

Acrobat 9

Fundamentals

Helpful Links	
What is PDF	1
Create PDF Files Anyone Can Open	
Acrobat Applications	2
Adobe Reader	
Adobe Acrobat Elements	
Adobe Acrobat Standard	
Adobe Acrobat Professional	
Acrobat 9 Pro Extended <i>*Windows Only</i>	
User Interface	3
Methods to Create a PDF	4
PDF Document Version	6
Document Properties Interface	7
Page Display Preferences	8
Acrobat Tools	9
Tool Tips	
Keeping Color Consistent	10
Printing Tip	11
To Print A PDF As An Image	
Type Fundamentals	12
Anatomy of Type	
Font Embed Status	13
Font Substitution	14
Font Attributes	15
Acrobat Distiller	16
Preset Adobe PDF Settings	
PDF/X-1a	
PDF/X-3	
General	17
Editing the General Settings	18
General Continued	
Compression Settings	20
Web or On-screen	
Office	

Press	
Font Settings.	21
Color Settings	22
Saving Job Options.	23
Advanced	
Print Driver Settings	25
Vista Printer Settings	
PDFMaker for Microsoft Office	26
Conversion Settings	
Additional Microsoft Office Conversion Settings	
Checking Your PDF	27
Comment with Free Reader	28
Commenting.	30
Commenting Toolbar	30
Commenting Preferences	31
Creating a Note	32
Advanced Commenting Toolbar.	33
To Delete a Note	33
Indicating Text Edits	34
Markup Instructions	
Markup Tips	
Adding Stamps	36
Stamp Properties	
Creating Custom Stamps	38
Highlight, Cross-Out and Underline	38
Deleting a Highlight, Cross-Out or Underline	
Exporting Comments	39
Summarizing Comments	40
Bookmarks	41
Recognize Text Using OCR	42
Correcting Captured Pages	
Web Capture.	43

Cropping Pages	44
Editing Images.	44
TouchUp Preferences.	45
PDF Optimizer	46
Auditing the Space Usage	
Optimizing a PDF File	
Clean Up	
PDF Portfolios	49
To Create a PDF Portfolio	49

©2010—Kelly McCathran

The information in this handout is furnished for instructional use and is subject to change without notice. No part of this handout may be reproduced or transmitted in any form or by any means, electronic or mechanical (including photocopying) without the expressed written consent of Kelly McCathran.

The software described in this handout is furnished under license and may only be used or copied in accordance with the terms of such license. Creative Suite 4 is a trademark of Adobe Systems Incorporated (“Adobe”), registered in the United States and elsewhere. InDesign, Photoshop, Illustrator, Acrobat & Bridge are trademarks of Adobe Systems Incorporated.

The value of each printed copy of this material is \$20 retail. Reprint rights may be purchased at a discount, depending on the quantity.

Helpful Links

<http://tv.adobe.com>

<http://public.me.com/kmccathran>

<http://www.adobe.com/designcenter>

http://www.adobe.com/designcenter/video_workshop

Kelly McCathran
San Francisco, CA
(415) 312-2459
kelly@onlineinstruct.com

What is PDF

Adobe first introduced Acrobat® in 1993 creating the **PDF** (*Portable Document Format*) open-source file format. PDF is the worldwide standard for secure and reliable electronic document distribution. Regardless of the program and platform (Windows, Mac OS, UNIX®, Palm OS® or Pocket PC™) used to create them, the beauty of PDF documents is that they preserve the fonts, images, graphics, and layout of the original, when created properly. PDF files are compact and can be shared, printed, viewed and searched by anyone using the free Adobe Reader® application. To date, more than 500 million copies of Reader® have been downloaded. Adobe PDF documents are readable and searchable on over 13 platforms.

Typically, PDF documents originate in programs other than Adobe Acrobat but direct PDF creation is possible using JavaScript or some Third-Party applications and plug-ins. The PDF specification is available to anyone wanting to develop tools for creating, viewing, or manipulating PDF documents. Currently, more than 1,800 vendors offer PDF-based solutions.

Create PDF Files Anyone Can Open

There are many different ways to create an Adobe PDF document from a variety of applications. It's important to remember you may not know what platform the receiver is on, or which version of Reader is installed. For this reason, we will cover the Distiller preferences and give recommendations for settings to make your PDF file as compatible and readable as possible.

"There is no universal way to communicate and view this printed information electronically... What industries badly need is a universal way to communicate documents across a wide variety of machine configurations, operating systems, and communication networks."
—John Warnock, Co-founder of Adobe, 1992

Acrobat Applications

Adobe Reader

Formerly called Acrobat Reader, the Adobe Reader is free from adobe.com in the downloads section. With Reader, users can Open, Search, Print and Fill out Forms. If you own Acrobat Professional users of the free Adobe Reader 7 can electronically markup your PDF document. With Acrobat 8 & 9 they can now save Form data.

Price: Free

Adobe Acrobat Elements

In order to purchase Acrobat Elements, there must be a minimum of 1,000 users. Elements gives Microsoft Office users the ability to create PDFs from Word, Excel and PowerPoint (Microsoft Office).

Price: Check with Adobe

Adobe Acrobat Standard

With Acrobat Standard users can create PDFs from Microsoft Office, Distiller or the Adobe PDF printer.

Price: \$299 or \$99 upgrade

Adobe Acrobat Professional

The most comprehensive version of Adobe Acrobat, includes high-end tools for Prepress, Forms Creation and additional features that are not always necessary for the light Acrobat user.

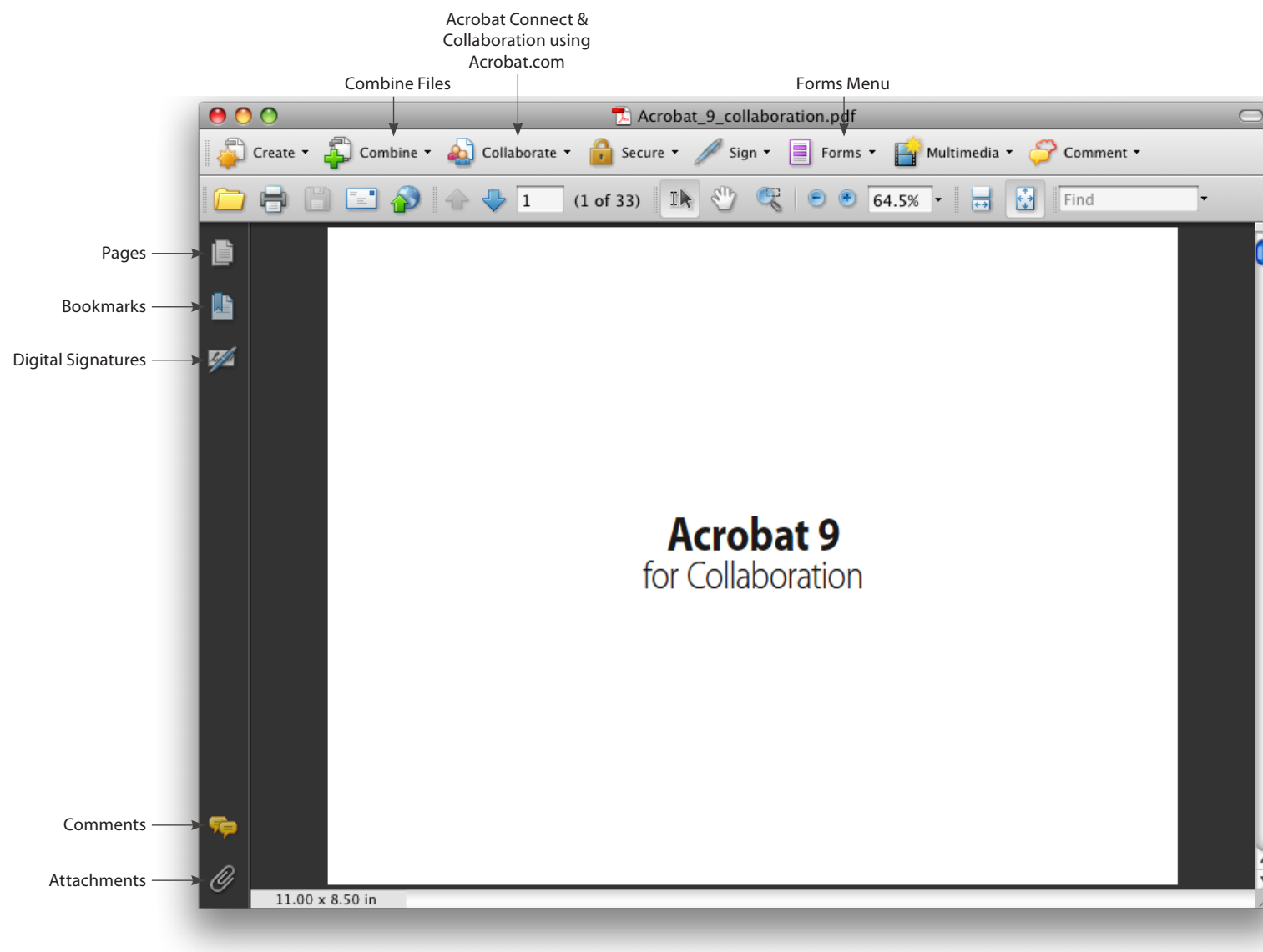
Price: \$449 or \$159 upgrade

Acrobat 9 Pro Extended **Windows Only*

Adobe® Acrobat® Pro Extended includes all the features of the Professional version of Acrobat 9 software, plus Adobe Presenter and Adobe LiveCycle® Designer.

Price: \$699 or \$229 upgrade

User Interface



Methods to Create a PDF

There are a variety of methods for creating PDF (*Portable Document Format*) documents, some of which are notably better than others. Once the PDF has been generated, users will have a file that is viewable, searchable, printable on over 13 platforms. In addition, this file will have all fonts and images used embedded (stored) in the document, not linked to the original.

1. PDFMaker ✓

PDFMaker is available on either PC or Mac, but is only fully functional on the PC. Users press one button in Microsoft™ Office applications. This feature writes PostScript, Distills and creates Bookmarks, Links and Tags.

2. Print to Adobe PDF Printer ✓

With this method, from any application, users can print to the Distiller printer driver. This will create a PostScript file (behind the scenes) and generate a PDF based on the selected set of Job Options. Distiller installs automatically when users purchase the full version of Acrobat.

3. Print to PostScript and Distill ✓

This is the longest lasting and typically preferred method for Press Ready PDFs. On the Windows platform, some PostScript files may have the extension .prn instead of .ps.

4. Save As...

Programs such as Illustrator and Photoshop offer a native Save As PDF. This technique does not always fully embed the fonts, or allow the user full choices over compatibility settings in earlier versions. The new Creative Suite 2, 3 & 4 offer global PDF settings, so you may accurately build PDF documents directly from these applications.

5. Native Export to PDF...

Programs such as InDesign CS2, CS3, CS4 & CS5 ✓ and QuarkXPress 6.x - 8.x or newer offer a native Export to PDF. Check with your print shop to see if they accept these files. Quark is more problematic than InDesign.

