



## Save and Reuse Headers and Footers (Adobe Acrobat Pro and Kofax Power PDF Advanced)

It's an interesting point that the Header and Footer dialog boxes in Adobe Acrobat Pro and Kofax Power PDF Advanced are nearly identical. We're not sure who created the layout, but it does make for an easy transition if you move from one solution to another. It also makes it easy for us to provide a tip on Saving and Reusing Headers and Footers for two applications at the same time!

If you have specific header and/or footer information that you routinely add to PDF documents, it makes sense to save them for retrieval later. In Acrobat Pro, these are referred to as "Saved Settings." In Power PDF Advanced, they're called "Schemes." *For reference, see the dialog box images at the end of this tip.*

### To create a Saved Setting or Scheme:

1. Open the **Edit PDF** tools in Acrobat or view the **Edit tab** in Kofax.
2. Click on the **Header & Footer** drop-down in Acrobat or the **Headers & Footers** drop-down in Kofax.
3. Select **Add**.
4. Populate any of the six locations with text and/or field codes.
  - a. If necessary, update the Margin and/or Font settings before inserting text or codes.
  - b. In Acrobat, click on the **Page Number and Date Format...** link to select a pre-existing field format.  
In Kofax, click on the **Macros** drop-down menu to choose a field code.
  - c. Click into the placeholder where you want to insert the code.
  - d. In Acrobat, click on **Insert Page Number** or **Insert Date** and the pre-formatted page number or date code is inserted.  
In Kofax, click on **Insert Macro** and the selected code is inserted.
  - e. Static text and/or multiple fields can be added to any placeholder.
5. Use the Preview area at the bottom of the dialog box to confirm the information has been added to the correct locations.
6. In Acrobat, click on **Save Settings**. In Kofax, click on **Create**.
7. Provide a **Name** for the setting or scheme.

### To use a Saved Setting or Scheme:

1. Launch the Headers & Footers dialog following steps 1-3, above.
2. In Acrobat, click on the **Saved Settings** drop-down menu. In Kofax, click on the **Scheme Name** drop-down.
3. Select the **Name** of the saved setting or scheme.
4. All formatting, field codes and other settings will be inserted into the dialog box.

5. Make any other changes for the current PDF file and click on **OK** to insert the settings on the current file only or **Apply to Multiple** to add the same Header/Footer information to multiple files.

The 'Add Header and Footer' dialog box in Adobe Acrobat Pro features a 'Saved Settings' dropdown set to '[None specified]' with 'Delete' and 'Save Settings...' buttons. The 'Font' section includes 'Name' (Arial), 'Size' (8), and 'Color' (black) options. The 'Margin (Inches)' section has input fields for Top (0.5), Bottom (0.5), Left (1), and Right (1). There are text input fields for Left, Center, and Right Header and Footer text. Below these are buttons for 'Insert Page Number', 'Insert Date', and a link to 'Page Number and Date Format...'. A 'Preview' section shows 'Preview Page 1 of 71' with a 'Page Range Options...' link. The bottom of the dialog has 'Help', 'OK', 'Apply to Multiple Files', and 'Cancel' buttons.

Figure 1 Adobe Acrobat Pro – Add Header and Footer Dialog

The 'Add Header and Footer' dialog box in Kofax Power PDF Advanced includes a 'Schemes' section with a 'Name' dropdown set to '[None]', 'Create...', and 'Delete' buttons. The 'Font' section shows 'Name (K)' (Arial), 'Size' (8), 'Style' (Normal), and 'Color' (black) options, along with an 'Outline Only' checkbox. The 'Margin' section has a 'Unit' dropdown set to 'inches' and input fields for Top (0.50), Bottom (0.50), Left (1.00), and Right (1.00). There are text input fields for Header Left, Center (X), Right, Footer Left, Center (Q), and Right. A 'Macros' section has a '<Select a Macro>' dropdown, 'Settings...', and 'Insert Macro' buttons. A 'Preview' section shows 'Preview Page 1 of 2' with 'Page Range...' and 'Clear All' links. The bottom of the dialog has 'OK', 'Apply to Multiple', and 'Cancel' buttons.

Figure 2 - Kofax Power PDF Advanced - Add Header and Footer Dialog