

Adobe® Acrobat® 8 PDF Bible

Ted Padova



Wiley Publishing, Inc.

Adobe® Acrobat® 8 PDF Bible

Adobe® Acrobat® 8 PDF Bible

Ted Padova



Wiley Publishing, Inc.

Adobe® Acrobat® 8 PDF Bible

Published by
Wiley Publishing, Inc.
10475 Crosspoint Boulevard
Indianapolis, IN 46256
www.wiley.com

Copyright © 2007 by Wiley Publishing, Inc., Indianapolis, Indiana

Published simultaneously in Canada

ISBN: 978-0-470-05051-4

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

1O/ST/QR/QX/IN

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Legal Department, Wiley Publishing, Inc., 10475 Crosspoint Blvd., Indianapolis, IN 46256, (317) 572-3447, fax (317) 572-4355, or online at <http://www.wiley.com/go/permissions>.

Limit of Liability/Disclaimer of Warranty: The publisher and the author make no representations or warranties with respect to the accuracy or completeness of the contents of this work and specifically disclaim all warranties, including without limitation warranties of fitness for a particular purpose. No warranty may be created or extended by sales or promotional materials. The advice and strategies contained herein may not be suitable for every situation. This work is sold with the understanding that the publisher is not engaged in rendering legal, accounting, or other professional services. If professional assistance is required, the services of a competent professional person should be sought. Neither the publisher nor the author shall be liable for damages arising herefrom. The fact that an organization or Website is referred to in this work as a citation and/or a potential source of further information does not mean that the author or the publisher endorses the information the organization or Website may provide or recommendations it may make. Further, readers should be aware that Internet Websites listed in this work may have changed or disappeared between when this work was written and when it is read.

For general information on our other products and services or to obtain technical support, please contact our Customer Care Department within the U.S. at (800) 762-2974, outside the U.S. at (317) 572-3993 or fax (317) 572-4002.

Library of Congress Control Number: 2006939590

Trademarks: Wiley, the Wiley logo, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates, in the United States and other countries, and may not be used without written permission. Adobe and Acrobat are registered trademarks of Adobe Systems Incorporated in the United States and/or other countries. All other trademarks are the property of their respective owners. Wiley Publishing, Inc., is not associated with any product or vendor mentioned in this book.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

About the Author

Ted Padova is the former chief executive officer and managing partner of The Image Source Digital Imaging and Photo Finishing Centers of Ventura and Thousand Oaks, California. He has been involved in digital imaging since founding a service bureau in 1990. He retired from his company in 2005 and now spends his time writing and speaking on Acrobat and PDF.

For more than 17 years, Ted has taught university and higher education classes in graphic design applications and digital prepress at the University of California, Santa Barbara, and the University of California at Los Angeles. He has been, and continues to be, a conference speaker nationally and internationally at PDF conferences.

Ted has written more than 25 computer books and is one of the world's leading authors on Adobe Acrobat. He has written books on Adobe Acrobat, Adobe Creative Suite (versions 1 and 2), Adobe Photoshop, Adobe Photoshop Elements, Adobe Reader, Microsoft PowerPoint, and Adobe Illustrator. Recent books published by John Wiley and Sons include *Adobe Acrobat PDF Bible (versions 4, 5, 6, and 7)*, *Color Correction for Digital Photographers Only*, *Color Correction for Digital Photographers For Dummies*, *Microsoft PowerPoint 2007 For Dummies — Just the Steps*, *Creating Adobe Acrobat PDF Forms*, *Teach Yourself Visually Acrobat 5*, and *Adobe Acrobat 6.0 Complete Course*. He also co-authored *Adobe Illustrator Master Class — Illustrator Illuminated* and wrote *Adobe Reader Revealed* for Peachpit/Adobe Press.

For Karl and Susanna. May all your days together be as wonderful as you.

Credits

Acquisitions Editor

Kim Spilker

Project Editor

Katharine Dvorak

Technical Editor

Lori DeFurio

Copy Editor

Nancy Rapoport

Editorial Manager

Robyn Siesky

Business Manager

Amy Knies

Vice President and Executive Group

Publisher

Richard Swadley

Vice President and Executive Publisher

Bob Ipsen

Vice President and Publisher

Barry Pruett

Project Coordinator

Patrick Redmond

Graphics and Production Specialists

Joyce Haughey

Jennifer Mayberry

Barbara Moore

Quality Control Technicians

Susan Moritz

Christy Pingleton

Media Development Project Supervisor

Laura Moss

Media Development Specialist

Kate Jenkins

Proofreading and Indexing

Techbooks

Wiley Bicentennial Logo

Richard J. Pacifico

Contents

About the Author v
Preface xxix
Acknowledgments xxxv
Introduction xxxvii

Part I: Welcome to Adobe Acrobat 1

Chapter 1: Getting to Know Adobe Acrobat 3
 What Is Adobe Acrobat?3
 What Is PDF?4
 Document repurposing5
 PDF and Adobe PostScript6
 PDF versions6
 Understanding PDF Standards7
 Looking at the New User Interface7
 Acrobat Environment9
 Menus12
 File menu12
 Edit menu13
 View menu14
 Document menu14
 Comments menu15
 Forms menu16
 Tools menu16
 Advanced menu16
 Window menu17
 Help menu18
 Submenus18
 Context menus19
 Keyboard shortcuts20
 Tools, task buttons, and toolbars21
 Task buttons21
 Loading and unloading tools21
 Default toolbars23
 Managing default toolbars25
 Understanding advanced toolbars28
 Customizing the Acrobat workplace32
 Tool Tips34

Contents

Palettes.....	35
Default palettes	35
Hidden panels	38
Palette menus	43
Context menus	43
Accessing Help.....	44
Getting Started in Acrobat	45
How To pane	45
Acrobat help	46
Complete Acrobat 8.0 Help	46
Adobe LiveCycle Designer	48
More help	48
Acrobat User Community	49
Understanding Preferences.....	50
Summary	51
Chapter 2: Using Acrobat Viewers	53
Viewer Distinctions	53
Adobe Reader.....	54
Acrobat Elements.....	54
Acrobat Standard versus Acrobat Professional	55
Acrobat 3D.....	56
Using Plug-ins	57
Installing plug-ins	58
Uninstalling plug-ins	59
Resolving plug-in conflicts.....	59
Working with plug-ins	60
Summary	60
Chapter 3: Getting Started in Adobe Acrobat	61
Getting Started Window.....	61
Navigating the Getting Started Window	62
Using the Tasks Buttons	63
Opening the Tasks Descriptions from Tasks Buttons.....	69
Summary	70
Chapter 4: Getting Familiar with Adobe Reader	71
Welcome to Adobe Reader	71
Setting Some Critical Preferences	76
Adobe Reader Tools	79
Loading tools and toolbars.....	79
Getting familiar with the Reader tools	81
Default tools	81
Tools available with enabled PDF documents.....	83
Enabling Adobe Reader Usage Rights	84
Commenting in Adobe Reader	85
Using file attachments	85
Working with Forms in Adobe Reader	86
Getting Help.....	86

Adding More Functionality to Adobe Reader87
 Creating PDFs online88
 Understanding Adobe Reader Extensions.....88
 What We Lost in Adobe Reader 8.....89
 Summary89