✓ Recommended Method

6. PDFWriter

*PDFWriter is a quick and dirty non-PostScript printer driver that converts files directly to Adobe PDF from any application. It is designed for documents that contain only text. PDFWriter installed automatically with Acrobat 4, but is only available as a custom install with Acrobat 5. This method **should never be used**, there may be a lot of printing related issues with files created with PDFWriter. This driver was designed for applications that can not write PostScript, or with documents that don't contain complex graphics.*

7. OS 10 on the Mac

Mac OS 10 (X) now offers creation of PDF directly through the print dialog. This saves the PDF with the images at actual resolution, but only includes the characters used, or a Subset, of the fonts.

8. Screen Shot PDF

OS 10 on the Mac also allows the capture of a screen shot (picture of the screen) as a native PDF, through Command Shift 3 or Command Shift 4. They appear on the Desktop as Picture 1.pdf (Picture 2, 3, etc.). In Windows users can hit Alt Print Screen and choose in Adobe Acrobat File > Create PDF > From Clipboard Image.

9. Third Party

There are many Third party products which offer a very inexpensive, if not free creation of PDF files. Check with your Print Service Provider to see if the one you are choosing will be building printable PDFs.

10. JavaScript

For the programmers out there, users can create a blank PDF file via a JavaScript command:

```
app.new Doc ();
```

11. Web Capture. **File > Create PDF > From Web Page (Command Shift O or Ctrl Shift O)**

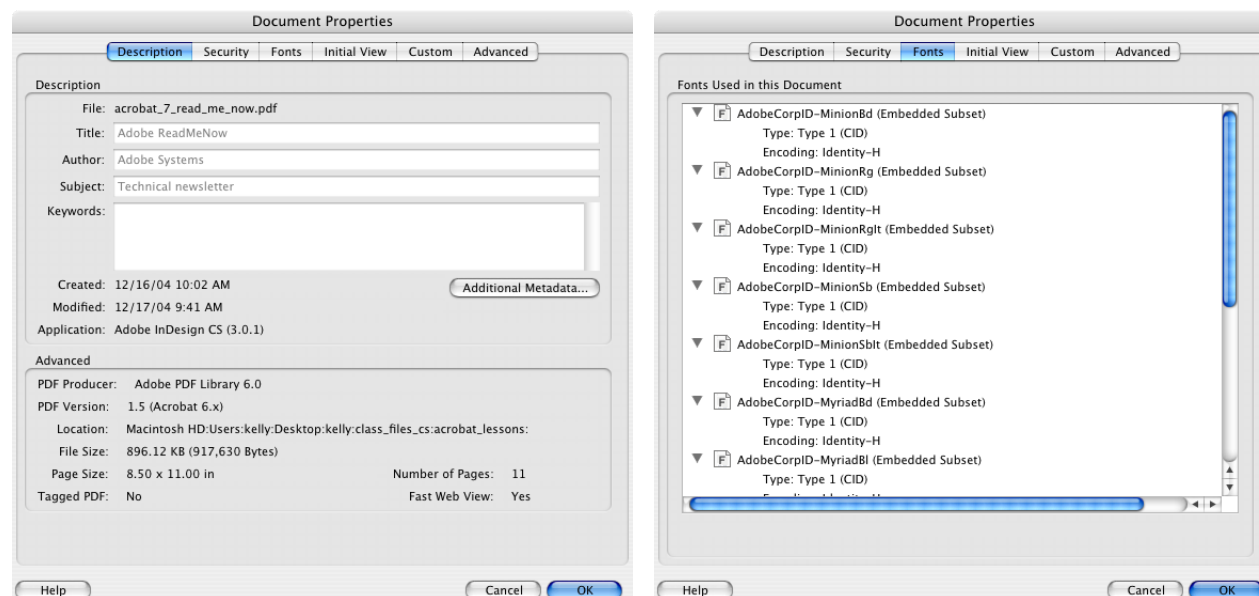
PDF Document Version

Acrobat	PDF	Differences
Version 3	1.2	No Spot Color Support, 40 Bit Encryption
Version 4	1.3	ICC Color Management, 40 Bit Encryption – Flattened Transparency and no Layers
Version 5	1.4	Transparency, 128 Bit RC4 Encryption
Version 6	1.5	Layers, Transparency, 128 Bit RC4 Encryption, Embedded Multimedia content
Version 7	1.6	Layers, Transparency, 128 Bit RC4 & AES (Advanced Encryption Standard) Encryption, Embedded Multimedia content
Version 8	1.7	Major improvements to 3D, new printer controls, a PDF can now include default print characteristics including paper selection and handling, page range, copies, and scaling, support for portable collections, Poly-line & Polygon annotations can now have scale & measurement-aware dimensions attached to them, More Tags Portable Collections The intent of portable collections is to present, sort, and search collections of related documents, such as email archives, photo collections, and engineering bid sets.
Version 9	1.8	Version 9 had only minor updates to the specification and Adobe didn't produce a manual for it.

Document Properties Interface

No PDF file should leave your system without first inspecting it's **Document Properties File > Properties** (**Command D** or **Ctrl D**). This will tell you something about how the file was created.

- The Version of the PDF file
- Fonts embed status: Fully Embedded, Embedded Subset or not in the file at all
- Security settings
- Initial View/Open Options

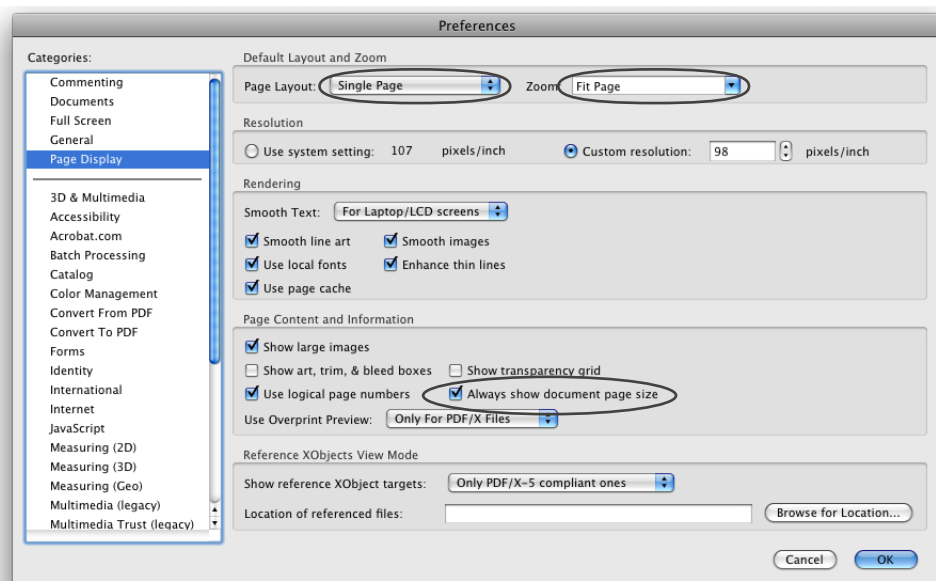


Page Display Preferences

If you have files with Flattened Transparency (Acrobat 4 or older), you should disable the Smooth line art and Smooth images in the Page Display preferences **Acrobat > Preferences (Mac)** **Edit > Preferences (PC)**. This will prevent the White or Black data lines that are caused by Anti Aliasing.

Several other preferences I recommend changing here are:

- **Single Page** view, so you don't split part of one page and part of another on the screen as you scroll down
- Zoom to **Fit the Page** in window when you open a PDF, so you don't have to hit Fit in Window all the time
- Always **Show the Document Page Size** in the lower left corner of your screen



Acrobat Tools

The Acrobat toolbar is a set of toolbars, some of which are hidden. Some of the tools that were visible by default in previous versions of Acrobat appear on hidden toolbars, such as the Commenting and Advanced Commenting.



Tool Tips

Pause the mouse over the tool to see the name of that tool. To show or hide toolbars **Choose View > Toolbars**, and select the toolbar to show or hide. If a check mark appears next to the toolbar name, this indicates that the toolbar is already showing.

Also *Right-click (Windows)* or **Control-click (Mac OS)** the toolbar area, and then select the toolbar to show or hide.

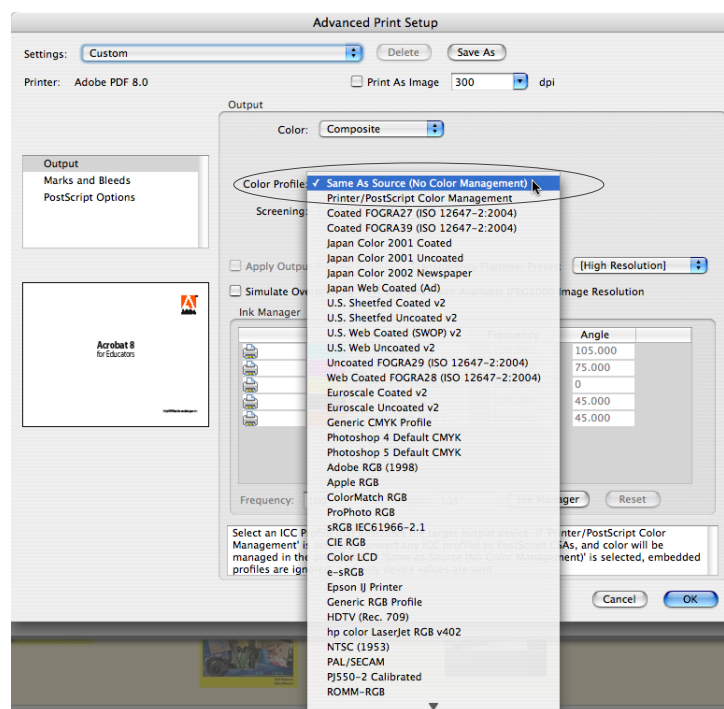
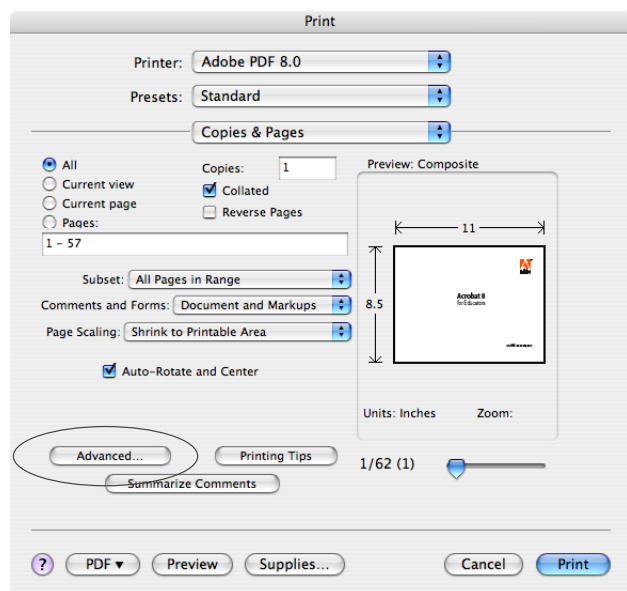
Or click the arrow next to a Task toolbar button and select the associated toolbar name.

To hide all toolbars, choose **View > Toolbars > Hide Toolbars (F8)**. To display the tools again choose **View > Toolbars > Show Toolbars (also F8)**.

Choose **View > Toolbars > Reset Toolbars** to display the default set of toolbars.

Keeping Color Consistent

So that Acrobat prints color consistently, you need to turn off Printer/PostScript Color Management in the Advanced section of Acrobat's Print dialog box. **File > Print** then click **Advanced**.



