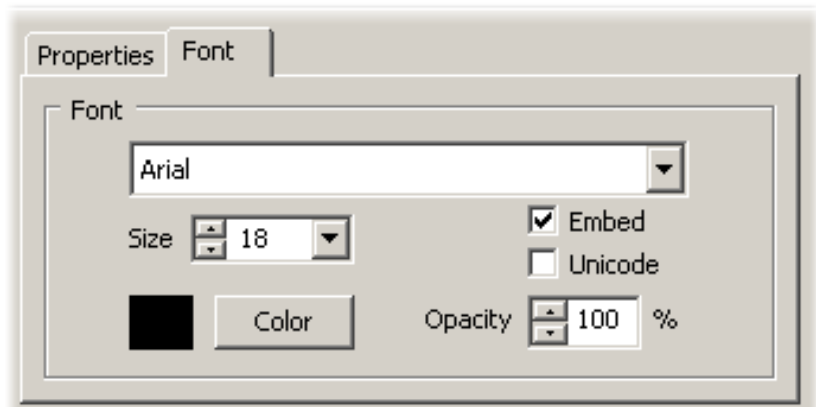
2.3.6 Leading Zeroes

Print Leading "0"

Print Leading "0" parameter is available for **Numeric**, **Alphabetical**, **Numeric-Alpha** and **Alpha-Numeric** Elements. If checked, an element will print with leading zeroes. If unchecked, leading zeros will be omitted.

2.3.7 Font Attributes

Element's default font can be set to any font installed in your operating system (except some symbol fonts). Fonts can also be embedded into a document by selecting the **Embed** checkbox. This feature becomes handy when the file is shared with users that don't have the fonts used in the file.



Choose Unicode option if you need to use non-Western characters (such as Greek, Cyrillic etc). Please note that Unicode option embeds fonts in PDF files.

Note:



*In order to Preview your Bates Stamp properly, you should either enable Use Local Fonts option under the View Acrobat's Menu or enable **Embed** option.*

The font's size is set by the **Size** field: use the drop-down or type in the desired size.

The **Color** control sets the color of an Element. The default color is Black.

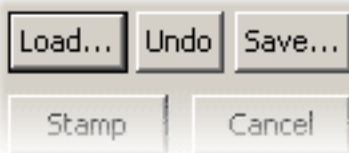
Note:



For more details about the Color control please refer to the Chapter 2.8.

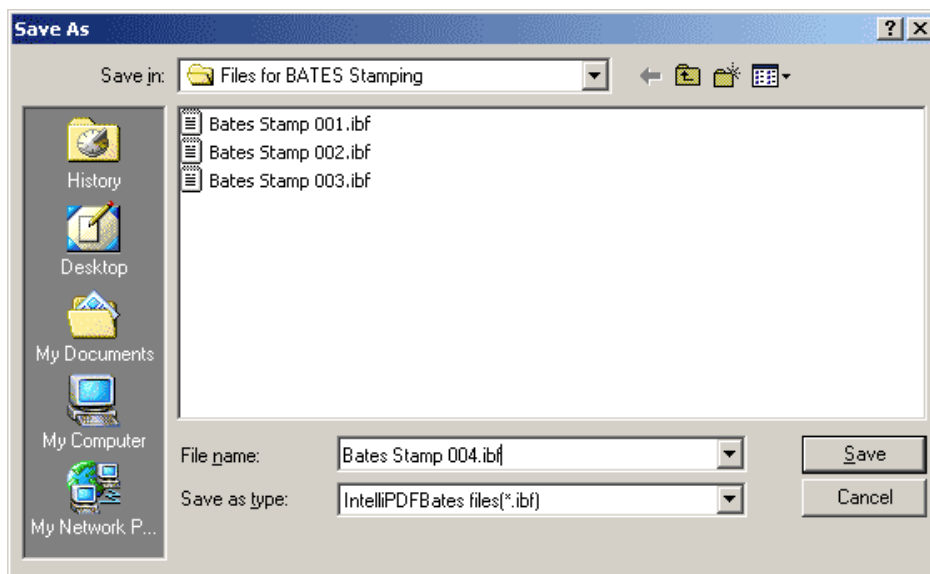
Opacity controls the opacity of the Element's color and has a range of 1 to 100. This allows the user to create custom WATERMARKS and other stamping annotations.

