



Adobe Acrobat 9 Professional Basics



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Getting Started

Adobe Acrobat 9 Professional is a product designed to change many kinds of files into PDF documents. PDF stands for portable document file. PDF documents are very portable in that they are smaller files than files created in typical word processing programs. For example, a Word file of 235 MB turns into a 495KB PDF file. This makes PDFs very good to use online or for email. Security can also be added to PDF documents. PDF files can be opened and read with a free downloadable reader in any computer platform: PC, MAC, Linux/Unix. The free reader is available to anyone from:

<http://www.adobe.com/products/acrobat/readstep2.html>

Remember the Reader does not create PDFs; it only opens them so they can be read by anyone.



A limited time (30 days) trial version of the full program of Acrobat 9 can be downloaded for free from:

<http://www.adobe.com/products/acrobatpro/tryout.html>

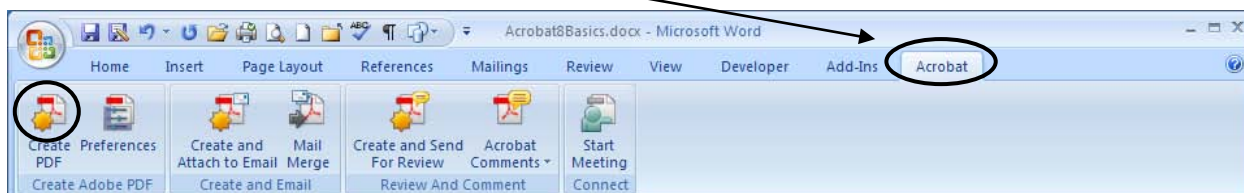
Faculty, staff and students are eligible to purchase the Education Edition at a reduced price with valid academic identification.

PDF Documents

PDF documents are usually created first in other applications such as Word, Excel, Outlook, PowerPoint and can also be created from web pages or image files. Acrobat Professional is not considered an authoring application, but works in connection with many types of applications. In other words, you would create your document in Word, Publisher or InDesign and then turn it into a PDF document to use. The PDFs would be created from the originating application. PDFs can also be created from hard copy documents that can be scanned into Acrobat Professional and then used as any digital file. New to Acrobat Professional 8, documents can be created from a blank page within Acrobat Professional. This is normally used only for small sparingly formatted documents.

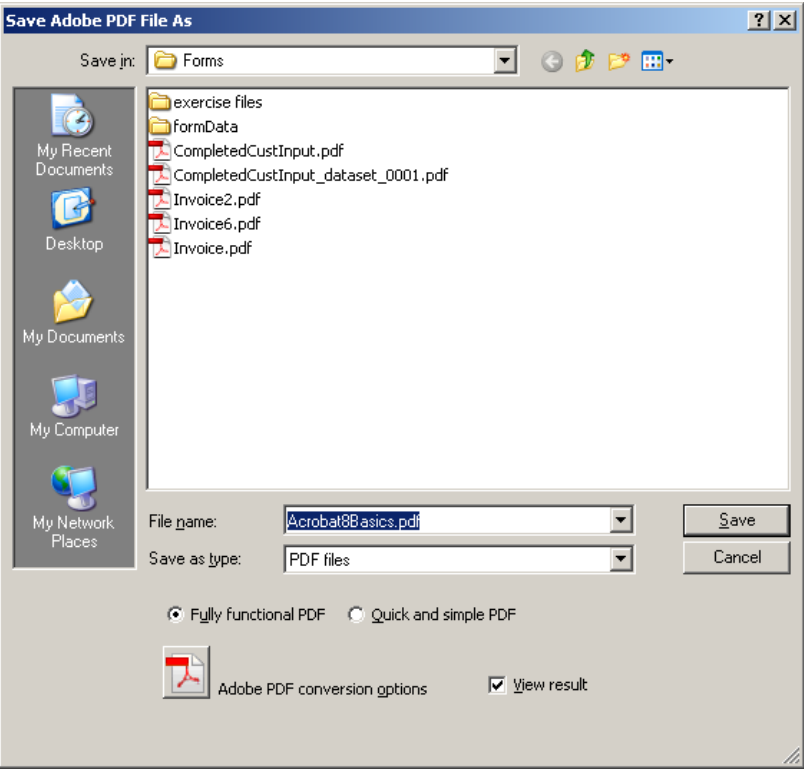
Creating PDF Documents from Originating Applications

There are several ways to create PDF documents. The most common way is to use the **one click** button in the originating application. For example, in Word, once Acrobat Professional 9 is installed, there should be an Acrobat tab and an Adobe ribbon available