Chapter 5: Viewing and Navigating PDF Files 91

Setting Up the Work Environment91
 Arranging Toolbars in the Acrobat Window92
 Navigating PDF Documents95
 Navigation toolbar95
 Context menus.....96
 Navigation menu commands96
 Go To.....97
 Zoom.....97
 Page Display98
 Rotate View99
 Reading mode99
 Full Screen mode.....101
 Menu Bar.....101
 Toolbars.....102
 Navigation Tabs.....102
 Grid (Acrobat Professional only)102
 Snap to Grid (Acrobat Professional only)104
 Rulers (Acrobat Professional only)104
 Guides.....105
 Line Weights106
 Automatically Scroll.....106
 Read Out Loud106
 Scrolling.....109
 Zooming.....110
 Marquee Zoom tool110
 Zoom In tool111
 Zoom Out tool111
 Dynamic Zoom tool111
 Loupe tool (Acrobat Professional only).....111
 Pan & Zoom Window (Acrobat Professional only)113
 Zoom tool behaviors114
 Changing Page Views115
 Setting Initial View Attributes.....115
 Understanding Initial View preferences119
 Saving the Initial View120
 Viewing Files with the Window Menu120
 Minimize and zoom views121
 New Window.....121
 Cascade121
 Tile122
 Close All123
 Split123

Contents

Spreadsheet Split	124
Full Screen Mode	124
Viewing Links	124
Navigation panel	124
Navigation panels	125
Hypertext links	127
Opening PDF Files	128
Opening recently viewed files	129
Using the Organizer	129
Using the Categories pane	130
Using the Files pane	131
Using the Pages pane	133
Bookmarking Web-hosted PDFs	133
Summary	135

Chapter 6: Searching PDF Files 137

Setting Up the Work Environment	137
Using the Find Toolbar	138
Using the Search Window	139
Basic search options	140
Where to search	140
Navigating search results	141
Stopping a search	142
Displaying results	142
Searching files and folders	142
Searching PDFs on the Internet	143
Performing advanced searches	144
Searching the open PDF file with Advanced Search Options	145
Searching multiple PDFs with Advanced Search Options	146
Searching layers	151
Boolean queries	151
Search preferences	152
Document Descriptions	153
Searching document descriptions	155
Document descriptions and Boolean queries	155
Full-Text Versus Index Searches	156
Search Index Procedures	156
Creating Search Indexes (Acrobat Professional Only)	157
Preparing PDFs for indexing	157
Document descriptions	158
File structure	160
Optimizing performance	161
Creating search help	161
Creating a new index file	162
Index title	164
Index description	164
Include these directories	165
Exclude these subdirectories	165
Remove	165

Saving index definitions	165
Setting options	166
Do not include numbers	166
Add IDs to Adobe v1.0 files	167
Do not warn for changed documents when searching	167
Custom properties	167
XMP Fields	168
Stop Words	168
Structure tags.....	168
Building the index	169
Stopping builds	169
Building existing indexes	170
Building legacy index files	170
Building index files from secure documents.....	171
Rebuilding an index.....	171
Purging data.....	171
Setting Catalog preferences	171
Indexing	172
Index defaults	172
Using Index Files	173
Loading index files.....	173
Attaching an index file to a document	174
Disabling indexes.....	174
Finding index information	174
Searching an index.....	175
Searching external devices	175
Working with Embedded Index Files	176
Summary	178

Part II: Converting Documents to PDF 179

Chapter 7: Converting Files to PDF 181

Setting Up the PDF Creation Environment	181
Understanding How PDFs Are Created.....	182
Converting Native Documents to PDF	183
Adobe PDF printer (Windows)	184
Adobe PDF (Macintosh OS X)	187
Creating Blank New Pages	190
Creating PDFs from Files	191
Supported file formats	192
Applying settings	195
Converting multiple files to PDF	199
Converting Clipboard images (Windows)	199
Converting Clipboard images (Macintosh)	200
Taking snapshots	201
Creating PDFs from blank pages	201
Scanning to PDF.....	202

Contents

Converting Web Pages to PDF	202
Understanding Web site structure	202
Understanding captured pages structure	203
Accepted file types and links	203
Bookmarks in converted pages	204
Capturing Web pages.....	205
Settings in the Create PDF from Web Page dialog box	206
Conversion settings	207
Page Layout conversion settings.....	213
Determining download status	214
Appending pages	215
Refreshing Web pages	217
Locating Web addresses	218
Setting preferences for Web Capture	219
Creating PDFs from Templates	220
Summary	224
Chapter 8: Using PDFMaker with Microsoft Programs.	225
Setting Up the Environment	225
Using Acrobat with Microsoft Word	226
Changing conversion settings (Macintosh)	228
Changing conversion settings (Windows)	229
Settings	230
Security	231
Word	231
Bookmarks	232
Working with comments (Windows)	234
Working with custom page sizes	238
Creating custom page sizes on Windows	239
Creating custom page sizes on the Macintosh	243
Adding crop marks to PDFs.....	244
Using graphics in Word	247
Converting Microsoft Excel Files to PDF	248
Converting Microsoft PowerPoint Files to PDF.....	251
Converting Microsoft Publisher Files	252
Microsoft Visio and PDF Creation	254
Working with object data.....	256
Converting Web Pages from Internet Explorer to PDF (Windows Only).....	258
Converting Microsoft Outlook E-mails to PDF	261
Summary	265
Chapter 9: Exporting to PDF from Authoring Applications	267
Setting Up the Environment	267
Working with Acrobat and the Adobe Creative Suite	267
Acrobat and Adobe Photoshop.....	268
Saving to PDF from Photoshop	268
Working with Photoshop color modes.....	271
Acquiring PDF files in Photoshop	273
Using comments in Photoshop	276
Creating PDF presentations	276

Adobe Illustrator CS	278
Saving PDFs from Adobe Illustrator CS	278
Saving layered files to PDF	280
Creating multi-page PDFs	282
Saving SWF files	287
Opening Illustrator files in Acrobat	290
Exporting PDFs for print	291
Exporting Adobe PDF Layers	291
Adobe GoLive CS	293
Using Acrobat with Non-Adobe Programs	294
Summary	294

Chapter 10: Using Acrobat Distiller 295

Setting Up the Work Environment	295
Understanding PostScript	296
Creating PostScript files	297
Encoding	299
PostScript levels	299
Using Acrobat Distiller Preferences	299
Startup Alerts	301
Output Options	301
Log Files	301
Editing Adobe PDF Settings	301
Using the Default Adobe PDF Settings	302
Changing Adobe PDF Settings	303
General settings	304
Images	306
Color images	307
Grayscale	308
Monochrome images	308
Guidelines for sampling images	309
Fonts	310
Font types	312
Color	314
Adobe Color Settings	315
Color Management Policies	315
Working Spaces	316
CMYK color spaces	317
Device-Dependent Data	317
Advanced	318
Standards (Acrobat Professional only)	320
PDF/X	320
PDF/A	323
Managing Adobe PDF Settings	324
Identifying Font Locations	324
Using Watched Folders	325
Licensing restrictions	325
Creating watched folders (Acrobat Professional only)	325
Working with Non-Roman Text	328
Accessing Distiller	329
Summary	330

Part III: Editing PDFs 331

Chapter 11: Saving and Versioning Files 333

- Setting Up the Work Environment333
- Saving PDF Files334
- Exporting Data334
 - Adobe PDF files (*.pdf)335
 - Adobe PDF Files, Optimized (*.pdf)335
 - Encapsulated PostScript (*.eps) and PostScript (*.ps)335
 - General settings336
 - Output337
 - Marks and Bleeds.....339
 - PostScript Options.....339
 - HTML 3.2 (*.htm), HTML 4.01 with CSS 1.0 (*.htm), XML 1.0 (*.xml), and Text (Plain) (*.txt).....341
 - JPEG (*.jpg, .jpeg, .jpe), JPEG2000 (.jpf, *.ipx, *.jp2, *.j2k, *.j2c, .jpc), PNG (.png), and TIFF (*.tif, *.tiff)342
 - Microsoft Word Document (*.doc) and Rich Text Format (*.rtf)343
 - Text (Accessible) (*.txt)344
- Saving Different Document Versions (Adobe Acrobat Professional and Creative Suite)344
 - Setting Up the Version Cue Workspace (Adobe Creative Suite users only)345
 - Enabling Version Cue and setting preferences (Adobe Creative Suite users only) ..345
 - Specifying workspace folders (Adobe Creative Suite users)346
 - Enabling Version Cue within Acrobat Professional (Adobe Acrobat and Creative Suite users)347
 - Working with Version Cue files (Adobe Acrobat and Creative Suite users)348
 - Creating a Version Cue project.....348
 - Saving Version Cue files350
 - Understanding states350
 - Adding files to a Version Cue project351
 - Working with the Versions command351
- Summary352

