

# Tips for PDF Document Processing

## Overview

PDF documents are designed to not be as editable as Word documents. Thus, bringing them into WinSearch requires a few more steps. When working with PDF documents, there are two questions that must be addressed first for each PDF document:

- Does the document contain text or pictures?
- How protected is the document?

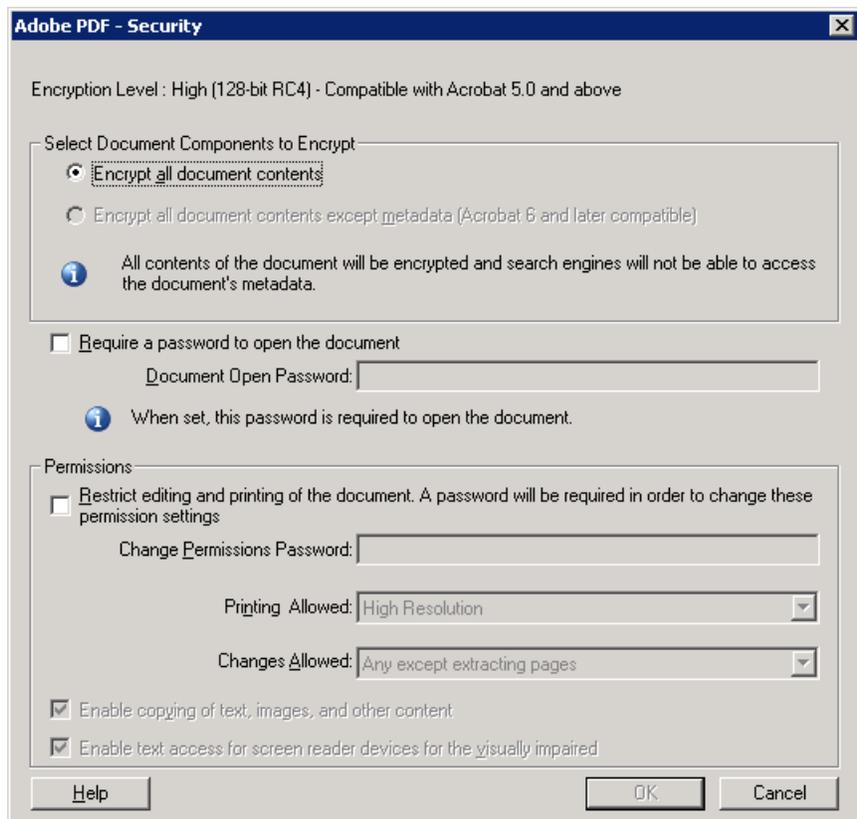
With the first question, it may be that the PDF document contains no text whatsoever but instead contains a picture of the text. It is just as if you photographed those pages with your phone's camera and then put the pictures into a document. Scanners often save scans this way. To process these PDFs as a resume, you need to use OCR software to convert the picture of the text into the letter.

How can you tell if the PDF is a picture or text? Try to select the text. If you can select the text, the PDF document has text. If you select the entire page, it is likely a picture. If you cannot select anything, it is likely protected.

With protection, PDFs can be locked down by the creator. How much is allowed and what is selectable is set when the PDF is created. As an example, the dialog box show

shows one set of options for how much the document is locked down. The specific options for locking down a PDF depend upon which software is used to create the PDF.

Documents that have more protection are harder to do stuff to. With ones that are really locked down, the best solution is asking the candidate to re-send their resume.



## Processing non-Resume PDFs

The simplest PDFs to process are the non-resume documents. Why? You don't need the text to be selectable. These documents don't even have to belong to a candidate. They can be for managers and companies too.

### How to Process a non-Resume PDF in Outlook

- Highlight the email containing the document then click the ADD TO DB RECORD toolbar button (📁) to show a dialog box like the one shown here.
- Enter the person's or company's name and select LOOKUP.
- Highlight them in the list.
- Fix the Document Description entry to match the document's purpose. The final document description will also parenthetically include the document's filename if the check box below the description is checked.
- Clear Add WSResume Record and Process Key Words check boxes.
- Highlight the intended person or company then choose ADD DOCUMENT.

