



# Editing Table of Contents (TOC) in PDFOutliner

PDFOutliner provides several techniques to edit the Table of Contents (TOC) in your PDF. This help document covers the following features:

- ◉ **AutoTOC** Let PDFOutliner auto-magically build a TOC for your PDF.
- ◉ **MiniTOC** Provide sample heading text and let PDFOutliner find others.
- ◉ **Push Text** Drag-and-drop text from PDF directly into TOC.
- ◉ **Solo Editing** Click to edit any TOC item, both the title and page number.
- ◉ **Bulk Renaming** Use menu commands for find/replace, and sequential numbering of selected TOC items.
- ◉ **Nudging into Shape** Move TOC items to indent/outdent and craft a TOC hierarchy.
- ◉ **Bullseye Linking** Accurately position TOC links on a page.

Each of the above features is explained in the following sections. Visit [www.onekerato.com](http://www.onekerato.com) to view video tutorials and blog posts explaining how to get the most out of PDFOutliner.

## AutoTOC

AutoTOC is an automated way to generate a TOC for your PDF. PDFOutliner will analyze the range of fonts used in the PDF, and attempt to tease out a hierarchy of headings. This feature is available via the Outline menu > AutoTOC... command.

### ***AutoTOC works great for:***

- PDFs produced by a word processing or page layout application such as Word 2011 for Mac, Pages '09, or InDesign CS6. In such PDFs, the fonts used for headings and body text are clearly distinguishable which enables PDFOutliner to extract the TOC structure by interpreting font information.

### ***When to use AutoTOC:***

- You can create a PDF from many Mac applications using the OS X “Save as PDF...” command. In such cases, the generated PDF does not have a TOC. If the original content uses different fonts for various headings, you can use AutoTOC feature in PDFOutliner to quickly parse the PDF and automatically build a TOC.
- If you have PDF for professional use such as handbooks and reference manuals, you may wish to extract chapters and sections using the OS X Preview application. Typically, you will lose any navigable TOC embedded in the PDF. Use the AutoTOC feature in PDFOutliner to quickly reconstruct the TOC for the extracted pages.

### ***AutoTOC may NOT yield good results for:***

- PDFs with scanned or even OCR content because font information is either missing or inadequate to decipher a structure for the PDF.
- PDFs related to financial reports where font differences may be minimal and font characteristics such as all capitals or small caps are used to visually identify “heading” fonts.

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## MiniTOC

MiniTOC is a pattern-matching feature for generating a list of TOC entries.

The user must first select some text in the PDF, and then invoke the MiniTOC feature via the Outline menu > MiniTOC command. PDFOutliner will interpret the “sequence of fonts” in the user-selected text, and then parse the entire PDF document to build a list of similar text patterns.

MiniTOC does not build a hierarchy of TOC items. The MiniTOC command always results in a list.

### *MiniTOC works great for:*

- When a heading is not a single font but a combination of fonts – for example “Ch 6. Proteins” where the font for “Ch 6” may be larger than the font of the rest of the chapter title. In such situations, select the text including both fonts and run the MiniTOC command to build a list of large font followed by small font patterns in the PDF.

### *When to use MiniTOC:*

- To generate a focused list of items such as Table of Figures or markup such as “Tips/Notes/Warnings” or any such identifiable content in the PDF which uses distinctive font(s).
- To extract a long list of headings which all use the same font, in preparation for using the manual editing commands provided by PDFOutliner to convert a list of TOC items into a structured hierarchy.
- When the PDF has “running headings” with a mix of closely-matched font styles as often found in financial reports.

- When AutoTOC ignores a particular heading style because its frequency is relatively too low or too high. Use MiniTOC to extract all occurrences of that heading into a list.
- When the font information in the PDF has “irregularities” such that parsing the fonts using AutoTOC leads to situations where heading text is split up over 2 or more TOC items. When using MiniTOC, the entire selected text is treated as a single TOC item and a similar pattern (including font irregularities) is searched through the PDF.

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## **Push Text**

The Push Text feature allows you to select any text in the PDF and quickly insert it into the Table of Contents (TOC). This feature is implemented using both the menu and drag-and-drop.

When text is selected in the PDF, two commands under the Outline menu become active: (1) Insert Selection as Sibling; and (2) Insert Selection as Child. These commands will push and insert the selected text into the TOC, relative to the currently selected TOC item, if any.

You can also customize the toolbar to add buttons to trigger the Push Text commands.

Alternatively, you can drag and drop text from the PDF directly into the TOC. Take care to use a single mouse click to select and drag PDF text because a double-click in the PDF triggers the “Bullseye Linking” feature new in PDFOutliner version 1.4, discussed later in this help document.

### ***When to use Push Text:***

- If you are skimming the PDF page-by-page, take a few moments to select interesting text and push it into the TOC to build a highly-customized TOC to suit your needs for quick lookups. For example, when reviewing a legal agreement, mark out the beginning of important clauses and insert it into the TOC.