Chapter 12: Combining, Packaging, and Attaching PDFs 353

- Setting Up the Work Environment353
- Combining PDFs354
 - Combining files and folders354
 - Using the Combine Files Wizard357
 - Adding files to the wizard358
 - Organizing files359
 - Previewing files360
 - Conversion options364
 - Editing Bookmark names365
 - Previewing and saving combined files366
- Working with PDF Packages.....367
 - Creating a package367
 - Viewing PDF Packages370
 - Creating a template for a PDF Package.....374

Working with File Attachments	375
Using the Attach tools	376
Record Audio Comment tool	378
Attaching prerecorded sounds	379
Recording sounds	379
Attachments and PDF Packages	380
Using the Attachments panel	381
Summary	383
Chapter 13: Editing Text	385
Setting Up the Text Editing Environment	385
Using the TouchUp Text Tool	386
Changing text attributes	388
Editing text on layers	391
Adding new text to a document	391
Copying text with the TouchUp Text tool	392
Setting Text Editing Preferences	392
Selecting the order of objects	393
Using the Hand tool for text selections	393
Using the Select Tool	394
Copying text	396
Copying multiple pages of text	397
Using the Select All command	398
Copying a file to the Clipboard (Windows only)	399
Working with table data	399
Copying and pasting table data	399
Opening selected data in a spreadsheet document	399
Saving data to a spreadsheet file	400
Looking Up Definitions	401
Working with Text in New Blank Pages	401
Setting text attributes	402
Setting preferences	403
Using the PDF Editor	404
Keyboard shortcuts in the PDF Editor	404
Tools and commands in the PDF Editor	404
PDF Editor behavior	405
Alternate methods for creating blank pages	405
Summary	407
Chapter 14: Redacting PDFs	409
Setting Up the Work Environment	409
What Is Redaction?	409
Getting a Grip on the Redaction Tools	412
Redacting PDF Files	415
Summary	419
Chapter 15: Editing Images and Objects	421
Setting Up the Editing Environment	421
Selecting Images	422

Contents

Using the Select tool	424
Interactivity	425
Pasting images	425
Transforming pasted images	425
Saving image files	426
Image Properties	426
Recognize Text Using OCR	428
Using the TouchUp Object tool	428
Pasting images and objects	429
Place Image	429
Delete Clip	430
Set Clip	430
Rotations	432
Scaling images	433
Create/Remove Artifact	433
Find	433
Show Metadata	434
Properties	434
Image and Object External Editing	435
TouchUp preferences	435
Editing images in Adobe Photoshop	436
Editing objects in Adobe Illustrator	437
Editing text in Adobe Illustrator	438
Using Edit Page in Adobe Illustrator	438
Using the Snapshot Tool	438
Changing snapshot resolutions	439
Pasting snapshot data	441
Exporting Images	442
Summary	443
Chapter 16: Editing Pages	445
Setting Up the Page-Editing Environment	445
Working with Page Thumbnails	446
Navigating pages	447
Changing thumbnail sizes	449
Embedding and unembedding thumbnails	450
Organizing Pages	451
Reordering pages	451
Copying pages	453
Removing pages	453
Modifying Pages	454
Cropping Pages	460
Rotating Pages	463
Rotating PDF elements	464
Minimizing rotation problems	464
Creating Headers and Footers	465
Updating headers and footers	468
Removing headers and footers	468

Numbering Pages	468
Numbering individual PDF documents	468
Using Bates numbering	470
Removing Bates numbers	473
Packaging files with Bates numbers	473
Adding Watermarks and Backgrounds	474
Adding backgrounds	474
Replacing backgrounds	478
Updating backgrounds	478
Removing backgrounds	478
Adding watermarks	478
Removing and updating watermarks	481
Summary	481
Chapter 17: Scanning and OCR Conversion	483
Setting Up the Scanning Work Environment	483
Configuring Scanners	484
TWAIN software	484
Adobe Photoshop plug-in software	484
Understanding Scanning Essentials	485
Preparing a document	485
Photocopying originals.....	485
Ensuring straight alignment	485
Using Scan to PDF	486
Understanding the Acrobat Scan Attributes	488
Input options.....	488
Output options	489
Document options	489
Text recognition and metadata options.....	491
Creating Workflow Solutions	494
Using Text Recognition.....	495
Understanding suspect words	497
Reducing suspects	497
Exporting OCR text	499
Scanning Paper Forms	501
Scanning forms for Adobe LiveCycle Designer (Windows only)	504
Using a digital camera in lieu of a scanner	507
Summary	509
Chapter 18: Repurposing and Batch Processing	511
Setting Up the Environment	511
Reducing File Sizes.....	511
Downsizing cropped images.....	512
Using the Reduce File Size command.....	512
Examining documents	513
Using PDF Optimizer (Acrobat Professional only)	515
Auditing space usage	517
Optimizing files	518
Redistilling Files	520

Contents

Batch Processing PDF Files	521
Creating a batch sequence	521
Setting output options	524
Running sequences	525
Editing sequences	526
Creating custom sequences	526
Summary	529
Chapter 19: Enabling Features for Adobe Reader.	531
Setting Up the Enabling Work Environment	531
Adobe LiveCycle Reader Extensions Server	532
Restrictions for Enabling Features	532
Audience	532
Licensing restrictions	533
Enforcing the restrictions	533
Enabling PDF Documents with Reader Extensions (Acrobat Professional only)	533
Enabling PDFs for Commenting	533
Enabling PDFs for Comment & Review	535
Enabling PDFs for form saves	535
Sending files for Shared Reviews	536
Distributing Forms?	537
What about Adobe Designer Forms?	538
Editing Enabled PDF Files	538
Modifying an enabled PDF file	539
Working with enabled files and PDF Packages	540
Summary	542

Part IV: PDF Interactivity

543

Chapter 20: Review and Markup 545

Setting Up the Review and Comment Environment	546
Setting Commenting Preferences	546
Looking at the Comment & Markup Toolbar	549
Using the Comment & Markup Tools	550
Using the Sticky Note tool	550
Managing notes	552
Sticky Note tool properties	556
Setting default properties	559
Using the Properties Bar	560
Working with the Text Edits tools	560
Working with the Highlight tools	562
Attaching Files as Comments	562
Recording audio comments	562
Using the Stamp tool	562
Selecting stamps	563
Adding a stamp to a page	563
Changing stamp properties	565
Creating custom stamps	565

Appending stamps to a new category.....	568
Pasting a clipboard image as a stamp.....	568
Attaching files.....	570
Using the Markup Tools.....	570
Callout tool.....	570
Cloud tool.....	570
Line tools with inline text.....	571
Text Box tool.....	571
Drawing tools.....	571
Drawing tools and context menus.....	572
Line tool properties.....	572
Managing line comments.....	573
Using the Show Menu.....	574
Using the Comments Menu.....	575
Using the Comments Panel.....	576
Viewing comments.....	577
Sorting comments.....	578
Navigating comments.....	578
Searching comments.....	579
Printing comments.....	579
Deleting comments.....	579
Marking comments.....	580
Setting comment status.....	580
Editing comment pop-up notes.....	580
Exporting and Importing Comments.....	580
Exporting/importing comments to and from a file.....	581
Exporting selected comments.....	581
Filtering Comments.....	581
Creating Comment Summaries.....	582
Comparing Documents.....	585
Summary.....	586