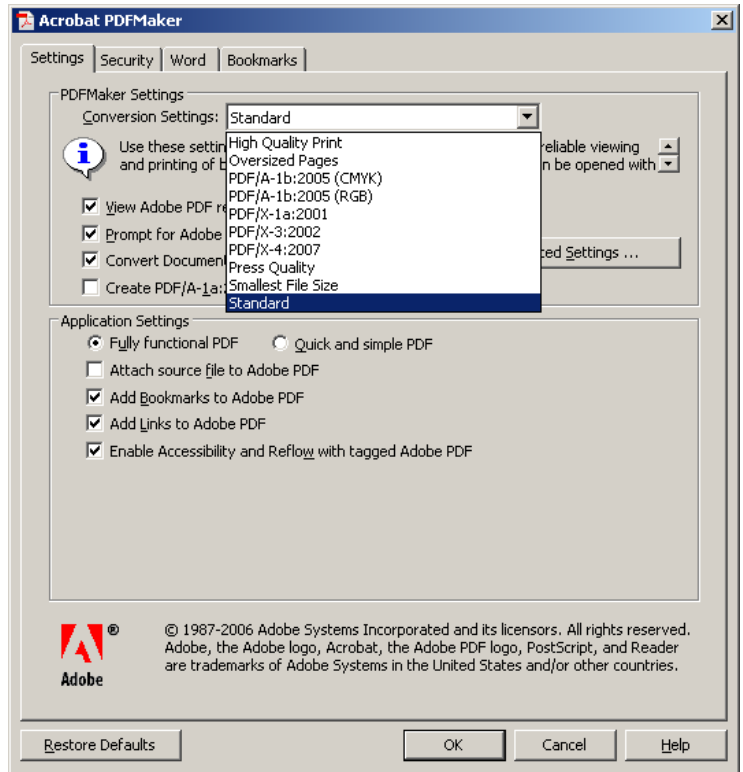
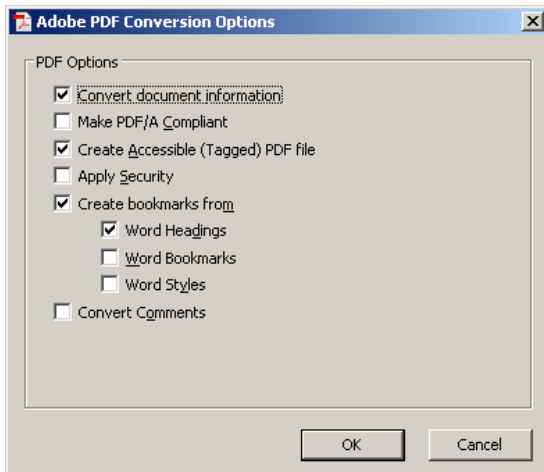


With the document open in the originating application, click on the Create PDF button. This will prompt you to save your original document if you have not already done so, and then ask where you want to save the PDF and what you would like to name it. It can be named exactly the same as the original document as it is a different type of file and will have a different extension. For example if your original file is called officeprocedures.docx then the pdf could be officeprocedures.pdf. It is a good idea to save

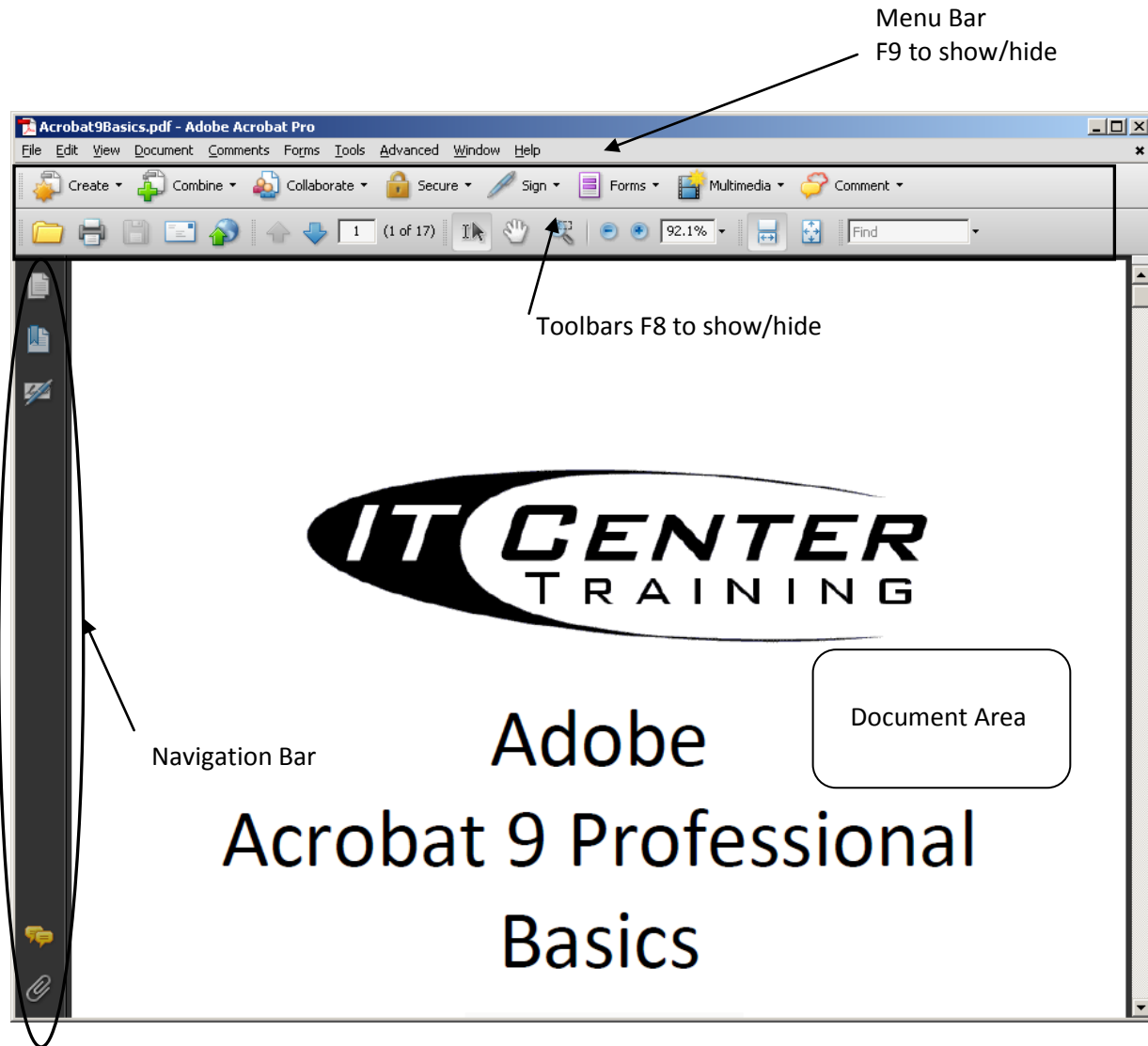
the PDF in the same location as the original in case you need to go back and make major changes. As you will see later, changes can be made to a PDF document, but if you have major changes it is sometimes easier to go back to the original, make the changes and recreate the PDF.