Printing Tip

When All Else Fails **Print The PDF File As An Image**

Printing the PDF file as an image may enable the file to print, but it doesn't identify the source of the problem, sometimes in the print world you just need to meet the deadline. Printing as an image will usually take longer, but it will get the file out. This is often a good technique for people with non PostScript printers or printers with little memory.

To Print A PDF As An Image

Acrobat 6-9

1. Choose **File > Print** (**Command P** or **Ctrl P**)
2. Click **Advanced**
3. Select **Print As Image**
4. Click **OK** to close the Advanced Print Setup dialog box
5. Finally click **Print**

Type Fundamentals

Today the term Font refers to the electronic file that is loaded on a computer and Typeface is the name you choose from the Font menu. Additionally, there are more terms Acrobat professionals should familiarize themselves with when discussing type. Acrobat will **generically substitute** either a **Serif** or **Sans-Serif** typeface when the font **has not been embedded properly**.

Serif

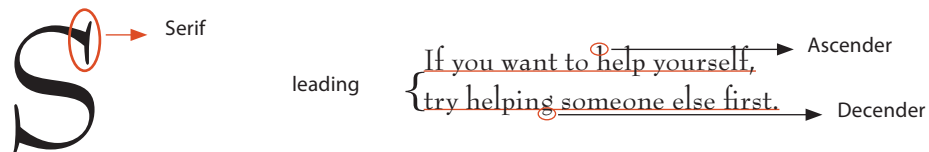
The two most common Serif fonts are Times New Roman or Times.

Sans-Serif

The two most popular Sans-Serif fonts are Arial and Helvetica.

Anatomy of Type

The fancy part of the character is called a serif:



The red line under the type is the baseline. Type used to be set with lead, in the traditional days they would have 12 point type with a 2 point thick piece of lead in between each line. The term leading grew from that, but today we have 12 point type with 14 points of leading (*the height of the type counts in the leading value*).

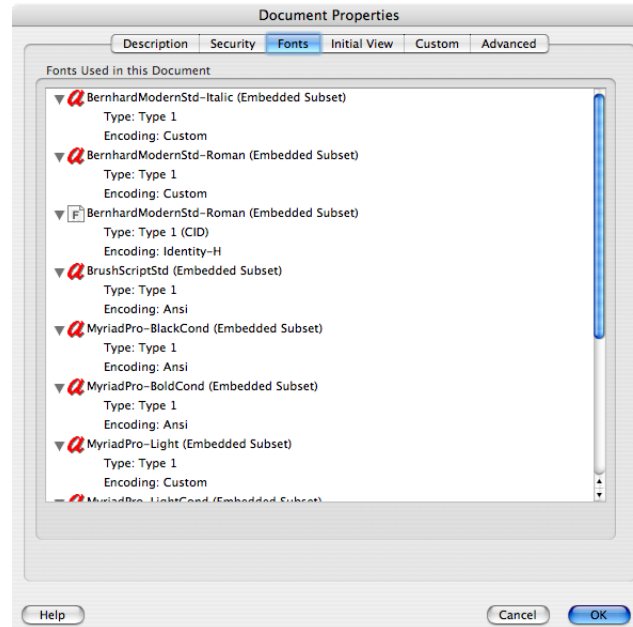
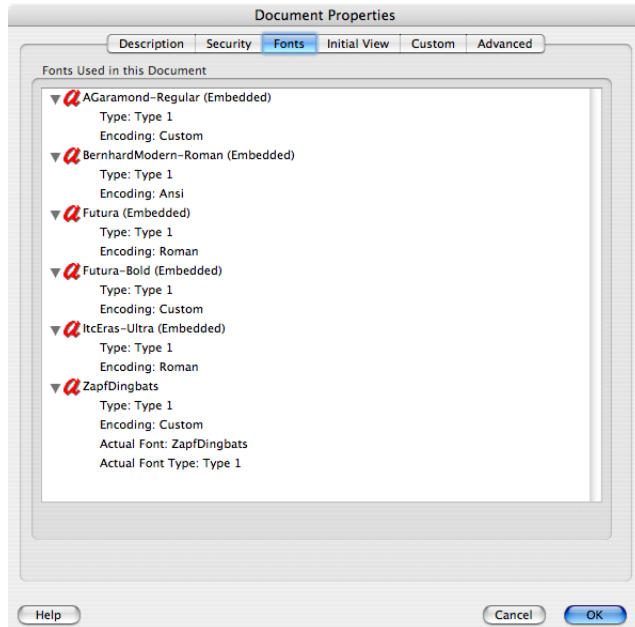
Font Embed Status

The advantage of a PDF is that you can control the font that is used, so you don't have to use Arial or Times, but if that is a company standard, no problem. Once a PDF has been created, it is important to check that the fonts made it into the document, fully. To do this, open the PDF and choose **File > Properties (Command D or Ctrl D)** then click the Fonts section at the top. Ideally it should say **(Embedded Subset)** or for high-end print **(Embedded)** next to every font in the list. In many cases, because of licensing restrictions, TrueType fonts may not fully embed (*more often on a Windows machine than a Macintosh™*). If you don't see either. The font didn't make it in. The Standard settings from Adobe don't embed **ANY Microsoft Fonts**.

You can use the PDF settings on my iDisk public folder, the **Proof_UnFlattened.joboptions** are a good one to start with. Download the file and double click to load (*it will launch Distiller and put the file in the proper place*). You might have to click Save As, then OK if you are on a PC (*don't change the location where it is saving*).

<http://public.me.com/kmccathran>

Font Status



Font Substitution

In some cases, fonts may not be able to be embedded because of licensing restrictions. In this case, the person receiving the PDF will need to have the font installed on their machine for it to display properly. The text below can only be viewed on a PC with the TrueType Font loaded. The Mac and Unix users are out of luck, it is simply not available. Here is the example:

American Dream PDF on a Machine with the Font Loaded

NEW TEXT


Same PDF file on a Macintosh™

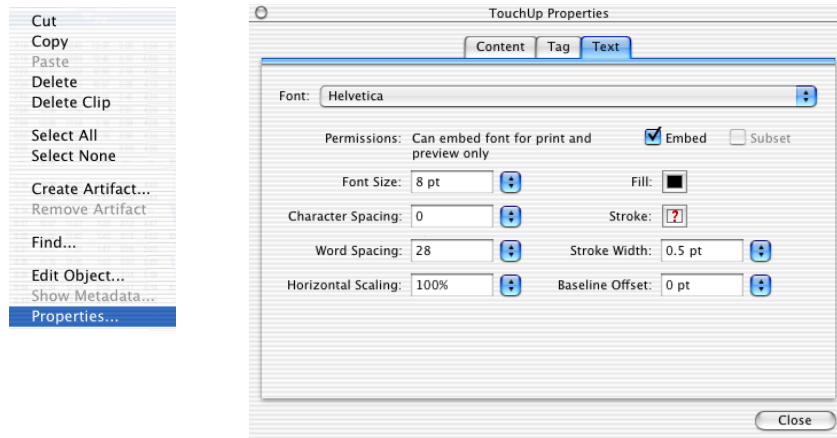
New Text

When a font is not fully embedded or subset, Acrobat or Adobe Reader will substitute **Adobe Sans MM** or **Adobe Serif MM**. They are loaded from a resource folder inside Acrobat and will not show up as a selection in any other application.

Font Attributes

To see the font that is used in a PDF:

1. Go to the **Touch up Text tool** 
2. Click in the text
3. **Right click** or **Ctrl Click** in the text area and choose **Properties...**



If a font was not embedded properly, Embed can be checked from the **TouchUp Properties dialog** and the document can be re-saved.

Acrobat Distiller

The Acrobat® Distiller® application is a PostScript language interpreter that converts PostScript (*files printed to disk with a PostScript driver*) into PDF files.

Acrobat ships with new groups of **PDF Settings** (*formerly called Job Options*) which control how a PDF is created. In all versions of Acrobat, there are potential flaws (*depending on the intended use of your final document*) in the default settings.

Preset Adobe PDF Settings

There are 6 sets of predefined Adobe PDF Settings available to the user. Each Distiller settings file controls compression, font embedding, color management and PDF/X-compliance as well as other settings for all PDF files that Distiller creates.

Standard

The Standard set is the default. It is designed to create PDF files for common office printing. This is the default set for all versions of Acrobat and it should **NEVER** be used. It **doesn't embed** any **Microsoft fonts**, it **changes the color** and may make your images low resolution. This set was designed for on-screen and low-end office printing.

High Quality

This set is designed for devices that may have higher resolution capabilities than the standard office devices.

Press Quality

This set is built for high quality pre-press devices such as an imagesetters or platesetters.

Smallest File Size

This set is designed for Web-based PDFs.

PDF/X-1a

PDF/X-1a is a standard developed in 2001 which ensures that the file is Acrobat 4 compatible and only CMYK or Spot colors are included.

PDF/X-3

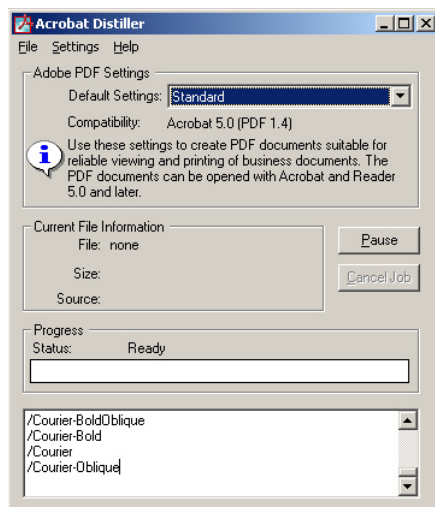
This format was developed in 2002 and allows for the same Acrobat 4 compatibility, CMYK and Spot colors, but it also supports RGB color space for clients using color management. This set is rarely used.

Note: Users should not modify any of the predefined Adobe PDF settings files. However, users can start with these settings and create new ones based on the selected set, with a unique and identifiable name.

General

The first major change is that Acrobat sets the **default compatibility** for all generated PDFs to **Acrobat 5 (PDF 1.4)**. The two other areas that need to be fixed are the **Fonts** and **Color** settings, we will talk about these in the upcoming pages. To customize your settings:

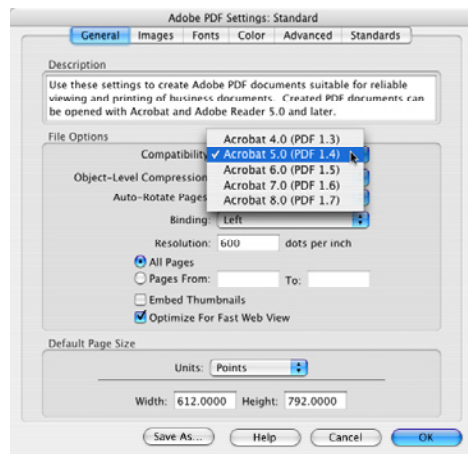
1. **Launch Acrobat**
2. Choose **Advanced > Acrobat Distiller**
3. Once Distiller launches, the window will show the default Settings which are called Standard
4. To customize these settings choose **Settings > Edit Adobe PDF Settings** (*Ctrl E* or **Command E**)



Editing the General Settings

In the General tab, PDF authors can select version Compatibility with Acrobat 3 – 8 The current recommended setting is **Acrobat 4 (PDF 1.3)** for most print shops and Acrobat 5 if the printer is accepting responsibility for Transparency Flattening. Most print shops and high-end production workflows are still based on Acrobat 4. Additionally, web users viewing PDF links or email attachments, may not upgrade their software very often, this will ensure that most of the population can read the PDF that is being created.