Chapter 21: Working with Review Sessions. 589

Setting Up the Commenting for Reviews Environment.....	589
Creating an Attach for E-mail Review.....	589
Initiating an Attach for E-mail review.....	590
Participating in a review.....	594
Recipient participation.....	596
Author participation.....	597
Using the Review Tracker.....	597
Viewing documents in the Review Tracker.....	598
Forms Tracker.....	599
RSS (Subscriptions).....	599
PDF creation from the Review Tracker.....	601
Working with Shared Reviews.....	602
Setting Reviewing preferences for browser-based reviews.....	602
Working in a Shared Review.....	604
PROXY Reviewers.....	609
Working offline.....	609

Contents

Migrating Comments	611
Summary	612

Chapter 22: Links and Actions 613

Setting Up the Links and Actions Environment	613
Working with Bookmarks.....	614
Creating bookmarks.....	614
Managing bookmarks.....	617
Renaming bookmarks	618
Structured bookmarks	619
Bookmark appearances	620
Bookmark properties	621
Using the Properties Bar.....	622
Setting bookmark opening views	623
Working with Articles.....	623
Viewing and navigating articles	623
Article properties	624
Viewing articles	626
Defining articles.....	627
Ending an article thread.....	627
Deleting articles	627
Combining articles.....	627
Working with the Link Tool	628
Creating links for page navigation	628
Linking to views.....	631
Editing a link action.....	632
Link appearance properties	632
Link properties.....	633
Link actions properties.....	634
Go to a 3D View	635
Go to a page view	635
Execute a menu item	635
Import form data	636
Open a file.....	637
Open a web link	637
Play a sound	637
Play media (Acrobat 5 compatible)	638
Play media (Acrobat 6 and later compatible)	638
Read an article	639
Reset a form.....	639
Run a JavaScript	639
Set layer visibility.....	640
Show/hide a field.....	640
Submit a form	641
Managing links	641
Working with Page Properties	642
Creating Destinations	643
Destination tools	643
Creating a pop-up menu	644

Working with Buttons (Acrobat Professional only)	647
Creating a button field	648
Duplicating buttons	650
Summary	651
Chapter 23: Multimedia and PDFs	653
Setting Up the Multimedia Environment	653
Working with Sound Files	654
Creating sound files	654
Adding sounds to page actions	656
Adding sounds to form field actions	657
Using the Sound tool	658
Acrobat 5-compatible Movie (Sound) Properties	660
Acrobat 6-compatible Multimedia (Sound) Properties	664
Creating Movie Files	669
Importing Movies	669
Acrobat 5-compatible movies	670
Add Movie	670
Acrobat 5 Movie Properties	671
Acrobat 6-compatible movies	673
Add Movie	674
Acrobat 6 Multimedia Properties	674
Creating Play Buttons	678
Summary	681
Chapter 24: Working with Layers	683
Setting Up the Work Environment	683
Understanding Layers	684
Layer Visibility	685
Setting initial visibility	685
Showing/hiding layers	686
Initial Views	686
Layer Properties	687
Changing the default state	687
Locking visibility	688
Changing the initial state	688
Overriding defaults	689
Managing layers	690
Merging layers	690
Flattening layers	691
Creating Layer Visibility Buttons	692
Using Measuring Tools	693
Measuring surface area	694
Changing markup appearances	696
Measuring Preferences	696
Comments, measurements, and layers	698
Summary	698

Chapter 25: Accessibility and Tagged PDF Files 699

Setting Up the Work Environment	699
Creating Accessible Documents	700
Understanding accessibility	700
Adding accessibility in authoring applications	702
Making existing PDFs accessible	703
Performing a Quick Check	703
Performing a Full Check (Acrobat Professional only)	703
Adding accessibility	706
Understanding Structure	706
Using the Tags palette	708
Adding alternate text	708
Using the Content tab	709
Using the Order tab	710
Checking accessible tags	710
Viewing Accessible Documents	711
Summary	712

Part V: PDF Publishing 713

Chapter 26: Authentication and Security 715

Setting Up the Work Environment	715
Restricting the Opening and Editing of Files	716
Using password security	716
Using a security policy	720
Managing security policies	724
Copying and editing policies	724
Viewing and deleting policies	725
Understanding Digital IDs	725
Creating a personal digital ID	727
Creating a custom appearance	727
Creating a digital ID	729
Managing multiple IDs	731
Setting usage options	731
Previewing before signing	731
Using signature fields	732
Creating a signature field when signing a document	734
Certifying a document	734
Protect an Adobe PDF File	734
Working with Digital Signatures and PDF Packages	736
Using Trusted Identities and Certificate Security	738
Using certificate encryption	738
Exporting public certificates	739
Requesting contacts	740
Managing Trusted Identities	741
Setting certificate security permissions	742
Validating Signatures	744

Creating a Security Envelope	746
Summary	748
Chapter 27: PDFs and the Web	751
Setting Up the Environment	751
Viewing PDFs in Web Browsers	752
Working with Web links.....	755
Web links in the Organizer	756
Adding Web links to multiple pages.....	756
Controlling links view behavior	758
Converting PDF to HTML	759
Setting export options	759
Converting text documents to HTML.....	760
Exporting PDF files with images to HTML	762
Summary	764
Chapter 28: PDFs and Presentations	765
Setting Up the Work Environment	765
Creating Presentation Documents.....	766
Converting PowerPoint slides to PDF (Windows)	766
Converting PowerPoint notes and handouts to PDF.....	770
Converting PowerPoint slides to PDF (Mac).....	776
Converting Apple Keynote slides to PDF (Mac)	777
Converting authoring application documents to PDF.....	778
Working with Page Transitions and Effects	779
Converting animations to PDF from PowerPoint	779
Adding page transitions in Acrobat viewers	779
Using Full Screen Views	781
Setting Full Screen preferences.....	781
Saving Initial View options for files opening in Full Screen mode	784
Scrolling pages in Full Screen mode.....	785
Creating interactivity in Full Screen mode	785
Creating links and buttons for cross-document linking	786
Using interactive devices	786
Conducting Presentations and Online Meetings	787
Summary	788
Chapter 29: Using Acrobat Connect	789
Setting Up the Work Environment	789
Understanding Acrobat Connect	789
Setting Up an Account	791
Using Acrobat Connect and Professional Sessions	792
Summary	794
Chapter 30: PDFs and eBooks	795
Setting Up the eBook Work Environment.....	796
Creating eBooks	796
Adobe Content Server 3	796
Adobe LiveCycle Policy Server	796

Contents

Acquiring Adobe Digital Editions	796
Exploring the Adobe eBook Mall	798
Reading eBooks	799
Summary	800
Chapter 31: Printing to Desktop Color Printers	801
Setting Up the Work Environment	801
Understanding Color Management	801
Selecting a Color Workspace	802
Using Color Output Profiles	804
Some Printing Basics in Acrobat	804
Who's Going to Manage Color?	806
Printing to Desktop Printers	807
Printing to Epson printers	807
Printer profile selection on Windows	808
Printing from the Macintosh enabling the printer to determine color	811
Selecting a printer profile	814
Printing using a printer profile on Windows	814
Printing using a printer profile on the Macintosh	815
Printing to HP inkjet printers	816
Printing to HP printers on Windows	816
Printing to HP printers on the Macintosh	817
Printing to Canon printers	818
Printing to Canon printers on Windows	818
Printing to Canon Printers on the Mac	819
Printing Comments, Forms, and Summaries	821
Printing comments	821
Printing form field data	822
Printing comment summaries	822
Summary	823
Chapter 32: Commercial Printing and Prepress	825
Setting Up the Work Environment	825
Soft Proofing Color	826
Setting up your color management environment	826
Output Preview	826
Color Warnings	826
Separations	829
Convert Colors	830
Ink Manager	832
Transparency Flattener Preview	833
Trapping Files	834
Fixing hairlines	834
Creating trap presets	835
Cropping Pages	836
Adding printer marks	836
Cropping pages	837
PDF Optimizer	837