2.4 SAVING AND LOADING STAMP PROFILES



Stamp Profile (Preset) is a collection of stamp's characteristics. After you've created a stamp, you might need it for your future projects. IntelliPDF BATES allows you

to save and re-use Stamp Profiles (Presets.) To store a current Preset, click on the **Save** button. The following dialog will appear:



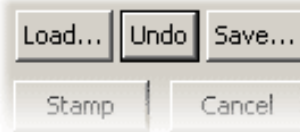
Choose a location and type in a name for your Preset and click **Save**.

To reuse a preset: click on the **Load** button, choose a preset and click on the **Open** button.



Note: To setup a default location for the Presets folder please refer to the Chapter 2.7.7 - Preferences.

2.5 UNDO (Available in PRO version only)



Undo button allows you to erase all previously created stamps from the document. Available in Batch Mode.

Note:

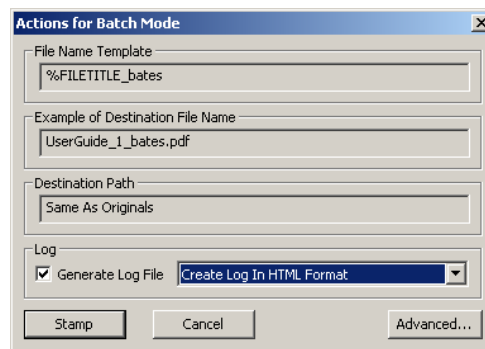


Undo feature will work only with stamps created by IntelliPDF BATES PRO v1.1 and later.

2.6 STAMPING



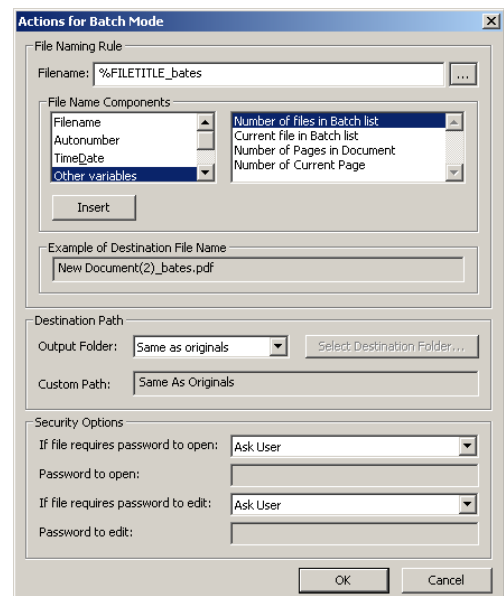
After you finished setting up your stamps, press STAMP to start a stamping process. If you stamping in Batch Mode (available in PRO version only), the following dialog appears:



You have a wide variety of choices for naming files in Batch Mode. If Creation Method of the Creation tab is set to Create Copy of Original and Use Batch Mode is checked, our tool will generate copies of the files from the file list and give them the names according to your setting.

After stamping in Batch Mode the Log file will be created and you can check the result of the stamping process. You can define a file format for log files. Your choices are: TXT (tab delimited file) or HTML.

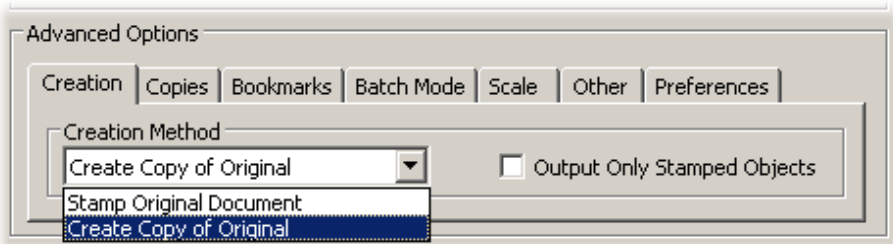
Advanced options allows you to build custom output file names by adding prefixes, suffixes, variables, and constants, including original file names, auto numbering, page number, date, time and many others.



