

This guide describes how to edit PDF documents in Workzone by performing:

- Annotation
- Editing
- Redaction




Limitations:





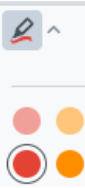





- You can only edit PDF documents if the original file format is PDF. Documents that were not originally in PDF format, for example a Word file with an automatically generated PDF, can only be viewed in the Advanced PDF viewer, but the editing tools will not be available.
- PDF documents that are locked for editing, archived, deleted, attached to a closed case, refiled, or for which you do not have editing rights, cannot be edited using Advanced PDF.










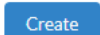
Collaboration:





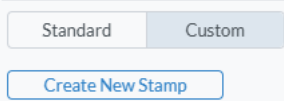



You can share the document with other users via a Workzone link. They can then continue annotating the document and review, edit, or remove your annotations. A PDF document can contain multiple annotations and be annotated by several users, but not at the same time.









When a document is being edited, it is locked in Workzone Explorer to prevent other users from editing it simultaneously. The document lock is reset if the document has been inactive for 15 minutes.







Instruction	Explanation	Navigation
Open case or document list	Open the case or list containing the PDF document you want to edit.	
Open the document preview pane	Select the document you want to edit and click Preview to open the preview pane for the PDF document. The preview pane can be opened either from the Documents tab on a case details page or from a document list.	 
Select Advanced PDF	<p>Select Advanced PDF in the preview pane. You can then start annotating, editing, or redacting, as described below in that order.</p> <p>If you cannot see “Advanced pdf” click Configure preview (settings icon), select Advanced Preview, and click apply.</p> <p>Tip: For easier work, you can choose Full screen in the upper right corner to view the document.</p>	<p>▶ ADVANCED PDF</p> 

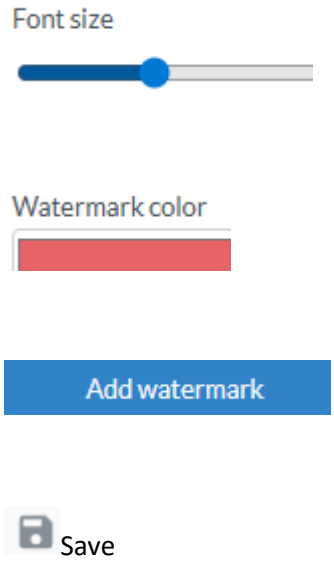
Annotation		
<p>Annotate text</p>	<p>Click Annotate in the navigation bar to display a range of annotation options in a sub-toolbar.</p> <p>You can strikethrough, underline, highlight, or add free text by clicking the relevant button and then selecting the text you want to modify.</p> <p>After selecting the relevant annotation tool, you can choose the colour of the annotation by clicking the arrow.</p> <p>Once you have completed the desired annotation, click Save.</p>	<p>Annotate</p> <p> Strikethrough</p> <p> Underline</p> <p> Highlight</p> <p> Free text</p> <p></p> <p> Save</p>
<p>Add shapes</p>	<p>Click Shapes in the toolbar and then select the shape and colour you want to use in the document. Click and drag the mouse to add the selected shape to the document.</p> <p>Click Save to save your changes or click Cancel to discard all changes.</p>	<p>Shapes</p> <p> Save</p> <p> Cancel</p>
<p>Insert a link to a URL or document page</p>	<p>Click Select in the toolbar and select the text or annotation in the document that you want to use as a hyperlink.</p>	<p> - Select</p> <p> Link</p>