Working with Job Definition Files	837
Preflighting PDF Files.....	839
Preflighting a file	840
Creating a new profile	840
Creating reports and comments	842
Printing PDFs for Commercial Printing	842
Output.....	844
Marks and Bleeds.....	845
PostScript Options.....	845
Summary	846

Part VI: Acrobat PDF and LiveCycle Designer Forms 849

Chapter 33: Designing PDF Forms (Windows Only) 851

Setting Up the Work Environment	852
The Adobification of Designer	852
Preparing the workspace	854
Understanding the Why for Adobe LiveCycle Designer	856
Getting Started with a New Form Design	857
Creating a Simple Form in Designer	860
Creating a blank new page.....	860
Adding an image	864
Working with text fields.....	865
Duplicating fields.....	871
Adding graphic objects to a form	873
Adding radio buttons to a form	875
Adding a drop-down list to a form.....	877
Finishing up a form	878
Importing a PDF Document	881
Converting a PDF document to a Designer form	881
Add text fields	883
Adding numeric fields	883
Managing fields	885
Calculating fields	886
Adding a signature field	888
Creating Dynamic Forms	890
The anatomy of a dynamic form.....	891
Setting up the form properties	894
Working with subforms	895
Adding subforms to a document	896
Using the Hierarchy palette	897
Subform types	902
Calculating data.....	903
Distributing forms	905
Run-time events.....	906
Converting Designer XML Forms to Acrobat PDF Forms	908
Converting a static form to an Acrobat PDF form.....	909
Converting a dynamic XML form to an Acrobat PDF form.....	910

Contents

Enabling Forms with Reader Extensions.....	913
Creating Data Connections.....	914
XML schema and XML data sources.....	914
Connecting to OLEDB data sources.....	915
WSDL file.....	916
Learning Adobe Designer.....	919
Summary.....	921

Chapter 34: Understanding Acrobat Form Tools 923

Setting Up the Environment.....	923
What Are Acrobat Forms?.....	924
The non-PDF form.....	925
Development of a PDF form.....	925
Filling In Forms.....	925
Using the Typewriter tool.....	925
Filling in forms containing form fields.....	926
Form field navigation keystrokes.....	927
Viewing fields.....	928
Using Auto-Complete features.....	929
Working in the Forms Editing Environment.....	931
Form Field Recognition.....	932
Understanding form fields.....	936
Assigning Form Field Properties.....	938
General properties.....	939
Appearance properties.....	939
Options properties.....	941
Text options.....	941
Check box and radio button options.....	943
Combo box and list box options.....	945
Button options.....	947
Barcode options.....	949
Actions properties.....	950
Importing form data.....	951
Resetting a form.....	951
Submitting a form.....	952
Format properties.....	952
Validate properties.....	954
Calculate properties.....	955
Selection Change properties.....	955
Digital Signature fields properties.....	956
Barcode properties.....	957
Using the Properties Bar.....	958
Managing fields.....	958
Organizing fields.....	959
Duplicating fields.....	959
Moving fields.....	959
Deleting fields.....	959
Aligning fields.....	960

Sizing fields	961
Creating multiple copies of fields.....	961
Duplicating fields.....	962
Setting attribute defaults	962
Setting field tab orders	962
Creating a PDF Form	964
Adding text fields.....	964
Adding radio buttons and check boxes	968
Adding Combo and List Boxes to a form	969
Adding a Button field.....	970
Using the Fields Panel	971
Summary	973
Chapter 35: Working with Form Data.	975
Setting Up the Environment.....	976
Calculating Field Data	976
Formatting for calculations	976
Using the preset calculation formulas.....	977
Summing data on parent names.....	978
Using hidden fields	979
Using Simplified field notation.....	979
Using JavaScripts	979
Managing Form Data	981
Importing and exporting data	981
Creating common fields.....	982
Exporting FDF/XML data.....	983
Importing FDF/XML data	984
Importing text data	984
Creating spreadsheets from form data	986
Exporting data to a spreadsheet	987
Aggregating data from multiple files into a single spreadsheet	988
Aggregating FDF/XML data	990
Submitting and Receiving Data Forms	990
Creating a Submit Form button	990
Distributing forms	994
Compiling form data	997
Using the Forms Tracker	998
Summary	999
Chapter 36: Understanding JavaScript.	1001
Setting Up the Environment.....	1001
Getting Started with Acrobat JavaScript	1002
Finding JavaScripts	1002
Examining field scripts	1002
Bookmarks and links	1005
Examining document-level JavaScripts	1005
Examining page actions	1006
Examining document actions.....	1007
Searching for page templates	1007

Contents

Using the JavaScript Debugger	1008
Using the JavaScript Console	1009
Creating Viewer Options Warning Alerts	1010
Creating viewer type alerts	1010
Creating viewer version alerts	1013
Performing JavaScript Calculations.....	1014
If/else statements	1015
Calculating dates	1016
Using loops	1017
Using Document Actions	1018
Working with Page Templates	1019
Creating a page template	1020
Spawning a page from a template.....	1022
Creating Pop-Up Menus.....	1023
Writing document-level JavaScripts	1024
Creating a pop-up menu	1025
Pop-up menus for page navigation in PDF Packages	1025
Working with Trusted Functions	1029
Creating new documents	1029
Adding menu commands.....	1031
Using a JavaScript Builder	1033
Summary	1036
Appendix: Using the CD-ROM	1037
System Requirements	1037
Installation Instructions	1037
Contents.....	1037
Adobe Reader 8.0.....	1038
PDF version of the book	1038
Author-created PDF documents	1038
Windows demonstration plug-ins	1039
Troubleshooting	1039
Customer care	1039
Index	1041
End-User License Agreement	1086

Preface

A *dobe Acrobat 8 PDF Bible* is written for a cross-platform audience. Users of Microsoft Windows 2000 with Service Pack 2, Windows XP Professional or Home Edition, Tablet PC Edition, and Apple Macintosh computers running OS X v10.2.8, 10.3, and later will find references to these operating systems.

About This Book

Most of the chapters in this book include screenshots from Acrobat running under Windows. The user interface is closely matched between Windows and the Macintosh; therefore, Macintosh users will find the same options in dialog boxes and menu commands as found in the screenshots taken on a Windows machine. Where significant differences do occur, you'll find additional screenshots taken on a Macintosh to distinguish the differences.

How to read this book

I have to admit this publication is not a page turner that leaves you grasping for more time to finish up a chapter before retiring at night. After all, it's a computer book and inasmuch as my editors at Wiley always strive to get me to add a little *drama* to the text, few people will pick up this *Bible* and read it cover to cover. This book should be thought of more as a reference where you can jump to an area and read over the contents to help simplify your work sessions in Acrobat Standard (now available only on Windows in version 8.0) or Acrobat Professional version 8.0.

Because Acrobat is such a behemoth program and can do so many things for almost any kind of work activity, most people won't use every feature the program provides. You may be interested in converting files to PDF and setting up reviews, or you may devote more attention to the area of prepress and printing, or perhaps it's accessibility or PDF forms that's part of your work. Therefore, you may ignore some chapters and just want to jump to the area that interests you most.

Regardless of where you are in Acrobat experience, you should be able to gain much insight and skill at using the new version of Acrobat by studying in detail those areas that interest you most. However, don't completely ignore chapters that cover features you think you won't use. You can find many related concepts falling under headings that are not exclusively related to the general topic for each chapter. For example, you may not be interested in creating accessible PDFs for screen readers. However, the Accessibility chapter also includes coverage of document structures and tagging, which will be important if you need to get the content of a PDF back out to an authoring application.

Because many chapters may include features that relate to the work you want to perform, studying over the most important features of interest to you and skimming over those chapters that appear to be less beneficial for you works best.