2.7 ADVANCED OPTIONS

IntelliPDF BATES PRO has additional useful features, each located in its own tab in the **Advanced Options** area.

2.7.1 Creation



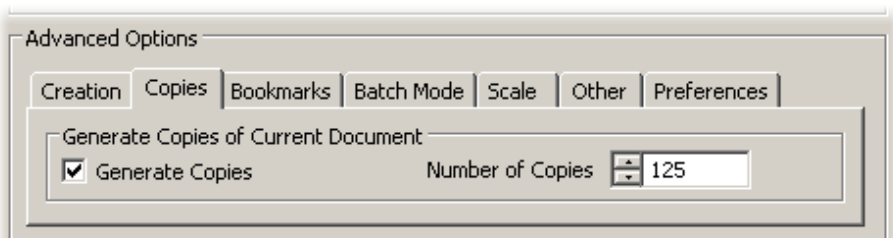
Creation Method: If you choose **Stamp Original Document**, the original document will be stamped. If you choose **Create Copy of Original**, a copy of the original document will be created and stamped. A copy will have the name of the original with "_bates" appended at the end.

Output Only Stamped Object allows you to create a file that stores only stamps without storing the content of the source file.



Note: This option is very useful when you need to put stamps on already existing hard copy documents (invitations, tickets, etc.).

2.7.2 Copies



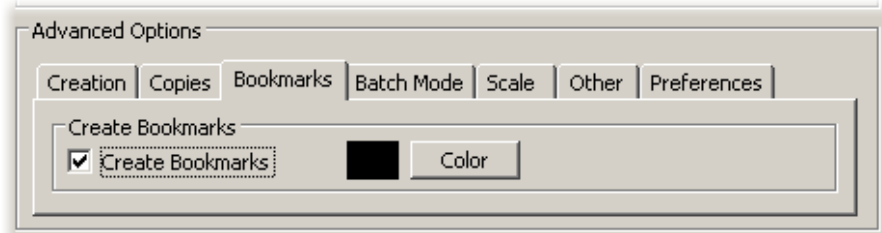
This option allows you to repeat and stamp the pages of the source document as many times as needed.



Note: Example: Let say you have a source document that contains only one (1) page. By setting **Number of Copies** to 1000 you will generate a 1000 stamped copies of the original document.

Generating copies make take a longer time on graphic intensive files.

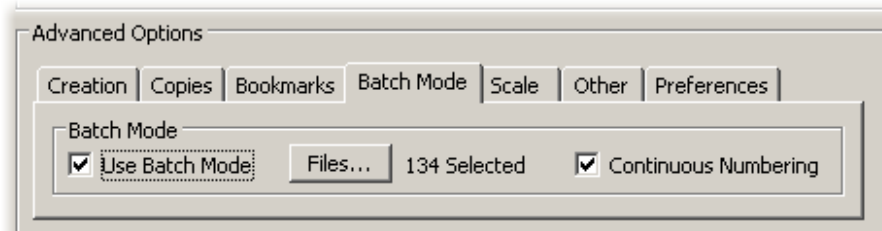
2.7.3 Bookmarks (Available in PRO version only)