When using the one click button, Acrobat uses the settings currently in effect. If you want more control over the settings choose Adobe PDF Conversion Settings or Preferences. This gives options for making bigger or smaller files. Higher quality produces larger files; however, smaller files may be good enough for web or email applications. PDF/A settings are used for archival situations for long term preservation of digital documents. Other settings may be required when using professional printing services. Under normal circumstances, the Standard conversion settings work fine.



The Adobe Acrobat 9 Professional Interface



Toolbars

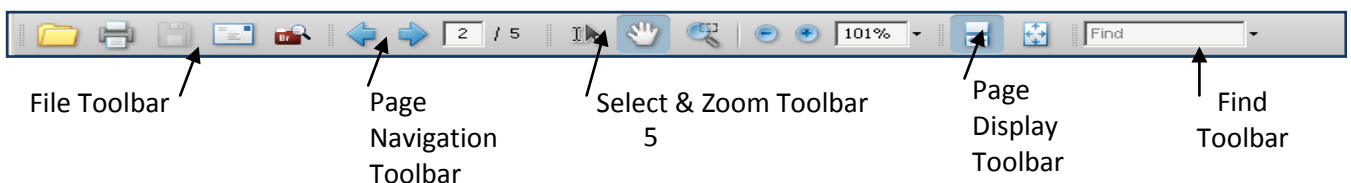
Toolbars help you work in Acrobat by giving you task related groups of icons. The toolbars can be rearranged to suit your preferences. The toolbars have “grabbers” which are the gray stripe at the left side of the toolbar. If you hover over the grabber area you can click and drag the toolbar out to be a floating toolbar instead of a docked toolbar. They can then be rearranged or closed.

Task bar



This toolbar allows you to start different tasks

Default Toolbars



If you don't see a toolbar that you need, you can go to the **View Menu** option, choose **Toolbars** and a list of the available toolbars will open. Alternately you can right click in an empty space in the toolbar area and get the same list of toolbars. The ones that are checked are visible and if you see the one you want and it is not checked, click on it and it should open up for you. For example the Advanced Editing toolbar is not open by default when you open the Acrobat program. If you need to edit text do other alterations to your document you can turn on the Advanced Editing toolbar to have access to those items.

New Toolbars may show up as floating toolbars. They can be docked by clicking and dragging on the title bar and moving them up to the toolbar area. You will see a gray line where the toolbar will dock (snap into place in the toolbar area). If you don't see a gray line when you hover the toolbar over the toolbar area the toolbars may be locked. If you go to the **View Menu** option and choose **Toolbars** or right click in the toolbar area, one option available for the toolbars is to **Lock Toolbars**. Since you have the option of dragging your toolbars around and rearranging them to suit your style, once you get them set the way you want you may want to lock the toolbars so they can no longer be moved or undocked. This is a way to work more efficiently by arranging the toolbars to match the way you use the program. If you have moved the toolbars around and you decide you no longer like the way they are arranged then you can go back to the toolbar menu, **Unlock the toolbars** and then **Reset the toolbars**. They will then go back to the default toolbar layout. Another option on the **Toolbar menu** is whether you want to show Button labels for the icons or not. Some labels are shown by default, and then you have the choice to show all labels or show no labels. You may want to show the labels until you get familiar with the workings of Acrobat and then after a while you may want to free up more toolbar space and not show any of the labels.

File Toolbar



1. Open existing PDF file
2. Print document
3. Save document with changes
4. Attach current document and email
5. Upload to Acrobat.com

Page Navigation Toolbar



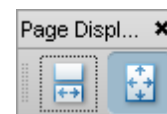
To Navigate through your document:
 Use the left facing arrow to go to previous page
 Use the right facing arrow to go to the next page
 Type in the page number to go directly to a specific page

Select and Zoom Toolbar



1. Select text and/or images for copy and pasting
2. Hand tool – move around the document
3. Marque Zoom – Click and drag around a section to magnify
4. Decrease or Increase Magnification
5. Type in or use drop down for a specific zoom level

Page Display Toolbar



You have options on how to view your pages. The first icon by default shows the page full width and you can scroll through the pages. The second icon shows the whole page, one page at a time.
 Other options available on right click are to show two pages at a time or show full screen.



Navigation Pane

On the left side of the interface there is a dark gray area with several icons. This is called the Navigation Pane.

The top icon shows a thumbnail preview or a small graphical representation of all the pages in your document. Clicking on the icon will open the thumbnail images. Click on the icon again to close the thumbnail pane. As you increase and decrease the size of the frame, you will be able to see more or less of the pages in your document.