Preface

To begin, I recommend you look closely at the section in the Introduction covering new features in Acrobat 8.0. No matter where you are in Acrobat skill, be certain to understand PDF navigation, as things have changed for moving around PDF files and creating cross-document links. Look closely at the Help documents and the Help features in Acrobat 8.0. Pay particular attention to Chapters 8, 12, 14, 19, 29, and 31. If you've read the *Adobe Acrobat 7 PDF Bible*, these chapters are all new in this revision of the book. In many other chapters of the book, the text has been completely updated and revised. Some chapters have been expanded to cover more depth in specific areas. For example, Chapter 33 on Adobe LiveCycle Designer has been expanded by more than 50 pages over the last book.

Throughout the book are sections called "Steps." If you find the contents of a given series of steps interesting, follow the steps to see whether you can replicate what is covered in that section. In this book, I've made an effort to expand steps greatly to provide you some tutorial assistance in understanding many concepts.

Icons

The use of icons throughout the book offers you an at-a-glance hint of what content is being addressed. You can jump to this text to get extra information, be warned of a potential problem, or amplify the concept being addressed in the text. In this book you'll find icons for the following:

CAUTION

A Caution icon alerts you to a potential problem in using Acrobat, any tools or menus, or any supporting application that may be the origination of a document to be converted to PDF. Pay close attention to these caution messages to avoid potential problems.

CROSS-REF

The Cross-Ref icon indicates a cross-reference to another area in the book where more information can be found on a topic. It is almost impossible to walk you through Acrobat in a linear fashion because it has so many interrelated features. Covering all aspects of a single feature in a contiguous section of the book just doesn't work. Therefore some common features for a command, a tool, an action, or task may be spread out and discussed in different chapters. When the information is divided between different sections of the book, you'll find a Cross-Reference icon that cross-references the current passage to another part of the book covering related information.

NEW FEATURE

An icon appears throughout the book where a new feature in Acrobat 8 has been added to the program. Pay special attention to these icons to learn more about what has been added to Acrobat 8, Adobe Reader 8, and Adobe LiveCycle Designer 8.

NOTE

A Note icon signifies a message that may add more clarity to a text passage or help you deal with a feature more effectively.

PDF WORKFLOW

Where workflow solutions are particularly applicable, you'll see an icon indicating that the text describes tasks or features that apply to workgroups and workflows. This icon will be an important signal for people in large businesses, government, and education where large workgroups with common tasks exist.

PREPRESS

Much support is offered in version 8.0 for the prepress and printing market. If you're a design professional, service bureau, or print shop, take note of these messages for information related to prepress and printing.

TIP

Tips are handy shortcuts. They help you to more quickly produce results or work through a series of steps to complete a task. Some tips provide you with information that may not be documented in the Help files accompanying Acrobat Professional.

The book's contents

This book is about Adobe Acrobat Standard (on Windows) and Adobe Acrobat Professional on Windows and the Macintosh. All the content in the book applies to Acrobat Standard, unless you see a reference that a specific section applies only to Acrobat Professional. Acrobat Professional features are clearly marked throughout the book so you know when Acrobat Standard doesn't support a particular feature.

Just about everything that you can do with Adobe Acrobat is contained in the chapters ahead. This book is *not* about Adobe LiveCycle Designer, Acrobat PDF Forms, collaboration, PDF creation, Acrobat JavaScript, or some other aspect of Acrobat exclusively. Some Acrobat features can take a book this size alone to cover in their entirety. What this book does for you is provide you some exposure and understanding for *all* that Acrobat can do. You'll find chapters on Adobe LiveCycle Designer and Acrobat JavaScript, several chapters on PDF creation, and chapters on collaboration. However, any one of these areas is not exclusive to the content of the book.

I've made an effort to address many different uses for all types of users. This book covers Acrobat features and how to work with Adobe Acrobat Professional, Adobe Acrobat Standard, Adobe Reader, and companion products. Individual industries such as office occupations, digital prepress, engineering, enterprise workflows, and multimedia and Web publishing are covered. Regardless of what you do, you should be able to find some solutions for your particular kind of work. Whether you are an accounting clerk, a real estate salesperson, a digital prepress technician, an engineer, a Web designer, or a hobbyist who likes to archive information from Web sites, there's a reference to your needs and Acrobat will provide a solution.

To simplify your journey through the new release, the book is broken up into six separate parts. A total of 36 chapters address Acrobat features and some individual purposes for using the software. The six parts include the following:

Part I: Welcome to Adobe Acrobat. To start off, I offer some discussion on the PDF format and its new revision. Acrobat 8.0 has many new features and a new Getting Started window to help you find help fast. I cover tools, menus, and palettes to help you understand many Acrobat 8.0 features. This section covers the distinctions between different viewer types, navigating through PDFs, and using the Find tool and the Search panel to search PDF files.

Part II: Converting Documents to PDF. There are many different ways to create a PDF document and all these methods are thoroughly covered in Part II. I begin by discussing the ease of creating simple PDF files that might be used by office workers and travel through to much more sophisticated PDF file creation for more demanding environments. A new chapter devoted entirely to Microsoft applications has been added. In addition, I discuss how many application software manufacturers are supporting PDFs through direct exports from their programs. I discuss the Adobe Creative Suite and how you can integrate PDF with the CS applications. A bonus chapter on the CD-ROM in the CD version of the book has been added to detail more of what you can do with Acrobat Distiller for creating PDF documents. The advantages and disadvantages of using all these methods are also discussed.

Part III: Editing PDFs. This section covers editing, modifying, and enhancing PDF files for many different purposes. Also covered are how to modify content and how to flow content between Acrobat and authoring programs. New features for combining and packaging PDFs and redacting PDFs are added in special new chapters. I also discuss scanning in Acrobat and converting scans to text with Optical Character Recognition (OCR). Document repurposing is covered in this section for users who want to modify files for different output mediums. Another new chapter on all the enabling features available in Acrobat Professional is included in this section.

Part IV: PDF Interactivity. Part IV covers interactivity with PDF documents for workgroups through the use of Review and Comment tools, shared reviews, adding interactive elements such as multimedia, and links and buttons. I address the layer features in Acrobat Professional and include a chapter devoted to making PDF documents accessible.

Part V: PDF Publishing. This section covers distribution of PDF files in some of the more common means available today. I begin with security and authentication as your first step in document distribution and then move on to PDF workflows. I discuss creating PDFs for different kinds of distribution, such as presentations, and offer complete coverage of all the printing and prepress features. I also offer information about eBooks in Part V. Hosting your PDFs on the Web and sending them via e-mail are also covered in this section. New chapters have been added in this section that cover the new Acrobat Connect application and a chapter is devoted to printing color PDFs to desktop color printers.

Part VI: Acrobat PDF and LiveCycle Designer Forms. This section covers PDF forms and data. For Windows users I cover using Adobe LiveCycle Designer 8 in a much more extended and detailed chapter for forms authoring. All the new forms features for distributing forms, collecting form data, and running form field recognition are included in this section. An introduction to JavaScript and writing simple JavaScript routines is also included in this section.

Staying Connected

It seems like new products and new upgrades are distributed about every five minutes. If you purchase a software product, you can often find an updated revision soon after. Manufacturers rely more and more on Internet distribution and less on postal delivery. You should plan on making routine visits to Adobe's Web site and the Web sites of third-party product manufacturers. Any software vendor that has a Web site will offer a product revision for download or offer you details on acquiring the update.

Internet connection

With newer releases of computer software, an Internet connection is now essential. Programs, including Acrobat, prompt you routinely to check for updates over the Internet. To optimize your performance with Acrobat, you should run the software on a computer that has an Internet connection.

Registration

Regardless of whether you purchase Acrobat Professional, Acrobat Standard, Acrobat 3D, or Acrobat Elements, or download the free Adobe Reader software, Adobe Systems has made it possible to register the product. You can register on the World Wide Web or mail a registration form to Adobe. If you develop PDF documents for distribution, Adobe likes to keep track of this information. You will find great advantage in being a registered user. First, update information will be sent to you, so you'll know when a product revision occurs. Second, information can be distributed to help you achieve the most out of using Acrobat. Who knows — some day you may be asked to provide samples of your work that might get you a hit from Adobe's Web site. By all means, complete the registration. It will be to your benefit.