- You can only get Un-flattened Transparency if you Export from InDesign or choose File > Save As from Illustrator
- Any PDF Created from a PostScript file or Printed to the PDF Printer has the Transparency already flattened in the print stream



Auto-Rotate Pages will rotate pages based on DSC (*Document Structuring Convention*) comments in the PostScript file (if *Process DSC Comments* is selected in the *Advanced* tab of *Adobe PDF Settings*). A document may contain pages that require switching orientation in order to be readable (*tables or spreadsheets are a good example*).

- **Individually** will rotate each page based on the direction of the majority of text on every individual page in the document.
- **Collectively by File** will rotate all pages in the document based on the orientation of the majority of text for the entire document.

General Continued

The **Resolution** setting in this dialog has nothing to do with image resolution. It refers to the hardware output resolution. If your laser printer can do 600 dpi (*dots per inch, sometimes called spi, spots per inch*) it will. Some devices are capable of switching to multiple hardware resolutions, this setting will determine which one is used by the output device. This setting also determines the number of color steps in a blend, a higher number will produce more shades of gray, if the device is capable of printing it.

Embed Thumbnails stores color previews in the Thumbnails panel. However; Acrobat 5 and newer automatically Generates Thumbnails when a document is opened. Prior versions must have the thumbnails generated when the file is distilled or created after the fact and stored inside the PDF document. Having this checked will increase the file size. Therefore, it is not recommended for Web-based PDF files.

Optimize for fast web view reduces the PDF file size and restructures the file to prepare for page-at-a-time downloading (*byte serving*). This means that a user can view page 1 in a 10 page document while 2 - 10 are still being downloaded. This option also compresses text and line art regardless of what is selected in the Compression settings.

Compression Settings

Web or On-screen

Web based PDFs need the **smallest possible file size**. Most monitors can not display a resolution above **72 ppi**, therefore **color** and **grayscale** should be set to **72**. **Line Art** (*Monochrome or Bitmap images with no shades of gray*) is typically acceptable at **300 ppi**. For Image quality in color and grayscale images, a setting of **High** or **Maximum** is recommended for **print users**, but **Medium** or **Low** for the **web users**.

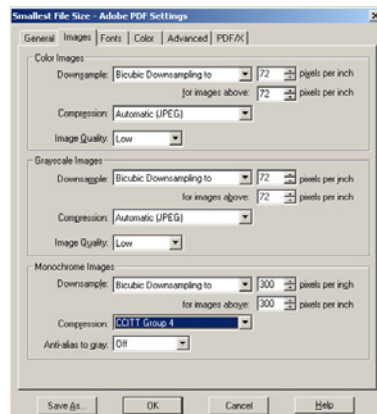
Office

Laser, Inkjet and most Print on Demand devices do not need 300 ppi for image resolution, it is overkill. A resolution of **150 - 225 ppi** (*pixels per inch*) is sufficient for **color** or **grayscale** photos. **Line Art** is typically acceptable between **300 - 450 ppi**.

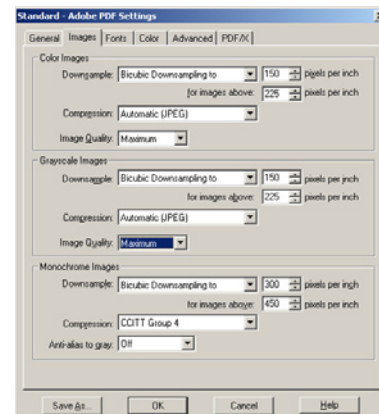
Press

For high end printing, the rule of thumb is **2 x lpi** (*lines per inch, or halftone screen*) is the best resolution for **color** and **grayscale**, typically **600 - 1200 ppi** is recommended for **Line Art**, always check with your print shop for recommended settings.

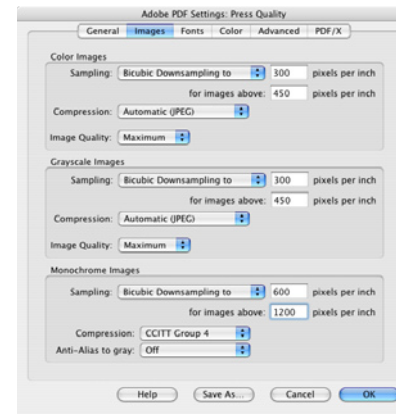
Web Settings



Office Printing



Press Printing

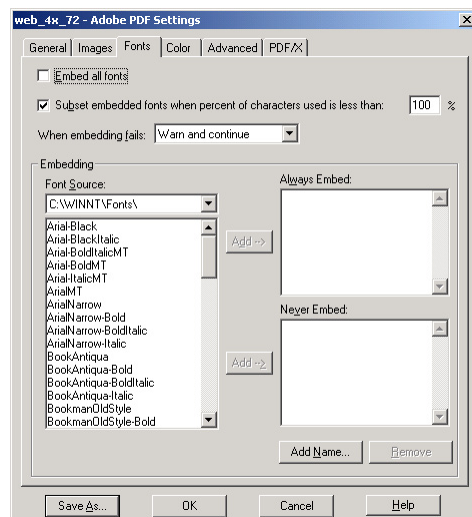


Font Settings

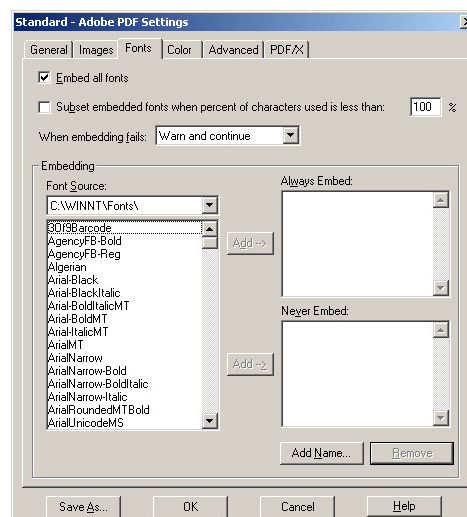
This is one of the biggest changes that should be made to the default PDF Settings. It is always safer to **fully Embed** the fonts used in a document for high-end print, but Embedded Subset is perfect for all other uses. There are three choices: **Embed** or **Embed a Subset** or **Subset**. Subsetting, only writes in the characters used in a document. This may make it difficult to make last minute type corrections or print predictably when crossing platforms. Therefore, any PDF files that may be printed should have **Subset unchecked** and **Embed checked**.

Subset % refers to the maximum percentage of characters (*glyphs*) in a font that can be used before the entire font is Embedded instead of Subset. The range is 1 through 100. For example, a value of 50 means that a font will be **Embedded in Full** (*not subset*) if more than 50% of characters are used; a value of 100 means all fonts will be Subset no matter how many characters are used (*because more than 100% of characters can't be used*). For Web based PDFs, embedding all the fonts causes the file to become too large, therefore Subset at 100% is recommended. This means that Distiller will Subset all fonts (*write in the unique characters used*) and not fully Embed all characters in the font. This will keep the file size down.

Web Settings



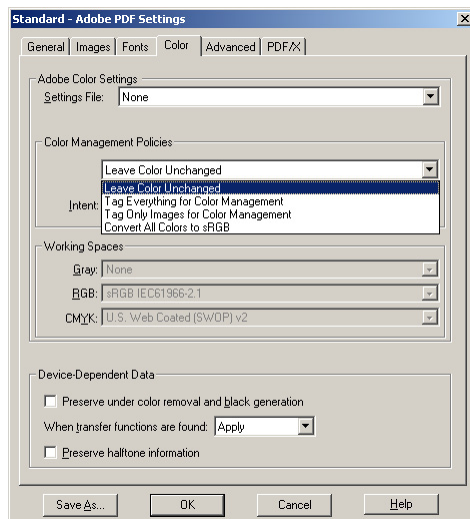
Print/Press Settings



*Note: The **Never Embed** list should always remain empty, especially if this document is intended for print use.*

Color Settings

One of the biggest complaints about PDF files is that the color changes when printed from the PDF vs directly from the application. This can be prevented by changing the Color tab to **Leave Color Unchanged** for all sets.



Tags allow the color profile to be specified at the output device, either for images only or the entire document.

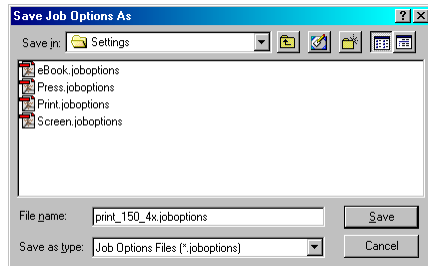
sRGB is an **ICC Profile** (*International Color Consortium*) that is used for converting device-dependent or device-independent color spaces.

When transfer functions are found Preserve determines how Distiller handles transfer functions, which are traditionally used to compensate for dot gain or dot loss when an image is transferred to film. Preserve will pass into the PDF file the transfer functions. Remove will cause Distiller to ignore transfer functions. Apply will use the transfer function to modify the data it writes to the PDF.

Preserve Halftone Information will apply specific halftone settings stored in the PostScript file such as frequency, angle and spot function.

Saving Job Options

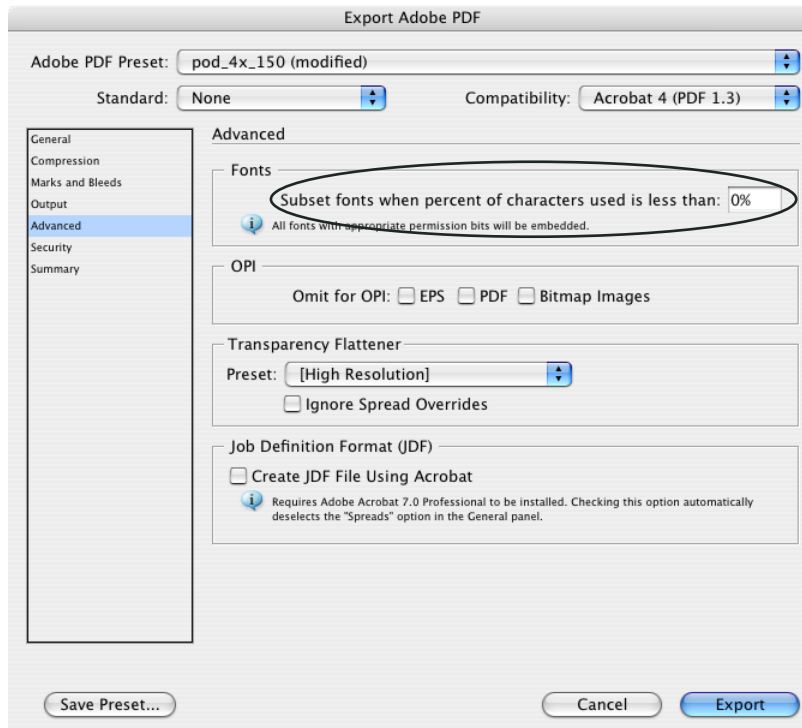
Once the Job Options have been customized, they can be saved for future use. It is typically recommended that the set is named in such a way that it is easily identifiable. For example, this set is named **print_150_4x.joboptions**, to indicate that it is designed for office printing, with a resolution of 150 ppi and it will be Acrobat 4 compatible.