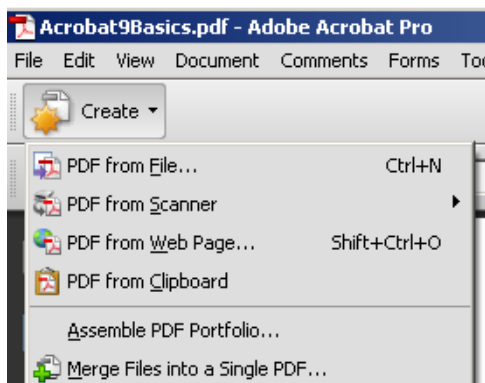
The second icon allows you to see and follow bookmarks.

The third icon shows you if there are any digital signatures in your document.

On the bottom of the Navigation pane are icons to show if there are any **Attachments** with your PDF document or if there are **Comments** in your document.

Creating PDF Documents from within Acrobat

One of the main reasons we use computers is to save time or work more efficiently. So when we need to create PDF documents, we want to do it in the most time efficient way. Many times we will be creating the original document and will choose to create the PDF from that application. Other times we may not have the document open at all and in that case we can open Acrobat and create a PDF directly from the Acrobat application. To do this, start by going to the **Taskbar**. Choose **Create PDF**.



Several options are presented. PDF documents can be created from files anywhere on your computer.

Choosing **From File** will bring up the open dialog box so you can navigate to the file you need. You can ctrl + click to open several files and a PDF document will be created for each one. You do need to have the originating application on your computer. In other words, you would not be able to create a PDF from a Word file unless you had the Word program already installed.

Choosing **Merge Files into a Single PDF** works a little differently. You can create one PDF from files you can

choose. They can be different file types, but Acrobat will in one step create the PDF from the different files and make them all into one file.

From Scanner allows you to scan hard copies directly into Acrobat. If you are going to want to edit the document make sure the Make Searchable (Run OCR) is checked.

From Clipboard will create a PDF from any image or other content you had placed on the clipboard by copy or by print screen.

After the PDF is created you may be all done with the document and will either put it on a website or email it. But there are several things you may need or want to do before you are really finished with the document.

Security

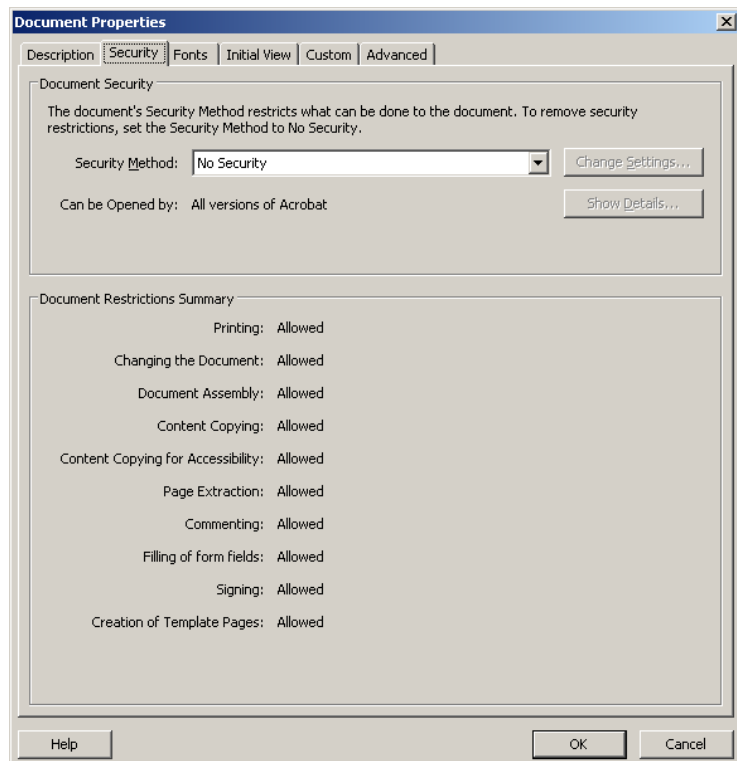
One of the benefits to using Acrobat PDF files is the ability to add security to the document.