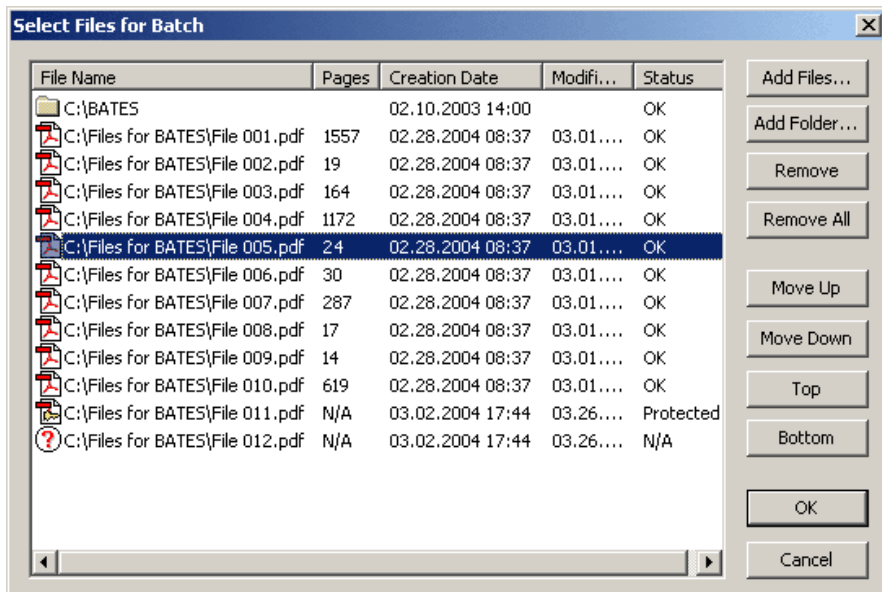
If **Bookmarks** option is checked, the plug-in will generate one bookmark per each Bates Stamp. This helps you to navigate within the stamped pages. Bates Stamp bookmarks will appear under the "BATES" section of the Bookmarks area.

Color button allows you to select a color for the bookmarks.

2.7.4 Batch Mode (Available in PRO version only)





Use this option to stamp multiple files in Batch Mode. Files option allows you to select the files or folders to be processed. Press Files button. The following window will appear:




You can add (**Add Files...**, **Add Folder...**), remove (**Remove** or **Remove All**), sort or change the order of the files to be stamped (**Move Up** or **Move Down**).

Files order is important while using **Continuous Numbering** option. If **Continuous Numbering** is checked, the pages of the files in the list will be treated as one whole document. If **Continuous Numbering** is unchecked, the stamping process will reset at the first page of each file in the list.

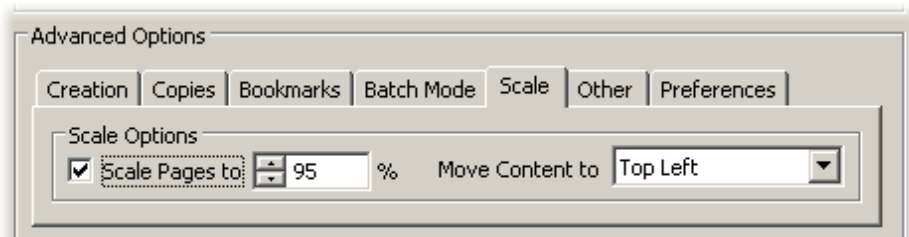
 Icon indicates that the file is ready to be stamped;

 Icon indicates that the file has security settings applied to it; the file might require a password to process it;

 Icon indicates that the file is missing or improperly formatted.

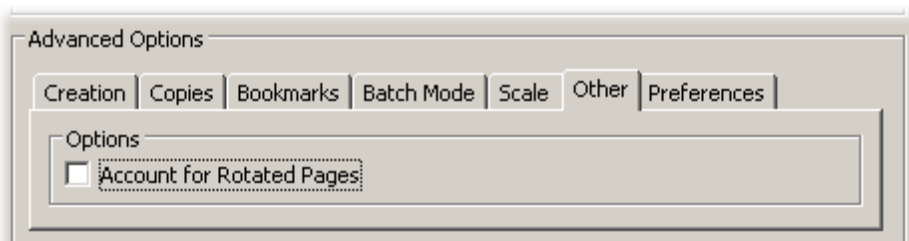
Note:  See also Chapter 2.6 "STAMPING" for more details on stamping and file naming in Batch Mode.