*Note: The settings must be placed in the proper folder for them to be available to Acrobat Distiller and the Adobe PDF Printer. **Do not change the default location.** Once these settings are created they may be loaded on many computers, so that all users have consistent PDF settings.*

Advanced

InDesign has an **RGB to CMYK conversion engine built in**, so in the Advanced section of you select CMYK all RGB images will be converted to CMYK in the final PDF file.



Subset % refers to the maximum percentage of characters (*glyphs*) in a font that can be used before the entire font is Embedded instead of Subset. The range is 1 through 100. For example, a value of 50 means that a font will be embedded in full (*not subset*) if more than 50% of characters are used; a value of 100 means all fonts will be subset no matter how many characters are used (*because more than 100% of characters can't be used*). For **Web based PDFs**, embedding all the fonts causes the file to become too large, therefore **Subset at 100%** is recommended. This means that InDesign will Subset all fonts (*write in the unique characters used*) and not fully Embed all characters in the font. This will keep the file size down.

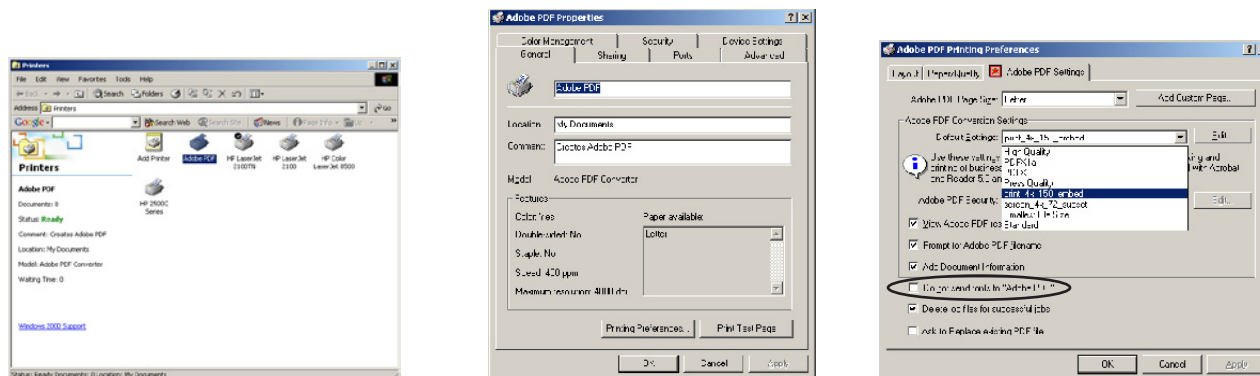
The value for **Subset** should be **0%** to ensure that all fonts are **fully embedded**, not Subset. This means Subset 0% of the time.

Transparency Flattening also occurs here, **High Resolution** is recommended for all non web-based PDFs. If Acrobat 5, 6 or 7 is selected in general this option will not be available.

Print Driver Settings

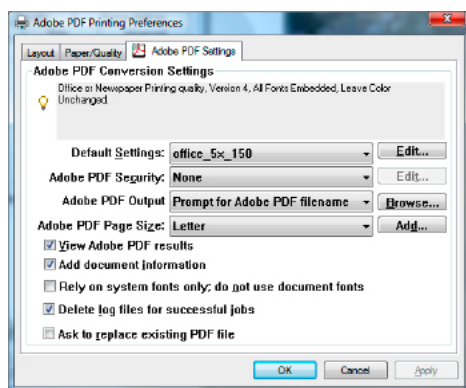
After saving a customized set, it is important to change the print driver on the PC to use this set as the default. To do this go to **Start > Settings > Printers**. Now, **Right-click** on **Adobe PDF** and choose **Properties**. It is also important to **de-select** the box that says **do not send fonts to Adobe PDF**. Distiller needs the fonts to ensure that type reflow does not occur.

Note: The location of the PDF settings may vary, depending on the version of Windows.



Vista Printer Settings

Vista has a different check box than other versions of Windows, be sure to **uncheck** Rely on system fonts only do not use document fonts.



PDFMaker for Microsoft Office

PDFMaker is a PC based macro for users of Microsoft™ Word 97, Word 2000, PowerPoint 97, PowerPoint 2000, Excel 97, and Excel 2000 using Acrobat® Distiller®. When Acrobat® is installed on a machine that contains Office it will create a new button on the toolbar for one click access to Create a PDF, from any office application. PDF Maker provides some special features such as automatic Bookmarks, Hyperlinks, Comments and Accessibility, just to name a few. The button can either be clicked or users can select **Adobe PDF> Convert to Adobe PDF** or **Adobe PDF > Convert to Adobe PDF and eMail**.

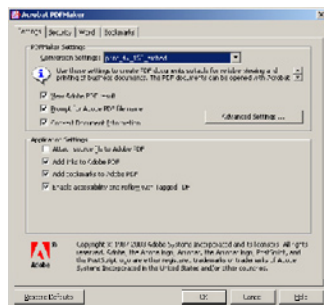
When creating PDF files from programs such as Word, it is important to keep in mind the intended use for the resulting PDF. For example, will this document be viewed on-screen only, printed on an office laser printer or sent to a printing press?

With PDFMaker users can create a tagged PDF, which enables the extraction of text and graphics. For example, the text in a PDF can be saved out as RTF (Rich Text Format) and brought back into Word for editing. The creation of Hyperlinks is also improved for Word 2000.

Conversion Settings

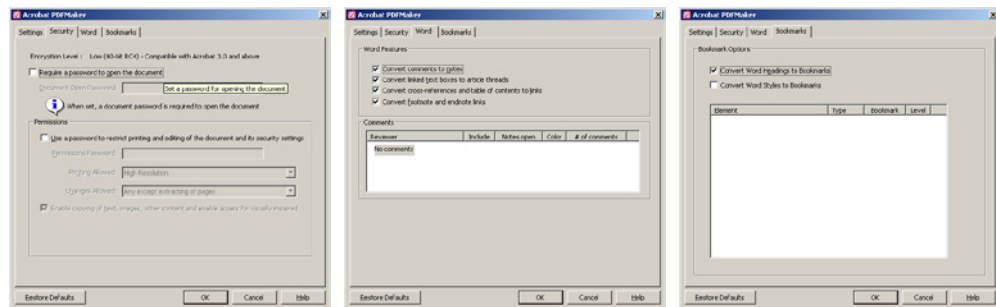
In addition to setting the default Job Options in the print driver, users can select the set to be used from within Office. To do this, go to **Adobe PDF > Change Conversion Settings**. Now choose the newly created Job Options set. Once this is changed, all Office applications will use this set.

Note: Most users don't notice the new Adobe PDF menu, located next to the Help menu in Office.



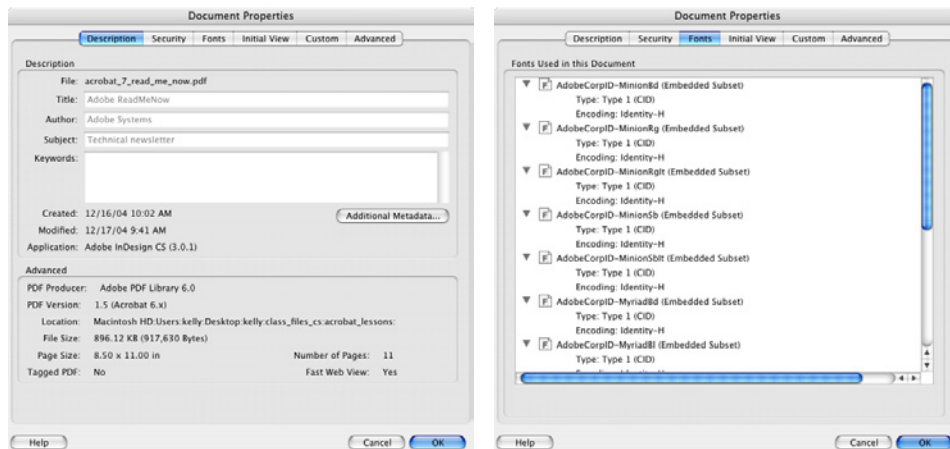
Additional Microsoft Office Conversion Settings

There are other settings that can be customized here as well. For example, if **Custom Styles** are used in Word, those can automatically be converted into **Bookmarks**.



Checking Your PDF

Once you have created your own PDF it is important to verify that the file produced was created with the proper settings. Open your PDF file and choose **File > Document Properties (Command D or Ctrl D)**. The two most important areas to check are **PDF version & Font Embed Status**.



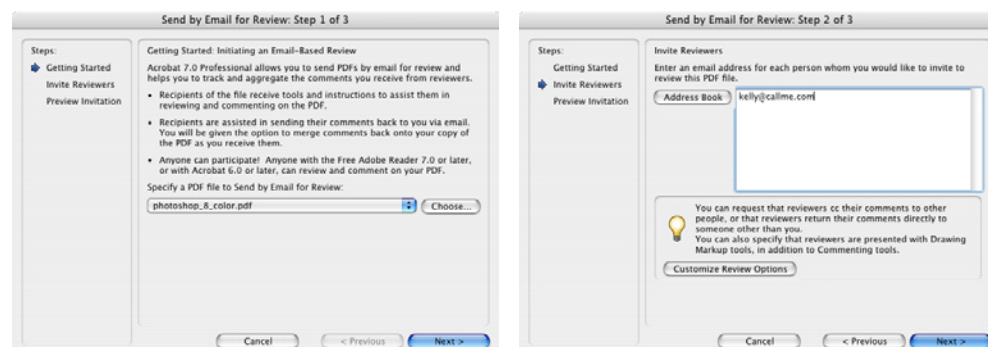
Comment with Free Reader

The owners of **Acrobat 7, 8 or 9 Standard or Professional** can **enable** the **Commenting tools** for anyone with the **Free Adobe Reader 7, 8 or 9** (*the only requirement is that they have version 7, 8, or 9 not a previous version*). Before you start, be sure Acrobat is connected to your default email program.

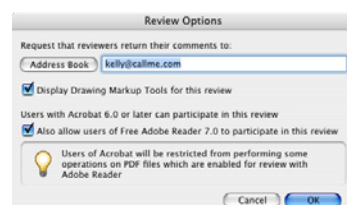
1. To start this process, on the toolbar at the top click **Send for Review**, then choose **Send by Email for Review**.



2. The file will be re-saved as Acrobat 7 or 8 if it was created as an earlier version such as Acrobat 4 (*PDF 1.3*), which most print shops prefer to receive. **Click Next**.



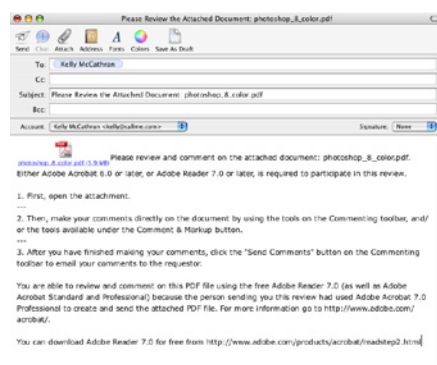
3. In the next window click the button that says **Customize Review Options**. Check the box that says **Display Drawing Markup Tools for this review**, this will turn on an extra toolbar for Commenting.