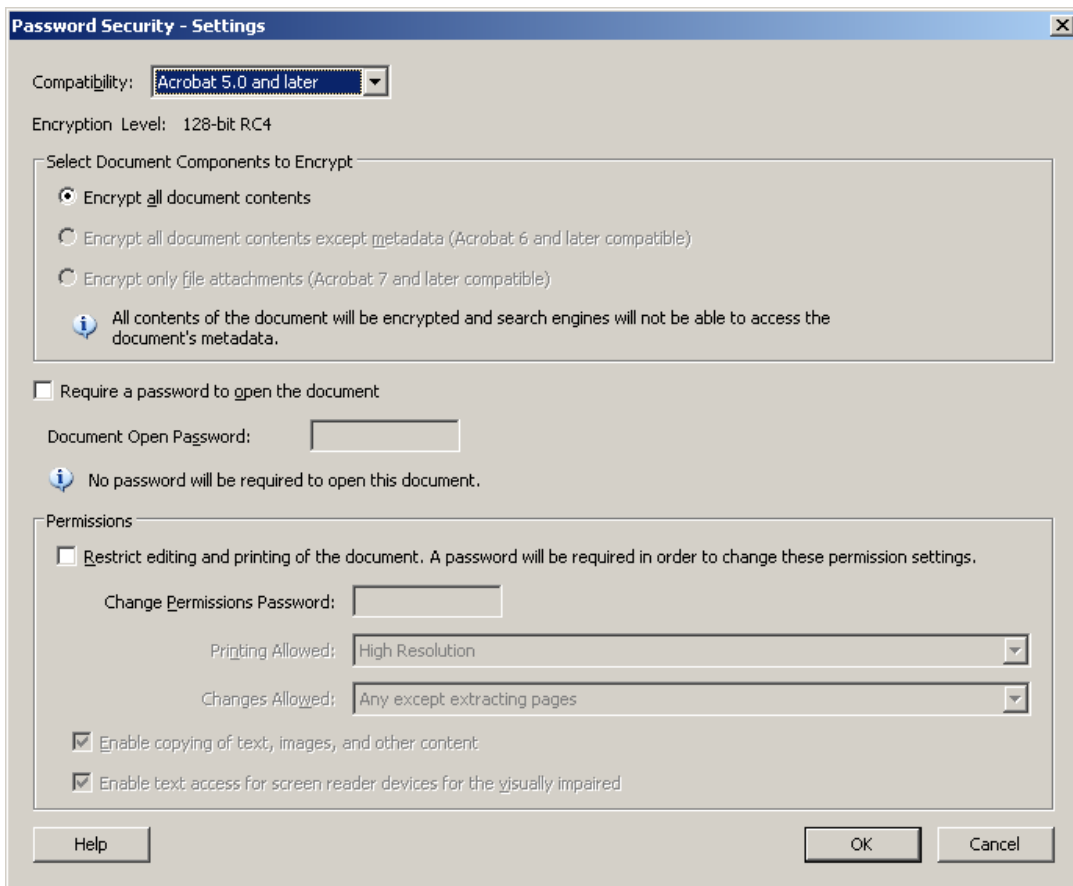
Document Security allows you to:

- Require a password to open the document
- Require a password to change the security of the document
- Prevent or allow your document from being printed
- Prevent or allow your document from being changed or modified
- Prevent or allow others from copying text or graphics
- Prevent or allow others from adding/changing comments or filling out form fields

To add Security to your document from the **File** menu choose the **Properties** option. When the **Document Properties** dialog box opens choose the **Security Tab**. Or you can start with the **Secure** button on the Taskbar and choose **Show Security Settings**. If you have created this document it will have a **Security Method** of: **No Security**.

Security can be added using a password. Click on the **Security Method** drop down and choose **Password Security**.





In the Compatibility section, you need to determine if the people you will be sharing this document with will have an older or newer version of Acrobat. Some older computers may still have Acrobat 6 for example if they have an old Operating System. If you know you will only be sharing with people that have up to date equipment, then you could go higher on the compatibility version. The higher the version (newer Acrobat Program): the better the security.

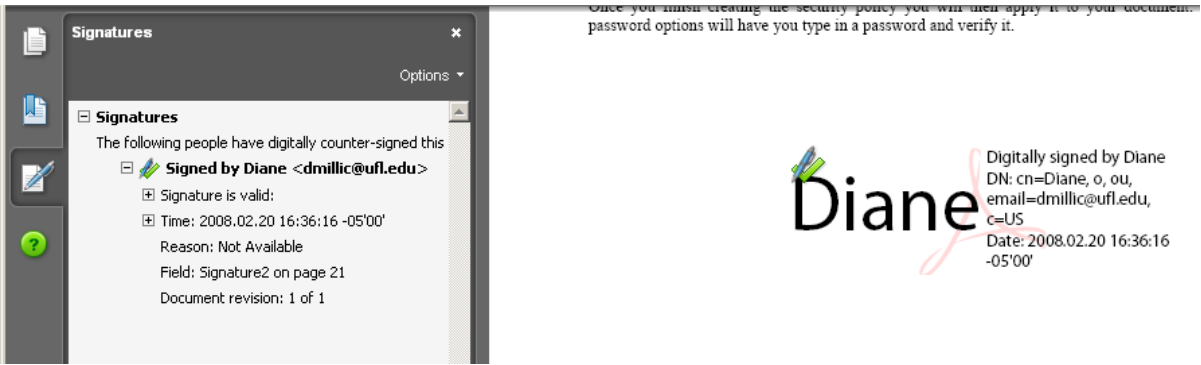
Choose what you want to encrypt. If it is very important to encrypt (protect) all the information, then be sure to choose Encrypt All Document Contents.

The highest security will be applied if you **Require a Password to Open**. For anyone to open the document at all, they would have to have the password.

The next level of security would be **Permissions**. This level of security lets you decide if you want the person viewing your document to be able to copy, print or change your document. One common setting of Permissions is to only allow Changes of **Filling in Forms and signing existing Signature fields**. If you do not want to allow copying of text or images make sure that check box is unchecked. However for accessibility, leave the last check box checked. When you set Permissions, Acrobat will tell you that there are third party programs that may be able to get through Permissions Security. But under normal conditions these permissions will be in effect. The idea is that only people with the Permissions password will be able to make changes.

Signatures

A digital signature, like a conventional handwritten signature, identifies a person or entity signing a document. Unlike traditional signatures, however, each digital signature stores information “behind the scenes” about the person signing and about the exact state of the document when it was signed. Once a document is signed, any changes made since the signing are recorded in the Signatures palette. You can track changes made between signings using the Signatures pane in the Navigation Bar or by comparing signed versions of the document.