ID	Last Name	First Name	Middle	Addr1
1087	Smith	Anthony		8511 South Dan
794	Smith	Brian	K.	5207 S. Inglesid
937	Smith	Brian	K.	5207 S. Inglesid
312	Smith	Charlie		
1274	Smith	Christop...	B.	27401 Westow.
555	Smith	Chick	P.	27401 Westow.

At this point, the document is added as an imported document.

## Processing a PDF Resume to Just WSResume

You may decide that you do not want to add a Word document but you do want to add the text of the resume to the person. Use this approach when you assume that you will get a more useful resume later in the recruitment process.

The steps are different when the person that the PDF resume belongs to is already in the database.

### To process the unformatted text from a PDF file for a new person:

- Open the PDF document.
- Select the text in the document and copy it to the Clipboard:
  - Press **Ctrl+A**
  - Use the **EDIT → COPY FILE TO CLIPBOARD** command.
  - Drag the mouse to highlight the text then right-click and choose Copy

Note: If this command and the **EDIT → COPY** command are unavailable, the document may be so locked down that you cannot use this approach.

- Switch to WinSearch then click on the New Person From Clipboard toolbar button (📄).  
Note: If you get a message like the one below, you cannot use these steps for this document.



- Make any necessary changes to the person's record.
- Select the **FILE** → **SAVE CHANGES** command or click the Save Changes toolbar button (📄).
- If you want to attach the original PDF to the candidate's record, follow the steps under adding a non-resume PDF document.

The person's initial entries for staff rep, category, and status are the entries used for any new person created from within WinSearch. WinSearch does check for possible duplicates so you may see the standard Potential Duplicate Record Found message.

#### **To process the unformatted text from a PDF file for an existing person:**

- Open the PDF document.
- Select the text in the document and copy it to the Clipboard:
  - Press **Ctrl+A**
  - Use the **EDIT** → **COPY FILE TO CLIPBOARD** command.
  - Drag the mouse to highlight the text then right-click and choose Copy

Note: If this command and the **EDIT** → **COPY** command are unavailable, the document may be so locked down that you cannot use this approach.

- Switch to WinSearch then click the Lookup Any Person toolbar button (🔍).
- Enter the person's name and click OK.
- Choose the **VIEW** → **WSRESUME** command or click the WSResume toolbar button (📄).
- Select the **FILE** → **NEW** command or click the New toolbar button (📄).
- Select the **EDIT** → **COPY** command or right-click the empty area and choose PASTE from the popup menu. If nothing pastes into the document, then the text cannot be copied from the PDF file and you cannot use this approach.
- Select the **PROCESS** → **PROCESS RESUME/DOCUMENT** command or click the Process/Reprocess toolbar button (📄).
- Select the **FILE** | **SAVE TO DATABASE** command or click the Save to DB toolbar button (📄).
- If you want to attach the original PDF to the candidate's record, use the steps for processing a non-resume document to add that PDF to the candidate.

## Processing a PDF Resume via Word

Often, you can try this option as a first step. This approach works best when copying the contents of the PDF document includes the document's formatting.

### To process a PDF resume via Word:

- Open the PDF document.
- Select the text in the document and copy it to the Clipboard:
  - Press **Ctrl+A**
  - Use the **EDIT → COPY FILE TO CLIPBOARD** command.
  - Drag the mouse to highlight the text then right-click and choose Copy
- Open a new Word document then use the **EDIT | PASTE** command to paste the PDF document's contents into the Word document. If you do not like how the PDF's contents appear in Word, then use a different method for importing the resume.
- Click the Process Resume toolbar button (⚡) or the ADD TO DB RECORD toolbar button (📄).
- Select Yes to the prompt to save the file.
- Continue processing the document as you would for other Word resumes.
- If you want to attach the original PDF to the candidate's record, use the steps for processing a non-resume document to add that PDF to the candidate.