Web sites to contact

Obviously, the first Web site to frequent is Adobe's Web site. When Acrobat and the Acrobat plug-ins are revised, downloads for updates will become available. You can also find tips, information, and problem solutions. Visit Adobe's Web site at www.adobe.com. Also make use of the Help→Adobe Expert Support

menu command in all Acrobat viewers. This command opens a Web page where you can order technical support for a nominal fee. For acquiring plug-ins for Acrobat visit the Adobe Store where you can find a comprehensive list of plug-ins and demonstration software that works with Acrobat. Visit the Adobe Store at: www.store.adobe.com/store.

A wealth of information is available on the Acrobat Users Community Web site at www.acrobatusers.com. Here you can find tips, techniques, blogs hosted by some of the world's leading Acrobat professionals, and support for starting and maintaining a local Acrobat User Group. Be certain to routinely check Acrobat Users for up-to-date information and assistance. You can e-mail leading professionals who can help you solve problems.

Acrobat tips are available on many Web sites — all you need to do is search the Internet for Acrobat information. An excellent source for information as well as a comprehensive collection of third-party plug-ins is Planet PDF. You can visit them at www.planetpdf.com.

More Acrobat plug-ins can be found on ThePowerXChange Web site. Log on to www.thepowerexchange.com Web site for a vast list of Acrobat plug-ins and demo software.

Another source of information, articles, tips, Acrobat and PDF information can be found at www.pdfzone.com. Visit the pdfZone Web site for up-to-date articles and interviews with industry leaders.

If learning more about Acrobat is your interest, you can find regional conferences sponsored by DigiPub Solutions Corporation. If you want to meet and discuss PDF issues with some of the world's experts, look for a conference in your area. You can find information at www.pdfconference.com.

The American Graphics Institute offers another PDF conference program. You can find out more information by logging on to www.AGITraining.com.

A new conference has popped up in the Midwestern part of the USA in Council Bluffs, Iowa. To find out more about the Acrobat Central Conference log on to www.pdfcentralconference.com.

The Open Publish conference in Sydney, Australia, is an annual conference for design and creative professionals. This organization hosts many PDF-related seminars and workshops annually. Find out more at www.openpublish.com.au.

In Japan try out the PDF Conference held in Tokyo. Visit www.pdfconf.gr.jp for more information.

Whatever you may desire is usually found on some Web site. New sites are developed continually so be certain to make frequent searches.

Contacting Me

If, after reviewing this publication, you feel some important information was overlooked or you have any questions concerning Acrobat, you can contact me and let me know your views, opinions, hoorahs, or complaints, or provide information that might get included in the next revision. (If it's good enough, you might even get a credit line in the acknowledgments!) By all means, send me a note. Send your e-mail inquiries to ted@west.net.

Chances are that if you have a problem or question about Acrobat, you're not alone and many others might be interested in your question and a response to the question. Send your questions directly to my blog on Acrobat Users at: www.acrobatusers.com/blogs/tepadova. In addition to my blog, some very talented friends who know so much more than I do also host blogs on Acrobat Users. Visit www.acrobatusers.com/blogs to see a complete list of the blog hosts.

Preface

If you happen to have some problems with Acrobat, keep in mind that I didn't engineer the program. Inquiries for technical support should be directed to the software developer(s) of any products you use. This is one more good reason to complete your registration form.

There you have it — a short description of what follows. Don't wait. Turn the page and learn how Acrobat can help you gain more productivity with its amazing new features.

Acknowledgments

I would like to acknowledge some of the people who have contributed in one way or another to make this edition possible. Mike Roney, my former acquisitions editor at Wiley who started out this project with me, and later my acquisitions editor, Kim Spilker, who helped me finish the project; my project editor, Katharine Dvorak, who was my project editor on the first *Acrobat PDF Bible* I wrote and who I was very pleased to have back with this edition; copy editor, Nancy Rapoport; and editorial manager, Robyn Siesky; as well as the rest of the Wiley crew who participated in the project.

What can I say about my Technical Editor, Lori DeFurio? Lori is perhaps the single best advocate for Acrobat and PDF, promoter, and solutions provider to people worldwide than any other individual on the planet. With an incredibly demanding schedule that takes her to all corners of the earth, Lori finds time to review more than a thousand pages of text and can find things as small as a period out of place in a manuscript. As Adobe's premiere Acrobat and PDF authority, her technical expertise in reviewing this book was invaluable to me. Lori is always my first contact when I don't understand something about Acrobat. This is the fifth book Lori and I have worked on together and my Acrobat books are always that much better because of Lori's contributions.

Much appreciation and thanks also go to my friend and colleague Leonard Rosenthal of Adobe Systems, who always stands ready to provide me with advice and assistance. Leonard graciously jumped in to help Lori with some of the technical editing on the printing chapters, and his comments were very helpful. A special thank you is extended to my friend and another colleague, Thom Parker of Windjack Solutions (www.windjack.com), who graciously helped me with questions related to Acrobat JavaScript. Thom's company also provided copies of Windjack Solutions' AcroButtons and AcroDialogs Acrobat plugins for the book's CD-ROM.

I feel very fortunate in having so much support from many people at Adobe Systems who were continually available for comments, suggestions, and favors over a four-month period of time while Acrobat 8.0 was in development. The energy and enthusiasm of the engineering and marketing teams throughout the development period made it evident that this is a group of people with passion and excitement for their work. A hearty thank you is extended to Rick Brown, senior Acrobat Product Manager, for his support, telephone conversations, and offering a quote you see appearing on the cover of the book; David Stromfeld, Product Manager, who spent time with me in a number of phone conversations and e-mails; Dov Isaacs for his insight, valuable perspectives, straightforward and no-nonsense responses to questions, Ali Hanyalolu for his support and advice for promoting Acrobat for educators, Greg Pisocky for adding some pointers on Acrobat and accessibility, Macduff Hughes for helping Lori and me out with some PostScript related issues, Bill McCoy for information on the new Digital Editions interface, and many other Adobe employees in the engineering and marketing divisions who graciously offered feedback and advice during the development of the Acrobat 8 family of products.

I'd also like to thank Kurt Foss, editor of Acrobat Users Community; Pooja Goyal of Adobe Systems; my colleagues on Acrobat Users, Carl Young, Jo Lou Young, Duff Johnson, Dimitri Munkirs, and Patty-Bing-You for much support in keeping up-to-date information available on the Acrobat Users Community Web site and for their willingness to help when I needed it.

Acknowledgments

Additionally, I'd like to thank another friend and colleague, Robert Connolly of pdfPictures.com, and his client Aruba Bonbini for permissions to include the Aruba Bonbini eBrochure on the book's CD-ROM. And again, I would like to thank my good friend Lisle Gates for permitting me to use his photos in several layouts.

Introduction

This book is the fifth edition of *Acrobat PDF Bible*. As a result of feedback from many users, this edition is an effort to include coverage of some topics missed in the last version and to add additional material where users asked for more detail. As you will see by browsing the contents of the book or launching the new version of all the Acrobat viewers, including Adobe Reader, Adobe Acrobat Standard (Windows only), and Adobe Acrobat Professional, there are many changes in the programs. As such, I've made an effort to cover as much of the new version as is possible in this single, comprehensive book.

What Is Adobe Acrobat?

We've come a long way in Acrobat evolution, and those users of Adobe Acrobat are familiar with the distinctions between the Adobe Reader software and Adobe Acrobat (either Standard or Professional). However, among the many users of Adobe Reader, there still exists some confusion about what Reader can and cannot do. When acquiring Adobe Reader, many folks think the viewing of PDF documents with Adobe Reader is the extent of Acrobat. Now in version 8, Adobe Reader can do much more in terms of editing PDF documents. In addition to editing features, Acrobat Professional 8.0 now includes the much desired options for enabling PDFs with special features for Adobe Reader users for saving form data and adding digital signatures.