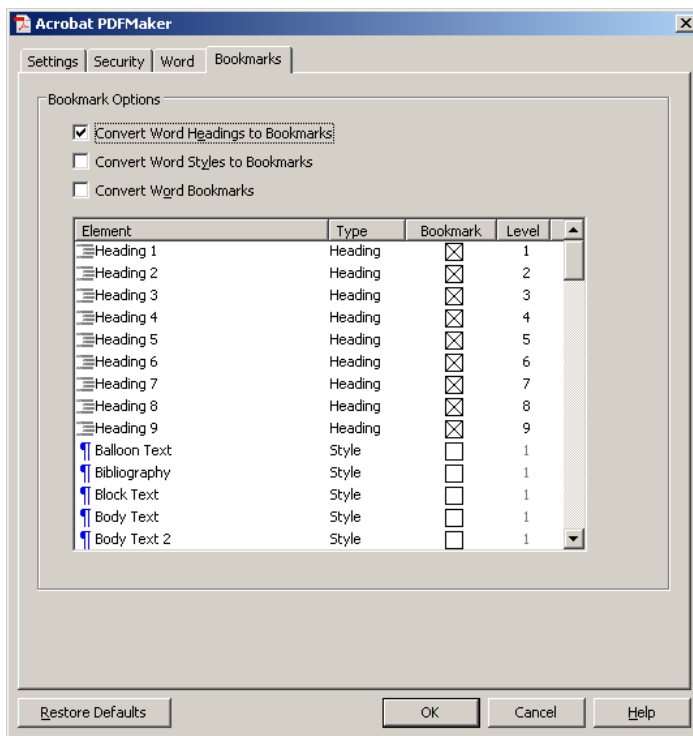


This is a picture of a digitally signed document and the Signature pane. It tells when and by whom the document was signed. If there were changes made after it was signed it would note that as well. If a true digital signature is created, there is a public and a private key. You would send the public key to whoever was to receive your signed document. Then when they got the signed document it would look at the public key and make sure everything matched and would say it was a good signature.

Bookmarks

Automatically from Word

When you create a PDF document you have the ability to have bookmarks in your document. The bookmarks are links to areas in your document. So, for example you could have a bookmark for each chapter heading or sub-heading. If your document was created in Word and you used styles with Heading 1, Heading 2, etc., Acrobat can create the bookmarks for you automatically. When you start to create the PDF, go to the Acrobat Tab in Word 2007 (the Adobe PDF menu option in Word 2003 and earlier). Click on Preferences (Change Conversion Settings). On the Bookmarks tab, make sure the **Convert Word Headings to Bookmarks** is checked and there are checkmarks in the bookmark section for Headings.

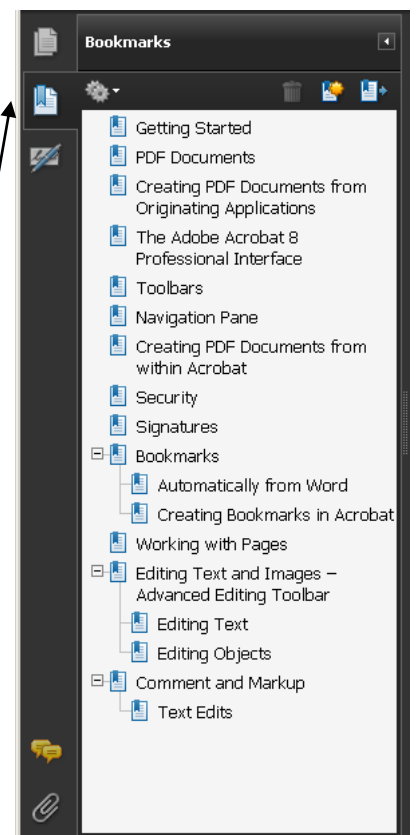


Creating Bookmarks in Acrobat

If your document was created in other ways and you want to add Bookmarks you can do that also. Or if you want to add Bookmarks in places other than Headings you can do that as well.

- Choose the Bookmark icon in the Navigation pane.
- Navigate to the spot where you want the bookmark in your document.
- Click on the New Bookmark icon. The new bookmark will be placed below the currently selected bookmark.
- Name the bookmark.
- Right click and choose Set Destination.

Bookmarks can also be rearranged by clicking and dragging within the bookmark pane.



Working with Pages

Even though the PDF documents are really supposed to be a finished product, there is a lot of flexibility in an Acrobat PDF document. The pages in the document can be reordered in the **Pages** pane of the **Navigation bar** by clicking and dragging the page thumbnail to the new location. The Pages pane lets you delete a selected page, by selecting the thumbnail (click on the thumbnail – Ctrl+click to select more than one page) then clicking on the trashcan button. The Options menu shows many of the Page options such as: Insert Pages, Extract Pages, Replace Pages, Delete Pages, etc. Directly from this view, you can crop or rotate your pages as well as set page transitions which can be seen when your PDF is viewed in full screen mode. **Inserting pages** allows you to insert pages from other files. **Replace pages** allows you to delete an existing page and replace it with a new page. **Extract files** allows you to take part of the document out and create a new file with it. When extracting you can delete the extracted pages or leave them intact in the original file. **Deleted pages** are permanently removed from your document.