	<p>In the text tool menu, select Link and click URL to enter a web address, or click Page to enter a page reference.</p> <p>Click the Link button to create the link.</p> <p>Click Save to save your changes or click Cancel to discard all changes.</p>	 Save  Cancel
<p>Add text field</p>	<p>Click Insert in the toolbar. A secondary toolbar will then be displayed.</p> <p>Click Text field and place the comment's anchor point in the document. You can then enter the desired text in the text box. The text will appear in the same color as the text box and its pointer.</p> <p>You can select the color of the comment (red, black, blue, or green) using the color selector next to the button.</p> <p>Click Save to save your changes or click Cancel to discard all changes.</p>	  Text field  Save  Cancel
<p>Add signature</p>	<p>Click Insert to display the toolbar containing the signature button.</p> <p>Click Signature, then click the + Add new signature field to open the signature form.</p> <p>Select Draw to draw or handwrite your signature.</p> <p>Select Type to enter your signature using the keyboard.</p> <p>Select Upload to upload an image of your signature.</p> <p>Then click Create to create the signature.</p> <p>The signature will now appear as an option</p>	  Signature  

	<p>in the dropdown menu under Signature. Additional signatures can also be created here.</p> <p>Use the mouse to position the signature on the document page.</p> <p>Click Save to save your changes or click Cancel to discard all changes.</p>	 Save  Cancel
<p>Add stamp</p>	<p>Click Insert to display the toolbar containing the stamp button.</p> <p>Click Rubber Stamp, then click the dropdown menu next to the Approved field (the name of this field changes to reflect the most recently selected stamp).</p> <p>Click Standard to choose from the stamps included in the original installation.</p> <p>Click Custom to choose from stamps you have created yourself. You can create a new stamp by clicking Create New Stamp and then defining the stamp components.</p> <p>Use the mouse to position the selected stamp on the page.</p> <p>Click Save to save your changes or click Cancel to discard all changes.</p>	 Stamp    Save  Cancel
<p>Insert image</p>	<p>Click Insert in the toolbar to display the sub-toolbar.</p> <p>Click Image, then click anywhere on the page to open the file explorer.</p> <p>In the file explorer, select the image you want to add to the page and click Open. The image will be placed at the top of the page and may cover content in the background.</p>	 Image

	<p>You can reposition and resize the image as needed.</p> <p>Click Save to save your changes, or click Cancel to discard all changes</p>	 Save  Cancel
Add attachment	<p>Click Insert in the toolbar to display the sub-toolbar.</p> <p>Click File attachment, then click anywhere on the page to open the file explorer. In the file explorer, select the file you want to attach to the page.</p> <p>Click Save to save your changes or click Cancel to discard all changes.</p>	 File attachment  Save  Cancel
Remove annotation	<p>Click the Select button to activate the selection tool.</p> <p>Then click the annotation you want to delete. A box with the Delete option will appear below the annotation.</p> <p>Click Delete to remove the annotation.</p>	 Select  Delete
Manage comments	<p>Click the Comments button in the upper-right corner to open the comments panel and view existing comments and annotations in the document.</p> <p>In the comments panel, you can search for text within existing comments, apply filters to the list, and sort the full list of comments. You can also reply to another user's comments, edit or delete comments, and change the status of comments.</p>	 Comments

Editing		
<p>Rotate, move or delete pages</p>	<p>Click Panel to open the panel on the left, then click Thumbnails.</p> <p>Click the page in the panel that you want to edit. You will now have the option to Rotate Clockwise or Delete the page. For additional options, click the three dots next to the page.</p> <p>You can rearrange the order of the pages by dragging a page to a different location within the document.</p>	 Panel  Thumbnails 
<p>Export pages</p>	<p>Export existing pages by clicking Menu in the upper-left corner of the toolbar, then selecting Download.</p> <p>Exported pages are downloaded as separate PDF documents, meaning a new PDF document is created during the process. The new PDF document is not automatically added to the WorkZone case and must be added manually.</p>	 Menu
<p>Add a watermark</p>	<p>You can insert your own watermark, which will appear diagonally across the pages of the document.</p> <p>Click Panel in the toolbar to open the panel on the left, then click Watermark to open the Watermarks pane.</p> <p>In the Watermark Text field, enter the desired text.</p>	 Panel  Watermark <p>Watermark text</p> <input data-bbox="991 1883 1406 1939" type="text" value="Watermark text"/>