4. Now click **Send Invitation**, this will launch your default mail program and attach the PDF for review.



5. Once the program is launched, Acrobat will have written all this copy for the email and even included the location to download the latest Adobe Reader. **Click Send.**



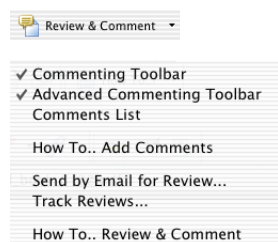
6. When the reviewer receives the file, they open in the **Free Reader** the commenting toolbar will automatically open.



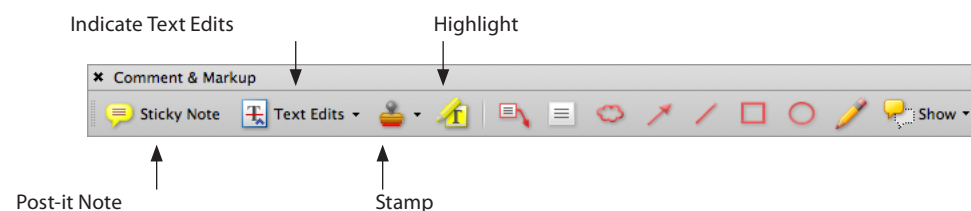
7. Once the comments are made, the reviewer simply has to hit the **Send Comments button** to get the notes back to the author of the document.

Commenting

Acrobat 8 & 9 have significantly improved their commenting features (*formerly called Annotations*). To view the Commenting toolbar, click on the Review & Comment Task Button and select Commenting Toolbar.



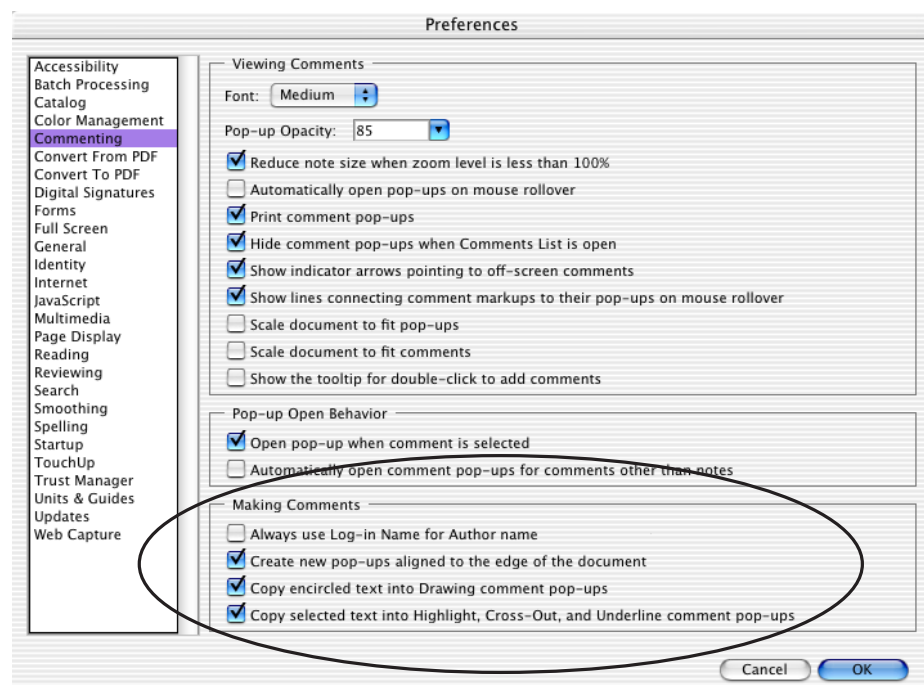
Commenting Toolbar



Note: Comments are the most frequently used, they look like electronic Post-it™ notes. However, there is another commenting tool that may be easier for the reviewer. That tool is the Text Box tool on the Advanced Commenting toolbar. To access this tool click on the Review & Comment Task Button and select Advanced Commenting Toolbar.

Commenting Preferences

There are a few options that should be changed in the Commenting Preferences.



Always use Log-in Name for Author name should be unchecked if the IT staff used a generic name for the installation, instead of your name.

Create new pop-ups aligned to the edge of the document is a nice option and is on by default.

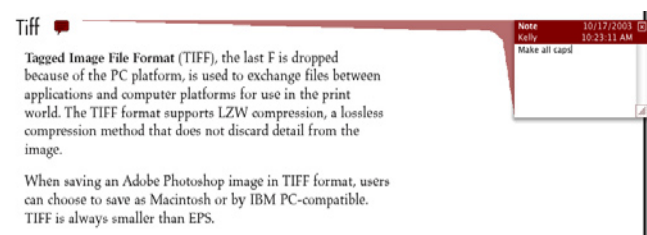
Copy encircled text into Drawing comment pop-ups, will automatically put the text that is surrounded by a comment tool, such as Rectangle or Cloud into the note.

Copy selected text into Highlight, Cross-Out, and Underline pop-ups will make Acrobat 7, 8 & 9 behave more like Acrobat 5. This will allow the Highlighted, Underlined or Crossed out text to be exported to a summary or saved as a Word doc.

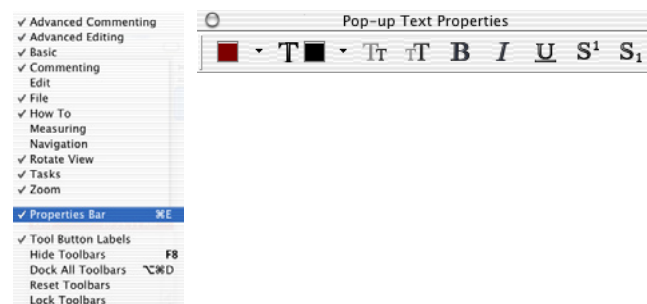
Creating a Note

The Note tool will add notes to any page in the document. They can be positioned anywhere on the page, by default they are created as pop-up windows on the edge of the document. Bold, italic and other attributes can be specified for the pop-up window. The text also text scrolls for long notes.

1. Select the **Note** tool
2. Click where you want the note, or click and drag to create a custom-sized note window
3. Add the note text
4. Once the note is finished, it can be closed or left open



*Tip: To keep the note tool active, select the Keep Tool Selected option in the **Properties** toolbar. To quickly get to the Properties toolbar, Right click or Control click the toolbar area at the top of the screen, then choose Properties Bar. You must be on the Note tool for this option to appear.*



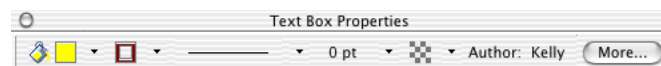
Advanced Commenting Toolbar

Text box comments are some of the most useful types of notes and they are closer to the traditional pen & paper method. The text box comment is visible on the page and doesn't have to be opened like the post-it note. Once the note is finished Properties can be set:



1. Choose **Review & Comment > Advanced Commenting toolbar**.
2. Select the **Text Box** tool.
3. Click once or drag a rectangle to create the note.

*Note: The **Properties toolbar** will allow you to change the color, alignment, and typeface of the note **View > Toolbars > Properties Bar** (**Ctrl E** or **Command E**).*



4. Click outside the note, to leave text mode.

Note: Acrobat 7 and 8 don't leave the note tool active, when a note is finished it will revert back to the Hand tool. Acrobat 9 leaves your current note tool selected when you add a comment.

To Delete a Note

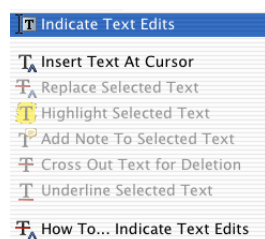
1. Select the Hand tool or the Note tool.
2. Select the note icon, then press Delete or **Right click** or **Control click** the note icon (or the title bar of the pop-up window), then choose **Delete**.

*Note: You can also **Right click** or **Control click** the text area of the pop-up window, and then choose Delete Comment.*

Indicating Text Edits

Acrobat 7 and 8 has added new features called **Markups**, to indicate where text changes or deletions should occur. A caret indicates text is to be inserted and the actual text will appear in a pop-up window. Text can also be highlighted or underlined after it is selected with the Indicate Text Edits tool.

Comment text can be exported directly to a Word 2002 document. That means if the document originated in Word, a user can send a PDF to a group of Reviewers, they can mark it up and send the comments back to the Author. Finally, the author can export the comments back to the original Word doc. The author just needs to be sure that the insertion comment is the exact text, including spaces and returns, that they want added.



Markup Instructions

1. Click the Indicate Text Edits tool
2. With the cursor in the text, simply start typing and a pop-up window will appear adding your text

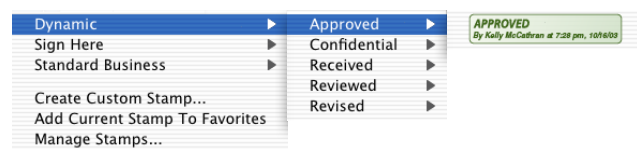
Markup Tips

- To indicate that a space should be added simply press the spacebar, then close the pop-up window.
- **Right click** or **Control click** selected text, then choose **Replace Text**.
- To indicate that a new paragraph should be added, press **Enter** or **Return**, then close the pop-up window without adding text.
- Text edits can also be indicated using the Select Text tool, then choosing Insert Text At Cursor from the Text Edits menu on the Commenting toolbar.
- For text to be deleted, on the Commenting toolbar click Text Edits. Select the text, then press Backspace or Delete.
- Choose **Text Edits > Highlight Selected Text** or **Underline Selected Text** on the Commenting toolbar. Then **Ctrl** drag or **Option** drag to mark up a rectangular area of text. This is especially useful to mark up text in a column.

Note: Notes added to cross-out markups will not be exported into Word.

Adding Stamps

The Stamp tool has many enhancements in Acrobat 7 and 8. Users can now choose from a list of predefined stamps and it is easier to create your own custom stamps. Adobe has added Dynamic stamps which grab information from your system and from the Identity panel of the Preferences dialog box. This information includes name, date, and time which appears right on the stamp.

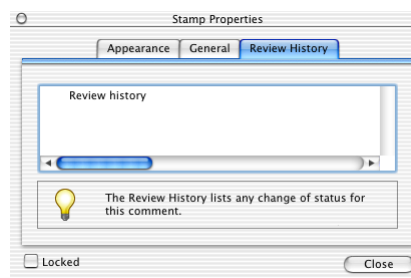
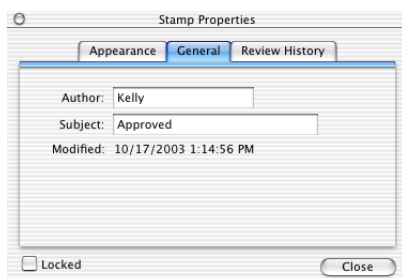
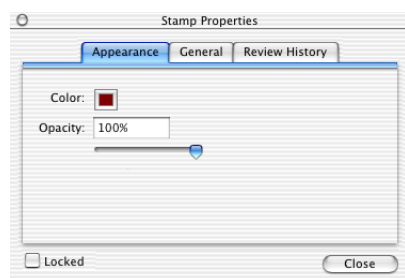
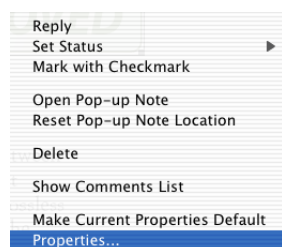


1. On the Commenting toolbar, select the stamp to add.
2. Click the page where you want to place the stamp (*this builds one at its default size*).