2.7.5 Scale (Available in PRO version only)

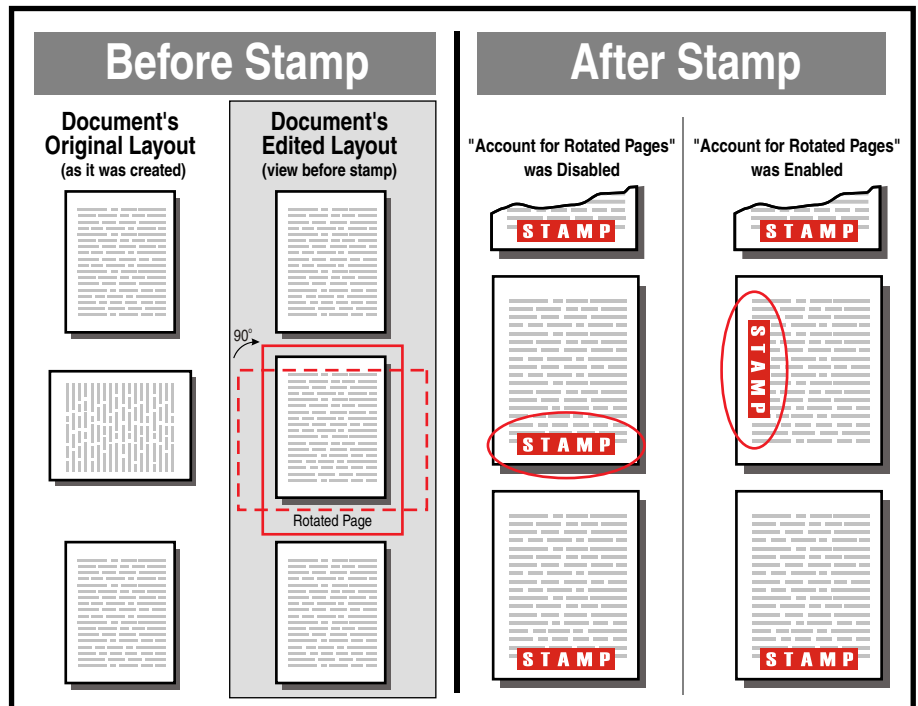


This option allows you to scale a page content while stamping to prevent stamps from overriding the content of the source document. **Move Content to** option adjusts position of the scaled page content.

2.7.6 Other

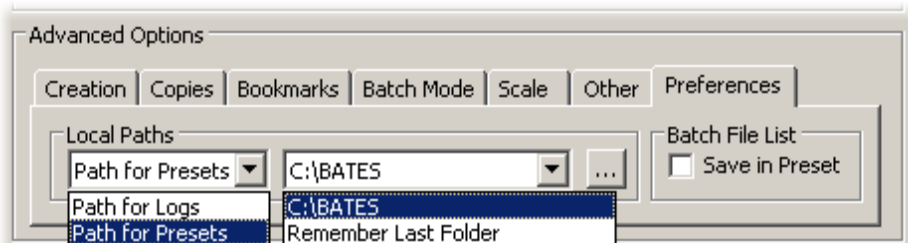


This checkbox allows you to take into account the original orientations of the pages in the stamping process. The following example illustrates the usage of this option.



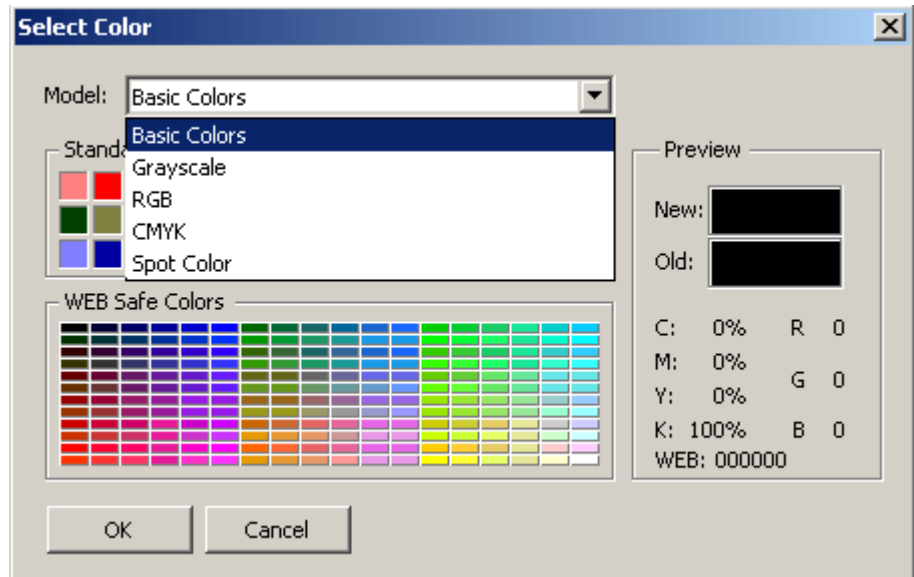
Take a note that page #2 was originally (when document was created) in Landscape mode but then it was changed into Portrait mode before stamping. If **Account for Rotated Pages** is disabled page #2 will be stamped as a portrait page; if **Account for Rotated Pages** is enabled page #2 will be stamped as a landscape page (original orientation.)