	<p>Set the transparency and font size by dragging the sliders below to increase or decrease the values.</p> <p>Choose the color of the watermark text by clicking the color field and selecting the desired color.</p> <p>When the watermark has the desired appearance, click Add Watermark, then click Save in the upper-right corner of the toolbar.</p> <p>Note: Existing watermarks, including those added using Advanced PDF Editor, cannot be edited or removed.</p>	
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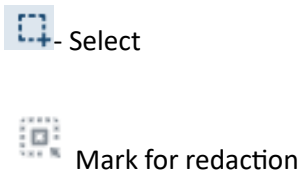
Redaction

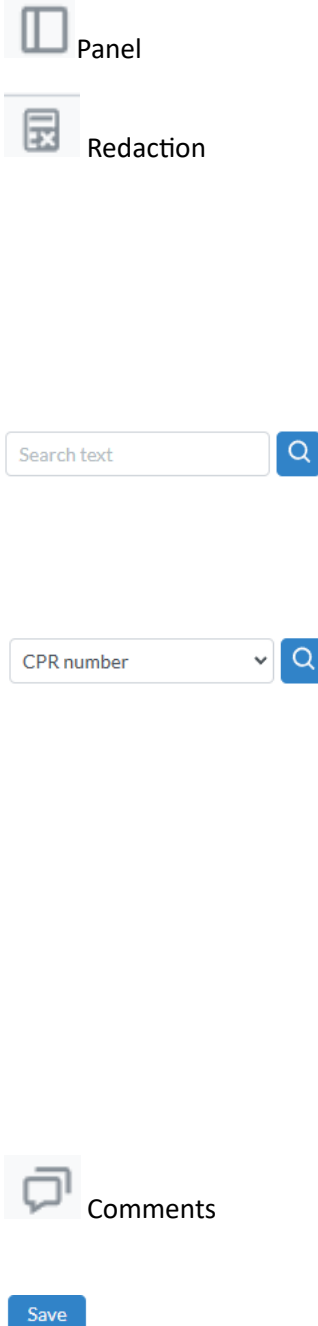
The section below explains how to remove text from a document before it is shared with other parties. Redaction is permanent and cannot be undone. Once the redaction has been completed, the document cannot be restored to its original form.

Collaboration

Before applying the final redaction to a document, you can send it to other users who can continue identifying and marking text for redaction, or review the sections you have already marked for redaction. A PDF document can contain multiple redactions, and several users may work on redacting the same document, although not at the same time. When a document is being edited, it is locked in WorkZone Explorer to prevent other users from making changes simultaneously. The document lock is automatically reset if the document remains inactive for 15 minutes.

Note: The **Suggest Redaction** feature is currently not available in WorkZone.

<p>Manually mark text for redaction</p>	<p>Activate the selection tool by clicking Select in the toolbar at the top of the screen.</p> <p>You can now manually select the text in the PDF document that you want to mark for redaction. Once you have selected a section of text, a toolbar will appear. From this toolbar, choose Mark for redaction.</p>	
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	<p>The text is now marked for redaction but has not yet been permanently redacted.</p>	
<p>Search for text to redact</p>	<p>To search for text and automatically mark the search results for redaction, click Panel in the toolbar. A panel opens on the left side of the screen. In the panel, click Redaction.</p> <p>You can now perform either a free-text search or a predefined search (Email Address, Web Address, Personal Identification Number (CPR), or Company Registration Number (CVR)) within the document.</p> <p><u>Free-text search:</u> Enter the text you want to search for in the search text field and click Search.</p> <p>Predefined search: Select Email Address, Web Address, CPR Number, or CVR Number from the drop-down menu and click Search next to the menu.</p> <p>All text matching the search criteria is automatically marked for redaction in the PDF document. A panel on the right side of the window displays all content currently marked for redaction.</p> <p>At this stage, the redactions have not yet been permanently applied to the PDF document.</p> <p>To add comments to a redaction, click the relevant redaction mark in the document and then select Comment. Enter your comment in the panel on the right side of the screen and click Save.</p>	 <p>The screenshot shows the software interface for redaction. At the top, there are two icons: a 'Panel' icon (a rectangle) and a 'Redaction' icon (a document with an 'X'). Below these are two search fields. The first is a text input field labeled 'Search text' with a magnifying glass icon to its right. The second is a dropdown menu labeled 'CPR number' with a magnifying glass icon to its right. At the bottom of the interface, there is a 'Comments' icon (two speech bubbles) and a blue 'Save' button.</p>
<p>Review redaction markings</p>	<p>You and other users can now review the redaction markings and determine which content should be permanently redacted.</p>	