Note: You can also drag a rectangle to define a custom size. To delete a stamp, Right click or Control click the stamp, then choose Delete. An easier method is to click the stamp and press Delete or Backspace.

Stamp Properties

To change a stamp's color or opacity, **Right click** or **Control click** the stamp, and choose **Properties**. The Appearance tab contains these settings.



Creating Custom Stamps

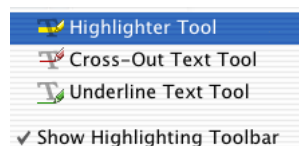
Creating Custom Stamps from PDF files is far easier than in previous versions. Acrobat now supports common graphic formats such as Adobe Illustrator (.ai), Adobe Photoshop (.psd), Joint Photographic Experts Group (.jpg), Graphics Interchange Format (.gif), and Bitmap (.bmp). It does continue to support PDF for custom stamps. Custom stamps can be added to an existing stamp category, or users can create a new categories.

Note: To remove the stamp from the menu, **Select the stamp, then choose Remove Current Stamp from Favorites.**

Highlight, Cross-Out and Underline

The **Highlighter** tool is very powerful. Here is an example: You may have a long PDF document that you are reading and certain sections may be important to note or markup. Use the Highlighter tool to mark the sections that you would like to save and they will become exportable to a Comment Summary.

The **Cross-Out Text** tool is helpful for indicating text that should be deleted from a file you are reviewing and the **Underline Text** tool can be used like the Highlighter tool.



1. On the **Commenting toolbar**, select the **Highlighter** tool (or *Cross-Out* or the *Underline* tool).
2. Click and drag over the text to be marked or **Ctrl** or **Option** drag to mark up a rectangular area. This works well for PDF documents that have multiple columns.
3. **Double click** the **text** to add a note.

Note: If **Copy selected text into pop-ups** has been selected in the **Commenting preferences**, the highlighted text will automatically be in the pop-up.

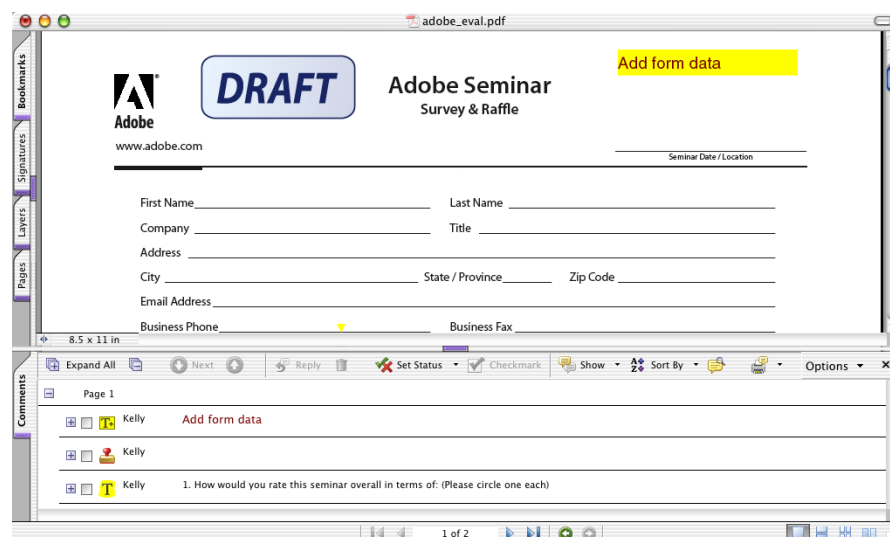
Deleting a Highlight, Cross-Out or Underline

Right click or **Control click** the markup and choose **Delete** or select the **Hand tool**, **click** the **markup**, and then press **Delete**.

Note: If multiple markups are placed on top of one another, you may need to delete several comments

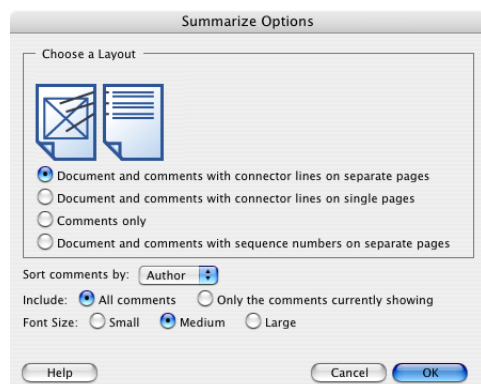
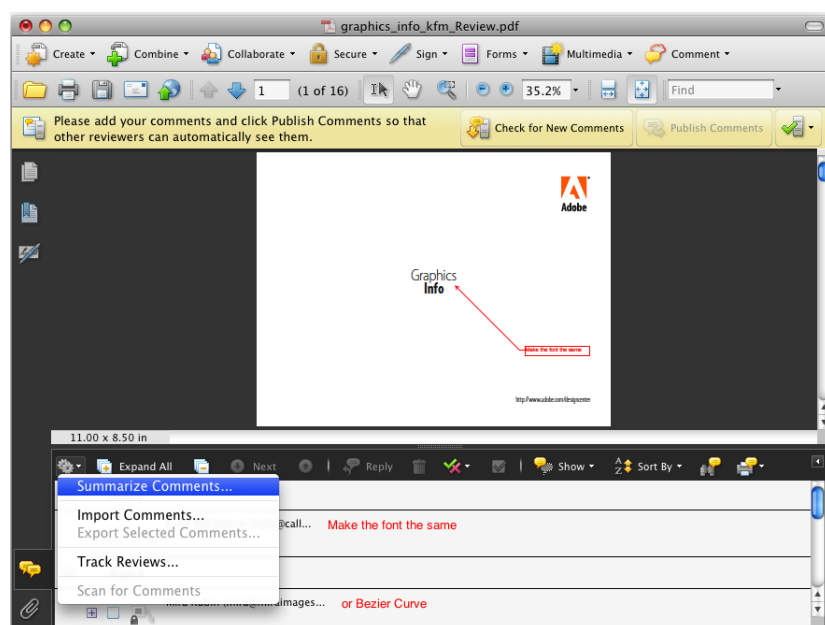
Exporting Comments

Once comments have been added to a document, they can be exported or summarized through the **Comments Navigation Tab (View > Navigation Tabs > Comments)** or click on the Comments tab at the lower right corner of the document window.

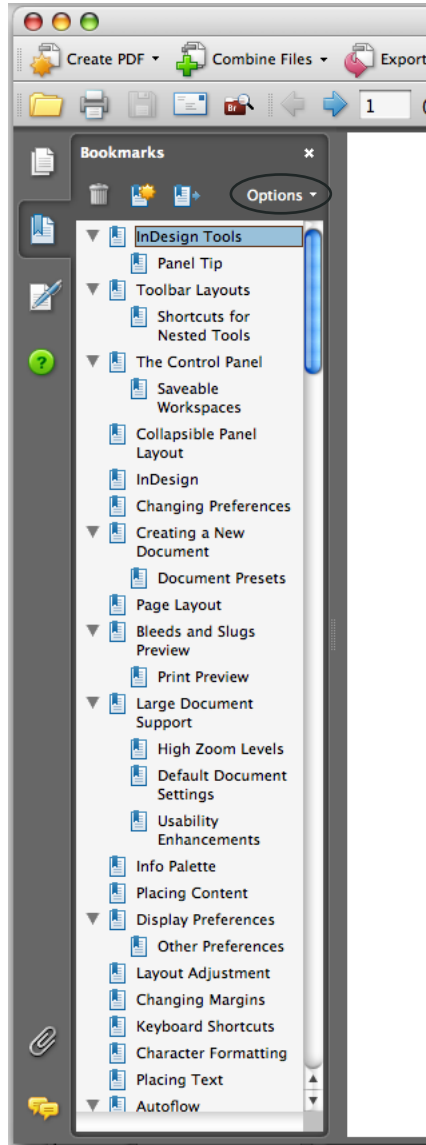


Summarizing Comments

To create a separate document with all of the comments and the author choose **Options** from the **Comments Navigation Tab** and choose **Summarize Comments**.



Bookmarks



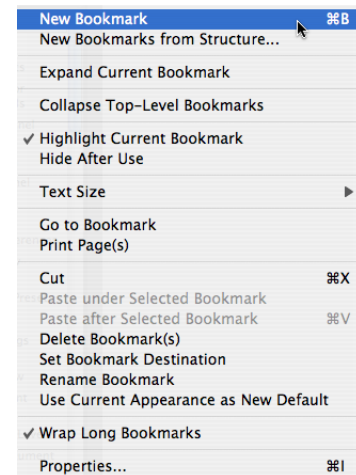
Bookmarks allow users to jump to a different spot within a PDF document, to another document (PDF or non-PDF), or to a Web page. Bookmarks appear in the Navigation pane, which can be brought up in several ways. Click the Show or Hide Navigation pane button on the toolbar or click the Bookmarks tab on the left side of the document window.

Bookmarks can also perform actions, such as playing a movie or sound, executing a menu item, or submitting a form.

Creating Bookmarks

To add a bookmark:

1. Click the **Bookmarks** tab in the navigation pane
(on the left side of your screen).
2. **Highlight** the text to be used for the Bookmark with the **Text Select tool**.
3. Click the **New Bookmark** button at the top of the Bookmarks pane (**Ctrl B** or **Command B**) or choose it from the **Options** menu on the Bookmarks Panel.



Recognize Text Using OCR

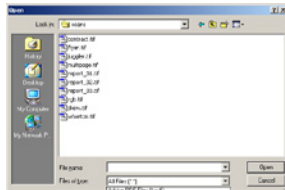
To search, correct, and copy the text in a scanned Adobe PDF file, users can run Paper Capture in one of three file formats: Adobe PDF Formatted Text and Graphics, PDF Searchable Image (Exact), and Searchable Image (Compact). All formats apply optical character recognition (OCR) and font and page recognition to the text images and convert them to normal text. The searchable image file types have a bitmap image of the pages in the foreground and the captured text on an invisible layer beneath.

Resolution Guidelines

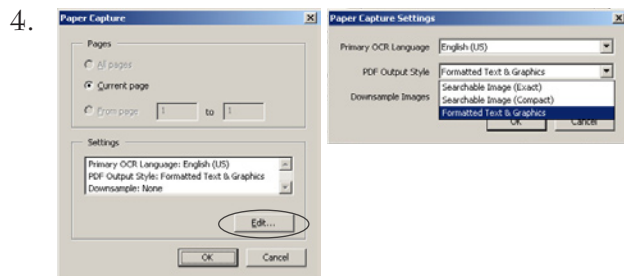
- Black-and-white images at 200 to 600 dpi (*300 dpi is generally optimal*).
- Grayscale or color images at 200 to 400 dpi.

To convert scanned pages to searchable text:

1. **Open** the file you want to capture.
2. If the file you want doesn't show, go to **Show** and choose **All Files**.



3. **Document > OCR Text Recognition > Recognize Text Using OCR.**



Under **Settings**, click the **Edit** button if you want to change the primary **Optical Character Recognition (OCR)** language, the PDF output style, or the image downsampling.

For **PDF Output Style**, the default is **Searchable Image (Exact)** to keep the original image in the foreground and place searchable text behind the image. This should be **changed** to **Formatted Text and Graphics** to reconstruct the original page using recognized text, fonts, pictures, and other graphic elements.