Editing Text and Images – Advanced Editing Toolbar

The Advanced Editing toolbar can be accessed in several ways. From the View menu options choose toolbars and click on the Advanced Editing toolbar. From the Tools menu option, choose Advanced Editing and you can then choose a tool or choose to show the toolbar. From a right click in an empty toolbar area, choose Advanced Editing.



1. Select Object Tool – Allows you to see all links and form fields.
2. Button Tool – Create an interactive push button
3. Article Tool – Allows you to link parts of your PDF as one “article” or “story”. For example, if you are reading a newsletter PDF and the story on the front page is continued on page 4, if the Article tool had been used to link the story together, you could double click on the first part and it would take you automatically to the second part.
4. Crop Tool – Allows you to crop the current page, to remove any excess from the outer edges of your document.
5. Link Tool – Creates a hyperlink to another page in your document, another file, or a web page.
6. TouchUp Text Tool – Allows you to select and edit text in your document.
7. TouchUp Reading Order Tool – Correct structural mistakes in a tagged document
8. TouchUp Object Tool – Allows you to select and edit objects in your document.

Editing Text

Once you have chosen the **Touchup Text Tool** you can edit the text in the document. Select the text by clicking and dragging with the Touchup Text Tool. You can correct spelling errors fairly easily. To delete words or add words is a little more difficult depending on the space you have available. The text does not flow from page to page as it does in typical word processing applications. And if you move text, images or other objects do not move with it. For example if you have added a hyperlink to an area of text and you move the text you will also have to go back and move the hyperlink. A hyperlink is considered an object.

Editing Objects

To change objects such as images choose the Touchup Object Tool. You then have the option of clicking on the object and dragging to move or to click on it to select it and delete with the delete key on your keyboard or select and right click for several more options such as rotate or flip. Again, remember that deleted an image does not make the text flow to fill in the empty space.

Comment and Markup



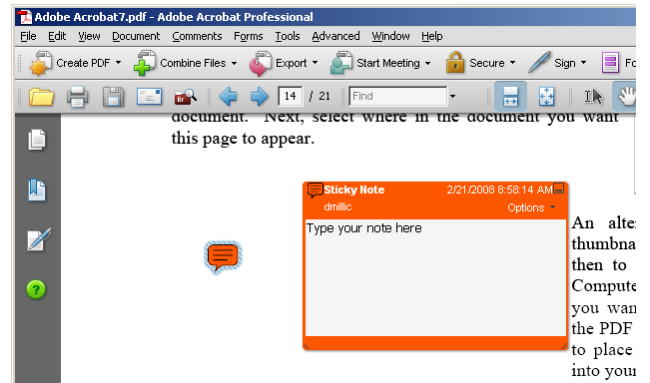
PDF documents can be sent to others for review or comments.

The **Comment & Markup Toolbar** can be accessed in several ways. From the View menu options choose toolbars and click on Comment & Markup. From the Tools menu option, choose Comment & Markup and you can then choose a tool or choose to show the toolbar. From a right click in an empty toolbar area, choose Comment & Markup.

The **Sticky Note** tool will allow you to add a note to the document just as if you were placing a real sticky note paper on the page. Choose the tool and then click on the document where you want to put the note. It puts a small icon on the page at that point and opens up a box to write in.

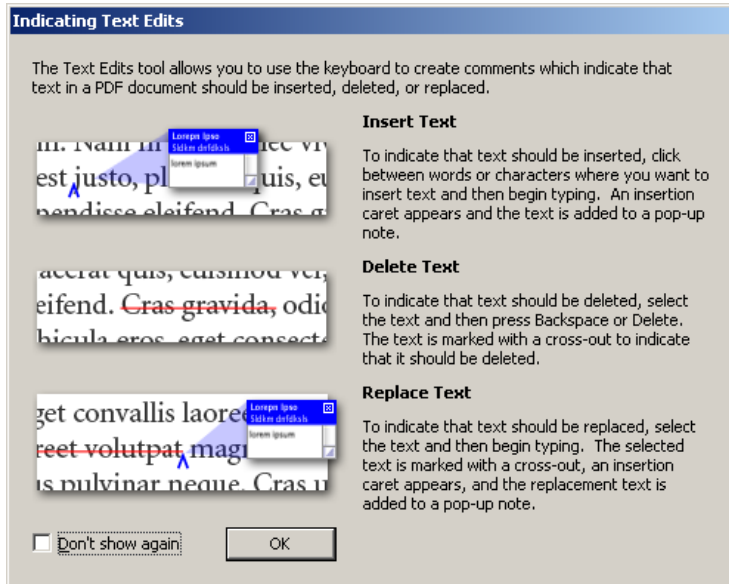
You can then hide the note by clicking on the minus in the upper right corner and just the small icon is visible. When you hover over the small icon it will show what was written and by whom. Or you can click on the icon to open the box up again. The Properties menu in the Options drop down will allow you to change the

color of the note, the style of the small icon, author information, etc.