Text marked for redaction is displayed with a red outline in the PDF document. You can also view a list of all text marked for redaction, whether it was identified through a search or selected manually.

Click **Panel** to open the left-hand panel, and then click **Redaction** to display a list of all types of content currently marked for redaction below the search fields. If you have performed multiple searches, the results for each search are displayed together with the corresponding search terms.

To remove a redaction marking, click the marking in the document and then select **Delete**.


To remove all markings associated with a specific search, click the red x next to that search in the left-hand panel.


To change the appearance of a redaction marking, click the relevant marking in the document and then select **Style**.

To view any comments associated with redaction markings, click the **Comments** icon in the upper-right corner of the toolbar. To add your own comment, click the relevant marking and enter your comment in the panel on the left-hand side of the screen. Then click **Save**.


 Panel

 Redaction

 "select" (5)

 "deadline" (6)

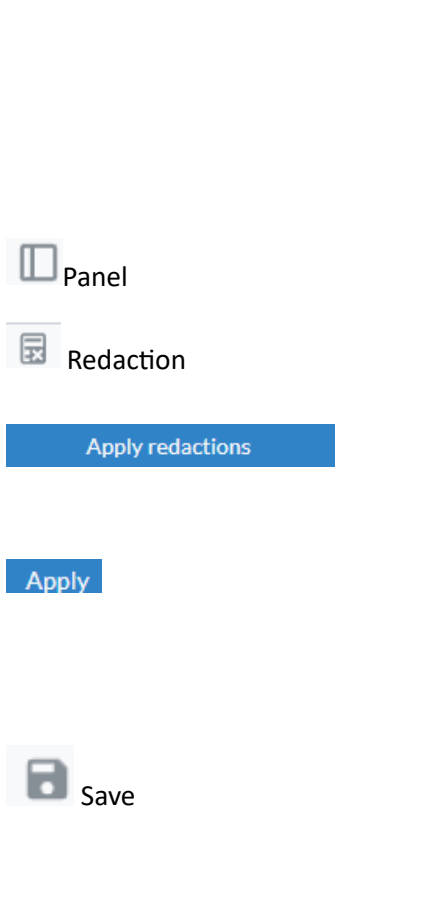
 Delete

 "deadline" (6)

 Style

 Comments

Save

<p>Apply redactions</p>	<p>When the PDF document is ready for redaction, open it in the advanced PDF pane and review the text that has been marked for redaction.</p> <p>Important: Once text has been redacted from a document, the action is permanent and cannot be undone.</p> <p>Click Panel to open the left-hand panel, and then select Redaction. Next, click Apply Redactions to open the confirm dialog box.</p> <p>In the Confirm dialog box, click Apply to permanently redact all text that has been marked for redaction in the document.</p> <p>Click Save in the upper-right corner of the toolbar to save the redactions permanently.</p> <p>Note: Changes to the document are automatically saved after 5 seconds.</p>	 <p>The screenshot shows a vertical toolbar on the right side of the software interface. From top to bottom, the elements are: a 'Panel' button with a square icon, a 'Redaction' button with a document icon and a red 'X', a blue button labeled 'Apply redactions', a blue button labeled 'Apply', and a 'Save' button with a floppy disk icon.</p>
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