2.7.7 Preferences (Available in PRO version only)



Use this option to setup a default path for storing your stamp profiles (presets) and logs of batch processes. It is also possible to save the last folder used for Loading and Saving presets. Batch File List allows you to save a list of files into a Preset.

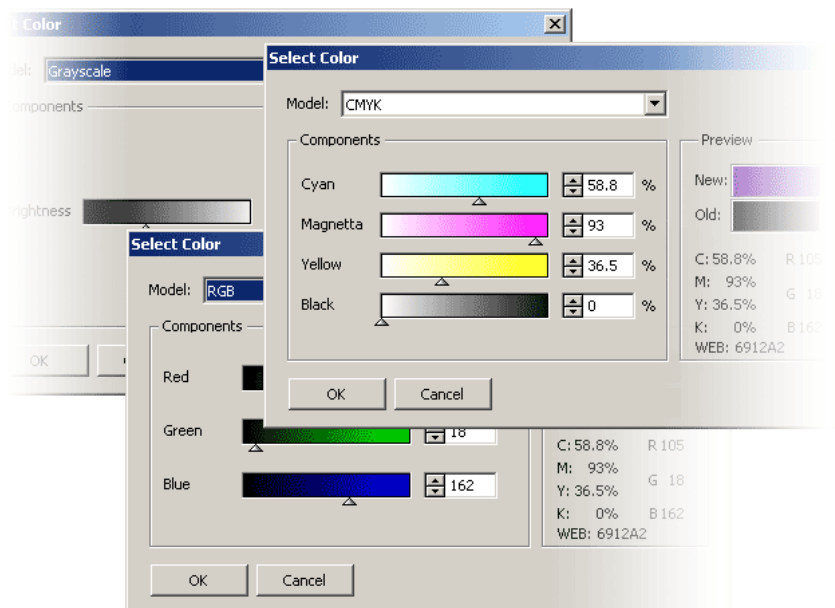
2.8 WORKING WITH COLORS



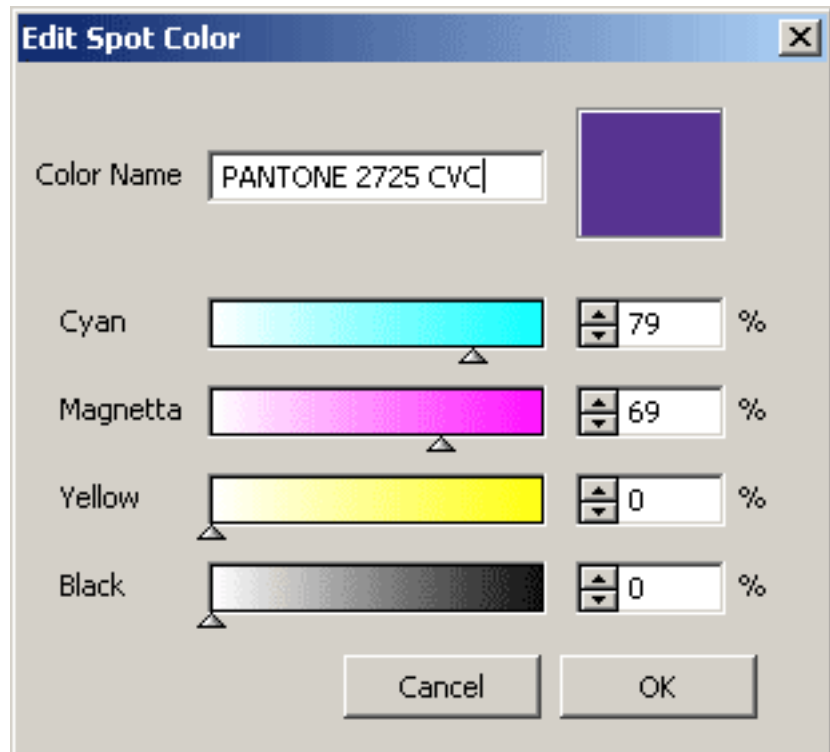
IntelliPDF BATES supports several colors modes: *Basic Colors*, *Grayscale*, *RGB*, *CMYK*, and *SPOT Colors*.