Text Edits

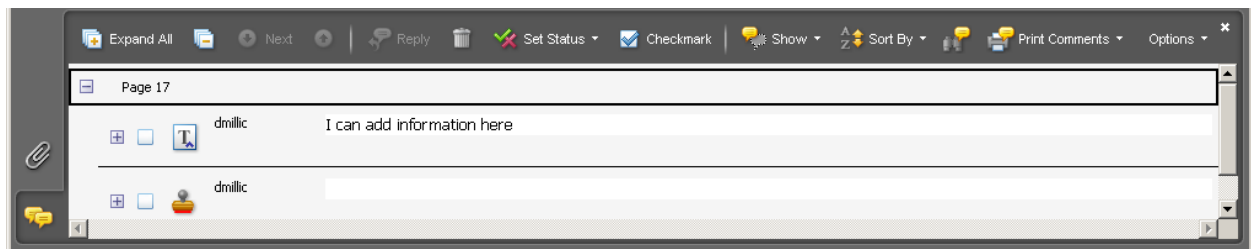
The **Text Edit** tool allows you to indicate where text should be inserted, deleted or replaced. When you choose this tool the first time the box below will open. This explains how to use the **Text Edit** tool. Once you are comfortable with the tool you can check the box to **Don't show again** in the lower left corner.



Text edits will show up with the author of the edit and the information about the edit in the same format as the Sticky notes. The author information and colors, etc can be changed in the same way as the Sticky notes were changed with the Options drop down and choosing properties.

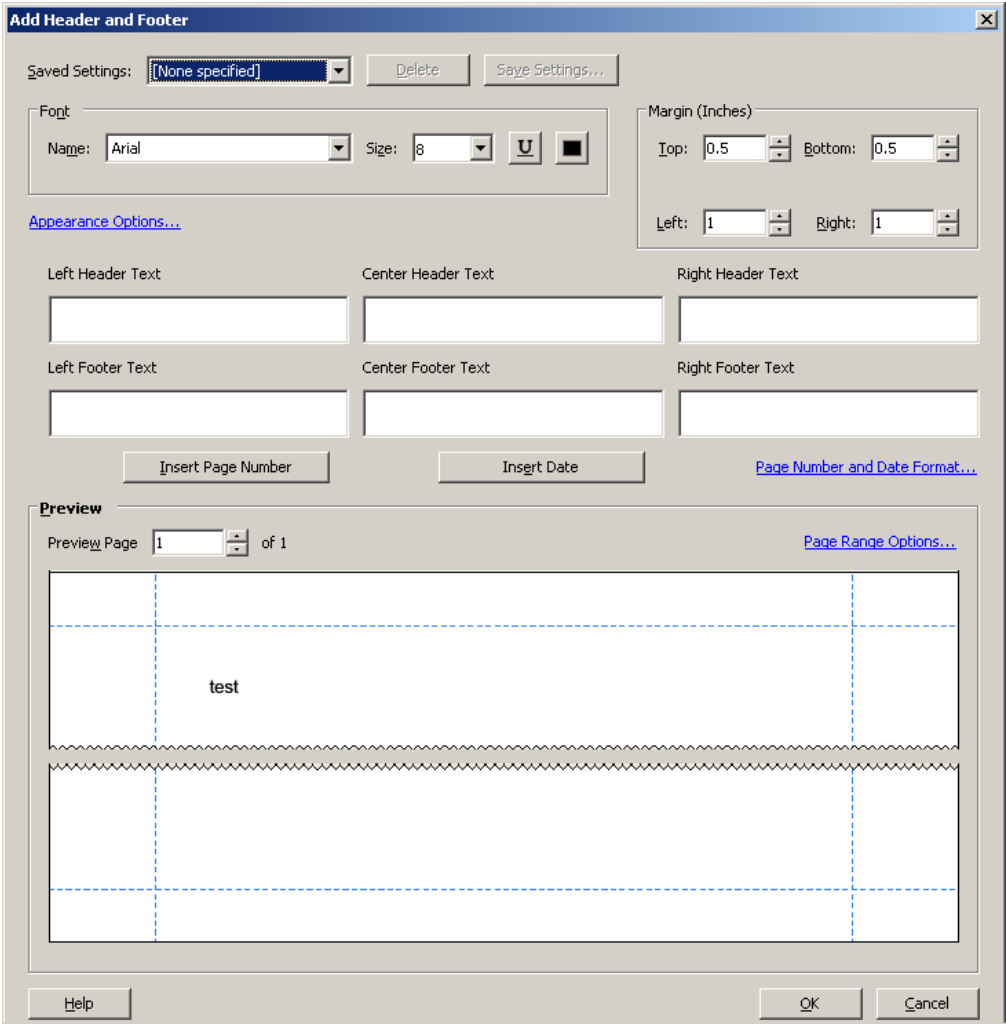
The next tool is the **Stamp** tool. The stamp tool can stamp your documents with your information and date and time information to show when the document was received or created. Choose the stamp you want to use and then click in the document where you want the stamp to be placed. You can create your own stamps with information or with images using the Create Custom Stamp option. You can create a logo stamp with your company or department logo and stamp your documents with that. If your logo changes, you can delete the original and stamp on the new one.

Once comments have been added to a document they can be reviewed as you go through the document or you can use the Comment button in the Navigation bar to see all the Comments. They can be sorted by page, author, date, or type.



Creating Headers and Footers

From the Document Menu choose Header and Footer then Add, Update or Remove to open this dialog box.



From this dialog box you can add headers and/or footers. Click in the section you want the particular information (ie: date, page numbers, dept info or hyperlinks)

Before adding page numbers or dates, choose page number and date format to choose the way you want those items formatted. For example page numbers could be just 1,2,3 or Page # of Number of pages. Dates could be mm/dd/yyyy or mm/dd or mm/yy. There are several formats to choose from. If you rearrange, add, delete or insert pages you will need to update the headers and footers to correct the page numbers.