- When it makes sense to organize TOC items in special groups such as “Review Worthy” or “Insights” or “Confusing” according to your needs. Both AutoTOC and MiniTOC adhere to the page order when building the TOC, whereas you have complete control in structuring the TOC when using the Push Text feature.
- When the PDF has too many different fonts such that AutoTOC discards many of the low frequency fonts and only constructs an incomplete TOC.
- When the PDF has too few fonts such that AutoTOC and MiniTOC generate too many TOC entries. Instead of deleting many unwanted TOC items, it may be easier to use Push Text feature to only add wanted items to the TOC.
- When the font information in the PDF has “irregularities” such that parsing the fonts using AutoTOC leads to situations where heading text is split up over 2 or more TOC items. When using Push Text, the entire selected text is inserted as a single TOC item.

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## Solo Editing

The “Add Row” and “Add Child” toolbar buttons will insert a new “empty” TOC item with a link to the top of the currently open page of the PDF. Unlike the Push Text commands, the TOC item created this way does not point to any specific point on the page. Use these toolbar buttons when you want the PDF to open right to the top of a particular page.

Any TOC item and its page number can be edited in place.

First select the TOC item. Hit enter/return to start editing the TOC title. Hit Tab to switch to editing the page label.

Alternatively, hold down CMD key and double-click on the TOC item’s page title or page label to begin editing. This is the default behavior. In the Preferences dialog for PDFOutliner version 1.4 (shortcut CMD-comma) you can easily

change this behavior such that double-clicking any TOC item will immediately allow editing, and to follow the link, hold down the CMD key and double-click.

Solo Editing is a quick way to fix typos or trim the title of the TOC item.

You can select several TOC items and edit them together using commands under the Outline menu.

For selecting multiple TOC items, use CMD-click and SHIFT-click for similar selection behavior as in other Mac OS X applications. You can also use the Outline menu > Select TOC items submenu commands if you want to select all TOC items or TOC items at a specific level in the hierarchy.

For renaming multiple TOC items quickly, PDFOutliner provides four commands:

- Find/Replace for fixing spelling mistakes, substituting abbreviations and other editing tasks.
- Sequential numbering of selected TOC items, including an optional prefix to organize TOC items into neat sequences.
- Add a Prefix such as “Ch ” before the selected TOC items to distinguish chapter headings from the others, if so required.
- Change case to titlecase, uppercase or lowercase.

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## **Nudging into Shape**

Any TOC item can be selected and moved in the TOC hierarchy by holding down the Option key and using the arrow keys for direction. The right arrow key will indent (“demote”), the left arrow key will outdent (“promote”), the up arrow key will move it above its sibling and the down arrow key will move it down the list. Only the left and right arrow keys change the level of the selected TOC item in the TOC hierarchy.

The nudging shortcuts (Option and arrow keys) help you easily convert a flat list of TOC items into a hierarchy. These are especially useful in quickly cleaning up the list of TOC items generated using MiniTOC and Push Text commands.

For a PDF you intend to skim page to page, use the Push Text commands to create a list of interesting TOC items and subsequently organize it into a meaningful TOC hierarchy using the nudging shortcuts.

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## **Bullseye Linking**

Bullseye Linking is a new feature in PDFOutliner version 1.4.

You can create a TOC link to a precise point on the PDF page.

To get started, double-click anywhere on the PDF page and start dragging. A red bullseye symbol will appear where you double-clicked and another will follow the mouse. You can drag this specific location to the TOC.

If you drag the bullseye on top of an existing TOC item in the TOC hierarchy, its link will be updated to point to the bullseye.

You can also drag the bullseye to the TOC hierarchy and use the visual cues to insert a new TOC item at the specified location in the hierarchy.

The bullseye point you select will become the top-left corner of the PDF view when you follow the TOC link.

### ***When to use Bullseye Linking:***

- For detail-heavy PDFs such as engineering drawings where you want to zoom into a specific view of the PDF. When following the TOC link, the page will be repositioned such that the bullseye's location becomes the top-left corner of the view. The actual zoom with respect to this top-left corner is controlled independently in your PDF viewer.

- For PDFs containing scanned documents where no text is selectable and consequently the Push Text feature doesn't work. Use bullseye feature in PDFOutliner to put together the TOC for your scanned documents. For example, add a TOC to a signed and scanned legal agreement linking into specific clauses of interest.
- For custom placement of the top-left corner corresponding to a TOC item. When using the Push Text feature, the view may be "too tight" with the heading text squished in the top-left corner. Use bullseye linking to drag over and override the link for any existing TOC item.

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Please also visit the onekerato support page ([www.onekerato.com/support.html](http://www.onekerato.com/support.html)) to offer feedback and suggestions to guide the development of PDFOutliner.



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