Basic Colors mode will accommodate most of your coloring needs. *WEB Safe Colors* palette provides colors that will not change when you place your *.pdf* documents on the web.

To set a new color in *RGB*, *CMYK* and *Gray* color spaces, simply move sliders to get the desired color.



SPOT colors option allows you to use colors that already exist in the document or to create custom *SPOT* colors. To create a new *SPOT* color, click **New**, set color parameters, input a name and click **OK** to save it.



2.9 BATES PREVIEW WINDOW



Displays a currently selected stamp (highlighted in the Bates list.)

2.10 FULL PREVIEW WINDOW

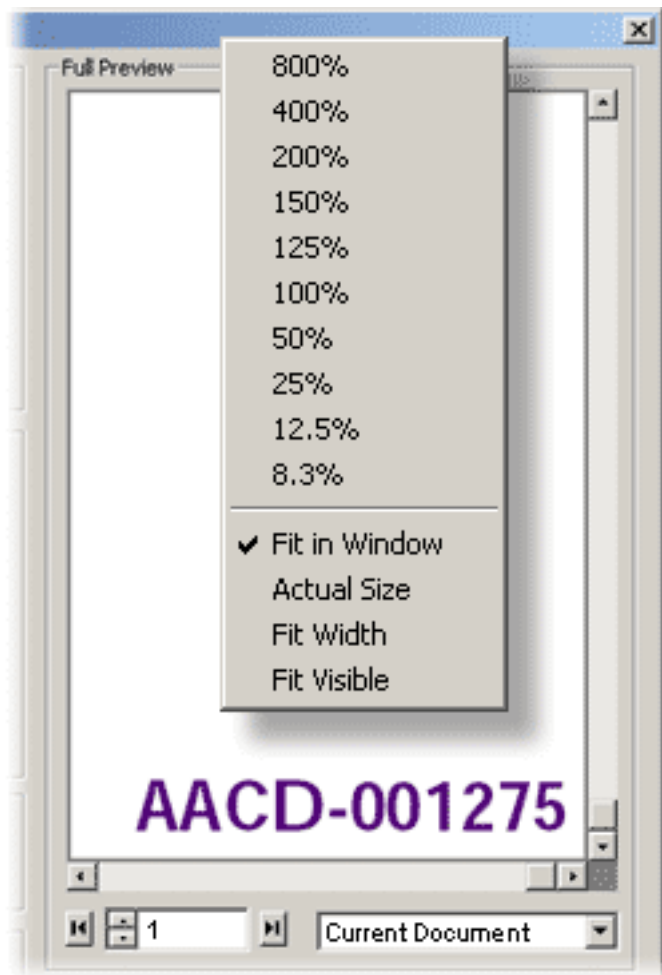
Displays a source document's current page with all applicable Bates Stamps. Allows you to preview stamps before the stamping process. You can zoom into the desired area of the current page by right clicking on it and invoking a series of zooming options (including *Fit to Page*.) These zooming options have following shortcut commands:

< Shift > + Click
"Zooms In"

< Ctrl > + Click
"Zooms Out"

Drag & Move
The "Hand Tool"
pans the page

Right Click
More Zooming Options



When using *Batch Mode* you can select any file from your selection in the preview window to verify the stamps' layout.



IntelliPDF
BATES ^{1.5}
STANDARD & PROFESSIONAL

Plug-in for Adobe® Acrobat®

Mailing Address:

459 N. Croft Ave,
Los Angeles, CA 90048

Telephone:

(877) 468-5733 (toll free)
(323) 969-8096 (from outside of US)

E-mail:

info@intellipdf.com