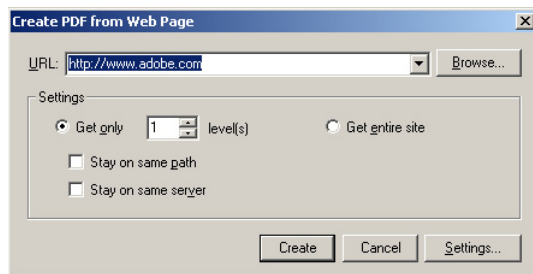
5. In the Paper Capture dialog box, click **OK** to start the conversion.
7. Choose **Document > OCR Text Recognition > Find First OCR Suspect**. The suspect text and the original bitmap image are shown in the Find Element window.
6. Choose **Document > OCR Text Recognition > Find All OCR Suspects**. All suspect words on the page are enclosed in boxes. Click any suspect word to show the suspect text and its original bitmap image in the Find Element window.

Correcting Captured Pages

Correcting words on captured pages, if choose the PDF **Formatted Text and Graphics** format as the PDF Output Style, Acrobat “reads” bitmaps of text and tries to substitute words and characters for the bitmaps. When it isn’t certain of one of its substitutions, it marks the word as a Capture Suspect. Suspects are shown in the PDF as the original bitmap of the word, but the text is included on an invisible layer behind the bitmap of the word. This makes the word searchable even though it is displayed as a bitmap. You can accept these suspects as they are, or you can use the TouchUp Text tool to correct them. Note: You must have converted your scanned page to formatted text and graphics before you can correct suspect words. To review and correct suspect words on captured pages:

Web Capture

Have you ever had a document that won’t print properly from a web browser? With Acrobat’s Create PDF from Web Page, most HTML documents can be converted into an 8.5 x 11 printable layout, even sites that use **Frames**. To try this Choose **File> Create PDF > From Web Page**.



Note: This is also an excellent way to permanently archive information from the internet.

Cropping Pages


Pages can be cropped in several different ways. The first is **Document > Crop Pages**. In the pop-up menu in the upper left corner, leave CropBox selected, and then adjust values for the Margins: Top, Bottom, Left, and Right. A black rectangle will display the adjusted boundaries of the cropped page.

The second method is through the **Crop tool**. **View > Toolbars > Advanced Editing** then click the Crop Tool. Drag a rectangle over the area you'd like to keep. Double-click inside the cropping area to perform the crop.



Editing Images

To edit an image:

1. Go to the **TouchUp Object** tool 
(This may be located under the TouchUp text tool)

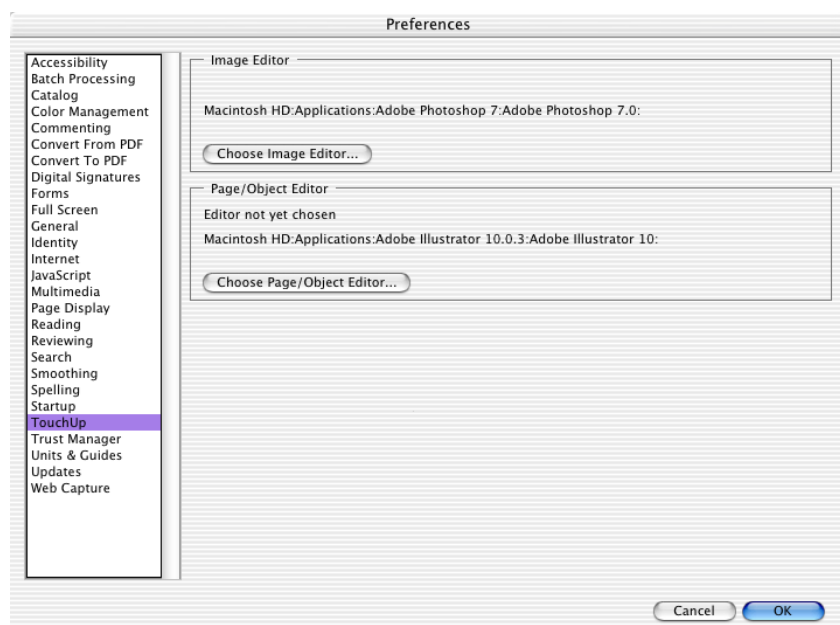
2. **Right click** or **Ctrl Click** on the image and choose **Edit Image...**

This will launch Photoshop and open the image as a temp file. Changes made to the image can be saved into the Acrobat document through **File > Save**.

Note: A **Save As** will extract the image at actual resolution from the PDF.

TouchUp Preferences

If your machine produces an error when you attempt to use the TouchUp Object tool, you may need to specify an image or page editor. The two recommended applications are Photoshop for images and Illustrator for the page.



Note: You may select a image editing application other than Photoshop from **Edit > Preferences** on Windows or **Acrobat > Preferences** on Mac OS 10. Then click the TouchUp section on the left side of the Window.

PDF Optimizer

The PDF Optimizer feature **Advanced > PDF Optimizer** was intended to reduce the file size of a PDF document. It allows such things as removing embedded fonts, compressing images, and removing elements from the file that are no longer needed. More often, we recommend that this is run in order to lower the version of the PDF file to make it more compatible.

Note: When a digitally signed document is Optimized, it invalidates the signature.

Auditing the Space Usage

Before optimizing, it is helpful to run a **Space Audit**. This provides a report of the total number of bytes used for specific document elements such as bookmarks, fonts, images, forms and comments. It also reports the total file size. Each element occupies a percentage of the total file size, this will help determine what parts of the PDF should be targeted to reduce the file size.

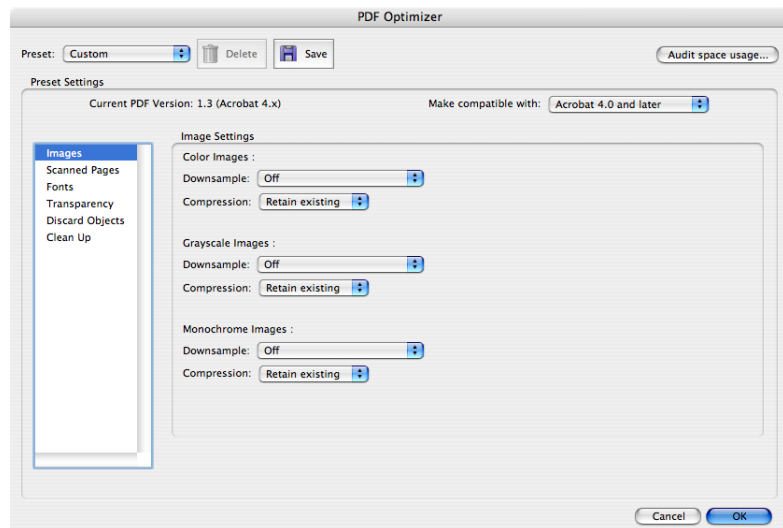
Space Audit		
Results		
Percentage	Bytes	Description
0 %	0	Thumbnails
98.15 %	8557633	Images
0 %	0	Bookmarks
0.20 %	17289	Content Streams
1.16 %	100717	Fonts
0.00 %	256	Structure Info
0 %	0	Acro Forms
0 %	0	Link Annotations
0 %	0	Comments
0 %	0	Named Destinations
0 %	0	Web Capture Information
0.07 %	5864	Document Overhead
0 %	0	Color Spaces
0 %	0	X Object Forms
0 %	0	Pattern Information
0 %	0	Shading Information
0.22 %	18807	Extended Graphics States
0 %	0	Piece Information
0.21 %	17959	Cross Reference Table
0.00 %	4	Unknown
100 %	8718529	Total

OK

1. Choose **Advanced > PDF Optimizer**.
2. Click the **Audit Space Usage** button at the top of the dialog box.

Note: The PDF Optimizer feature cannot flatten transparency. Transparency increases the documents file size. Transparency can only be flattened when building the original PDF document or when printing from Acrobat 6, 7, 8 & 9.

Optimizing a PDF File

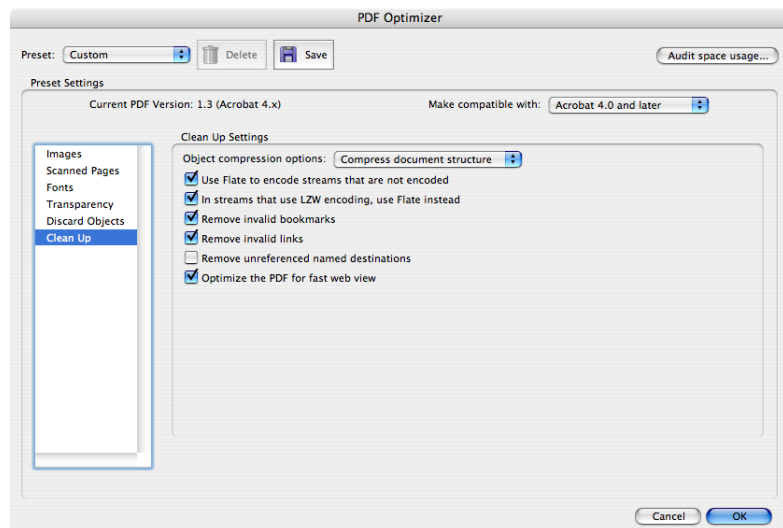


1. Choose **Advanced > PDF Optimizer**.
2. Select the version of Acrobat that the PDF will be compatible with from the Compatible With menu, Acrobat 4 is recommended for many high end print workflows.
3. Click the Images tab, select the resolution downsampling for color, grayscale and monochrome images. If you only want to change the version compatibility, uncheck all the boxes.

Removing Fonts

The PDF Optimizer also offers the ability to **unembed** (or *remove*) fonts stored in a document. The only scenario where this is useful feature is: You work for a company that uses the same core set of fonts and everyone who opens the PDF has the exact version of the required font loaded on their machine. In all other cases, where you have no control over the fonts on the receiver's machine, fonts should always remain embedded or subsetted in the PDF document.

Clean Up



Clean Up removes obsolete or unnecessary elements in the document. Be careful with Remove Document Structure, this enables screen reading programs to understand the order and elements to be read out loud to the visually impaired. This should not be checked, it prevents document accessibility. By default, only elements that do not affect functionality are checked. Therefore in most cases these settings are fine.

By default, the following options are checked:

- Use Flate (*Flate is a loss less compression encoding method*)
- In streams that use LZW encoding, use Flate instead
- Remove invalid bookmarks and links
- Remove unused named destinations
- Discard all alternate images
- Optimize the PDF for Fast Web View

PDF Portfolios

A PDF Portfolio contains multiple PDF documents assembled into a single PDF file. The PDF Portfolio can contain many different file formats, created by different applications.

You could combine all of these types of documents into a PDF Portfolio:

- Text documents
- Video
- eMail messages
- Spreadsheets
- CAD drawings
- PowerPoint presentations

The original files retain their individual identities and are assembled into one PDF Portfolio. Users can open, read, edit, and format each file independently of the other files in the PDF Portfolio.

To Create a PDF Portfolio

Create a PDF Portfolio by choosing the **File > Create PDF Portfolio**.

Note: In Windows, PDFMaker in Outlook and Lotus Notes can create PDF Portfolios when you convert email messages.

To add files to the PDF Portfolio choose **Modify > Add Files** in the PDF Portfolio toolbar. When you've completed your PDF Portfolio, you can share it through email or **Acrobat.com**, a free, secure web-based service. You can burn it to a CD or DVD, or distribute it as you would share any other PDF.