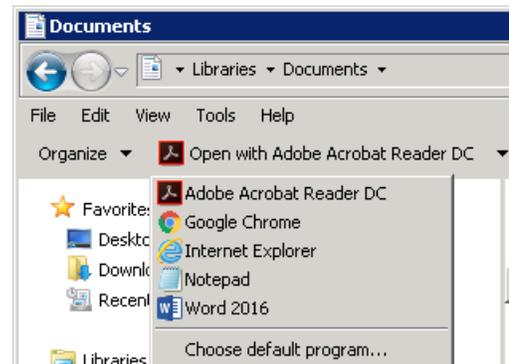
## Using Word 2013 or 2016

These two versions of Word can open PDFs, so you have another method of getting your document to Word.

However, if you open the resume and then process it directly, you will find that the file gets saved in a not quite DOCX and not quite a PDF file so that it can only be opened by that version of Word and not by Adobe. Therefore, you want to copy the document's contents to a new document and process that new document.

### To process a PDF document in Word 2013/2016:

- Open your Documents folder.
- Highlight a PDF file.
- Click the down arrow at the end of Open with ...
- Choose Word 2013/2016.
- Press **Ctrl+A** then **Ctrl+C**
- Switch to a new document
- Press **Ctrl+V**
- Click the Process Resume toolbar button (⚡) or the ADD TO DB RECORD toolbar button (📄).

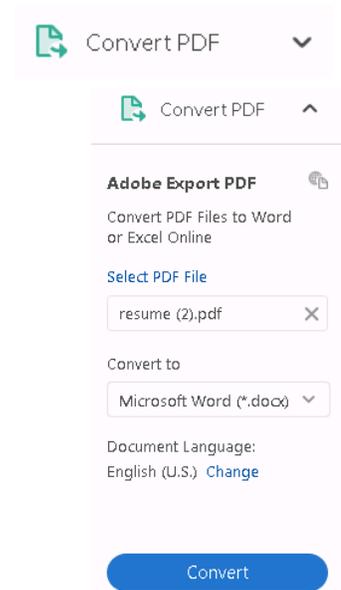
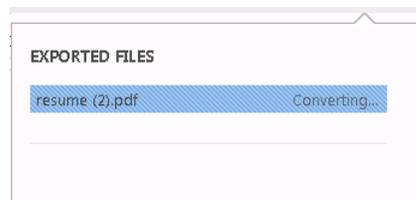


## Using 3<sup>rd</sup> Party Tools to Convert a PDF

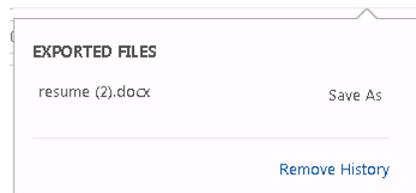
Third party utilities can also convert your PDF documents to Word documents. These third party utilities can be installed software such as Adobe or deskUNPDF or something on-line such as PDFOnline.com.

### To use Adobe Export PDF Tool:

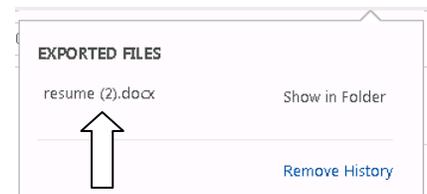
- Open the PDF in Adobe
- Log in to your pre-existing Adobe account that includes the Adobe Export PDF online service, if you have not already done so.
- Expand the Convert PDF tool if needed by clicking the **V** arrow if needed.
- Click the blue Convert button to start the conversion.



- Click Save As once it becomes available.



- Save the PDF to any location that you can find later.
- Select the new DOCX file that you just created to open that folder location to that file.
- Press **Enter** or double-click the file that you just converted and it opens in Word.
- Click the Process Resume toolbar button (⚡) or the ADD TO DB RECORD toolbar button (📄).

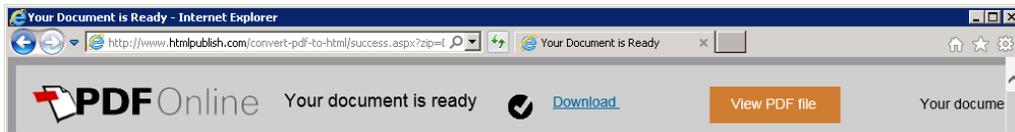


### To Use PDFOnline.com:

- Save the PDF to any location that you can find later.
- Open your browser and go to PDFOnline.com.
- Click Upload a File to Convert.



- Pick the PDF file that you saved and PDFOnline starts the conversion.
- Click Download when done.



- Click Download Word file in the Downloading converted files section.
- Click Open to open the document.

### Downloading converted files...

You may see a short survey, and then your converted document will be ready to download. The survey is optional: we ask that you take a moment to answer at least one question. Or, click Skip survey to go directly to your download.

Please click on the appropriate links to download the required formats. Once you click on the link, the file will be downloaded to the Downloads folder.

- [Download Word file](#)
- [Download PDF file](#)
- [Download HTML file](#)



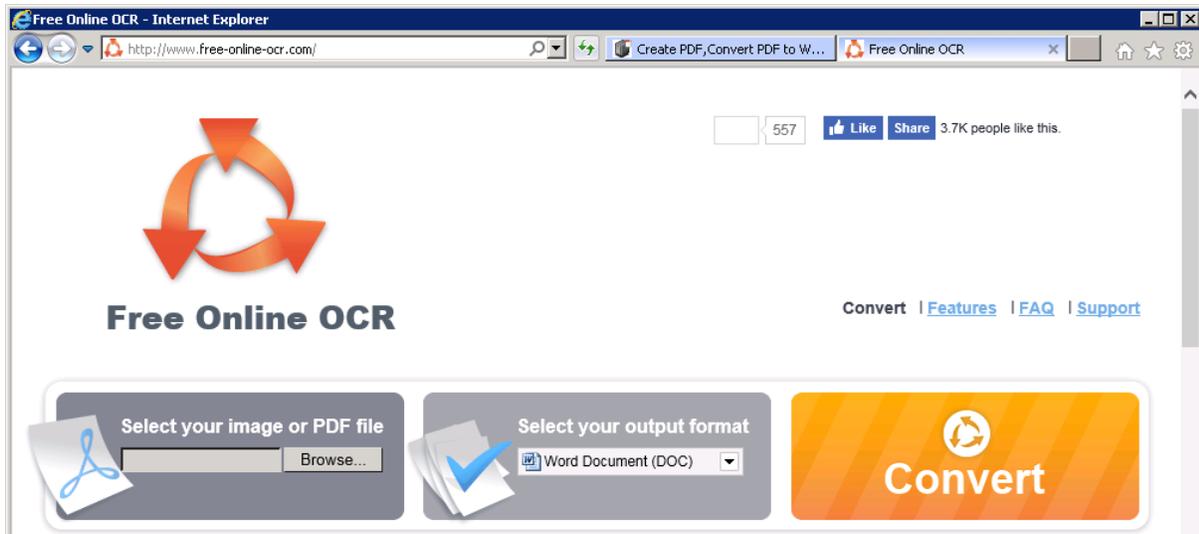
Now, you are ready to process the resume from within Word.

### Using 3<sup>rd</sup> Party Tools to Perform OCR on a PDF

Besides using third party utilities to convert PDF text to Word documents, OCR utilities can convert a picture of text into the text it represents. Some of them combine the OCR abilities with PDF/Word conversion. Here is an example of one that can do both.

#### To Use Free-Online-OCR.com:

- Save the PDF to any location that you can find later.
- Open your browser and go to Free-Online-OCR.com.
- Click Browse under Select your image or PDF File and pick the file you saved.



- Click Convert and Free Online OCR starts the conversion.
- Click Download and Open to open the downloaded file in Word so you are ready to process the resume.