For those who don't know the difference, I explain in Chapter 2 that Adobe Reader is only one small component of Acrobat. Other programs included in the suite of Acrobat software provide you with tools for creating, editing, viewing, navigating, and searching Portable Document Format (PDF) information. Regardless of your familiarity with previous versions of Acrobat, you should carefully review Chapter 2. In Chapter 4, you'll find some details on all the new features added to Adobe Reader and how you can add to PDF documents some new Reader Extensions that enable the Adobe Reader user much more functionality than was available in all versions prior to version 8.

Acrobat has evolved with many different changes both to the features it offers you and often to the names associated with the various components. In earlier versions of Acrobat, names such as Acrobat Professional, Acrobat Exchange, and then simply Acrobat were used to refer to the authoring application. Version 8.0 of Adobe Acrobat, fortunately, continues with the same product names as found in Acrobat 7. The high-end performance application is referred to as Adobe Acrobat Professional. In release 8, as was the case in version 7, there is also a lighter Acrobat version with many of the same features found in Acrobat 5.x. The lighter version, also the same as was available in Acrobat 7, is called Adobe Acrobat Standard. Now in version 8 of Acrobat, Acrobat Standard has been discontinued on the Mac and appears only on Windows. This program has all the features you find available in Acrobat Professional with the exception of forms authoring, high-end printing and prepress, enabling documents with Adobe Reader extensions, and some differences in tools and menu commands. As you follow the pages in this book, you can apply most of what is contained herein to either Acrobat Standard or Acrobat Professional, with the exception of Chapters 19 and 32, and Part VI where I talk about forms.

Introduction

One more product you can purchase from Adobe Systems in the Acrobat family is Adobe Acrobat Elements. Elements is a low-cost PDF-creation tool designed for enterprises, and it requires that you purchase a site license of a minimum of 1,000 copies. The Adobe Acrobat Reader software remains a free download from Adobe Systems and offers you many more features than found with previous versions of the Acrobat Reader software.

Nomenclature

The official name for the new release of the high-end Acrobat product is Adobe(r) Acrobat(r) 8.0 Professional. You'll notice the registered marks appearing in the name. For the sake of ease and clarity, as you read through the book and see a reference to Acrobat, Adobe Acrobat, and Acrobat Professional (also called Acrobat Pro), please realize that the reference is to Adobe Acrobat Professional. For the other authoring application, the official name is Adobe(r) Acrobat(r) Standard. When referring to this product I may use terms such as Acrobat Standard or simply Standard. Where it makes sense I'll say it like it is supposed to be used; otherwise, I'll use an abbreviated name.

The official name for the lighter version is Adobe Acrobat Elements, and the free downloadable software is Adobe Reader. Again, for the purposes of communication and ease, I may refer to the applications as Elements or Reader. Please realize, however, that the official name should prevail when you communicate in writing about these products.

For Windows users, Acrobat 8.0 Professional also ships with Adobe(r) LiveCycle(r) Designer 8.0. You may find references to this product stated as LiveCycle Designer, Designer, or LCD. All of these references are made to the Adobe LiveCycle Designer product used for authoring dynamic XML-based forms.

Why is this important? Adobe Systems, Inc., has spent much time, labor, and money on developing branding for their products. With the different changes to product names and the different components of the software, some people using the products don't completely understand the differences or where the product came from. An Adobe Reader installer can appear on CD-ROMs distributed legitimately by users, and some end users may not know that it is a product available for upgrading at the Adobe Systems, Inc., Web site. Therefore, using the formal name can help users understand a little bit more about the software.

And there's a very good reason for helping Adobe Systems with the recognition and marketing of its products. If the product doesn't do well in the marketplace, you might one day see it disappear. You won't want that to happen because when you start working with the new release, you'll easily see many great new features and much more polish added to the programs. Adobe Systems has done well in bringing the entire Acrobat family of products to maturity and I'm certain you'll find many more new uses for Acrobat.

Above all, realize that *Adobe* is not a product. Adobe or Adobe Systems is a company. Making a reference to Adobe when you mean Acrobat or Adobe Reader is improper and promotes confusion. When referring to the products, be certain to include Acrobat, Standard, or Reader.

Adobe Systems and the Acrobat mission

Adobe Systems, Inc. began as a company serving the graphic design and imaging markets. With the release of PostScript, its first product, much development in the early years of its history was devoted to imaging programs, font libraries, and tools to help service graphic design professionals. When you speak to graphic designers and advertising people, they connect Adobe Systems with products such as Adobe Photoshop, Adobe Illustrator, Adobe InDesign, Adobe Premiere, and so on. With some of these flagship programs having long histories and large installed user bases, some people may think that a product such as Adobe Acrobat takes a back seat to the high-end graphics and multimedia programs.

Where does Acrobat fit into Adobe's mission and view of its product line? Adobe Chairman and CEO Bruce Chizen has been quoted as saying that he expects the Acrobat family of products to weather economic storms in the software market. Acrobat is Adobe's fastest-growing product, experiencing between 40 to 60 percent growth in year-over-year sales. Chizen has also stated that more than 60 percent of Adobe's worldwide sales and marketing personnel are devoted to Acrobat-related products from the Acrobat 5 life cycle to the present.

Adobe sees Acrobat as an integral part of its future and is investing much energy into Acrobat's growth. With more than 750,000,000 installed users of the Adobe Reader software, Acrobat and the PDF file format are among the most popular software products available today.

Acrobat has become a standard in many different industries. In the publishing market many large newspaper chains, publishing houses, and book and magazine publishers have standardized on the PDF format for printing and prepress. The prepress industry has long adopted PDF as a standard for commercial and quick-print houses. Almost every software manufacturer includes last-minute notes, user manuals, and supporting information in PDF format on CD-ROM installer disks. The U.S. federal, state, and city governments and the U.S. government contractor organizations have standardized on PDF for everything from forms, applications, notices, and official documents to intra-office document exchanges.

With the introduction of the Acrobat 6 product line, Adobe Systems expanded existing markets and targeted new markets. The features in Acrobat 6 and 7 Professional appealed to all kinds of engineering professionals. With the support for layers and direct exports from programs such as Microsoft Visio and Autodesk AutoCAD, engineers, planners, and architects welcomed the new additions to Acrobat. Now in Acrobat 8, users of Acrobat Professional can convert AutoCAD .dwg drawings to PDF complete with layers and comments without having AutoCAD installed on a computer. Enterprises, in which document flows include different workgroups for almost any industry, welcomed additions to the comment and review tools in Acrobat Professional. Additional enabling usage rights for Adobe Reader users in Acrobat 8 are another great feature for knowledge workers. The already standardized prepress market applauded new features for printing to high-end imaging devices without the use of third-party plug-ins. Seamless integration of JDF job ticketing with Acrobat and Creative Suite is now available in Acrobat 8 and the CS applications 2.3 and greater for the creative pro market. All the great new features in Acrobat 6 and 7 have now been amplified in version 8, and you find additional support for users in almost every industry. New Redaction tools and Bates Numbering will be welcomed additions for the legal community. Also, concurrent to Acrobat development, the Acrobat 3D product is continuing to be expanded with new features to suit the manufacturing industry. The list keeps growing and Acrobat keeps improving.

PDF workflows

A workflow can mean different things to different people. One of the nice aspects of working with Acrobat is the development of a workflow environment. Quite simply, workflow solutions are intended to get out of a computer what the computer was designed for: productivity in a more automated and efficient fashion. Editing page by page and running manual tasks to change or modify documents could hardly be called workflow solutions. Workflows enable office or production workers a means of automating common tasks for maximum efficiency. Batch processing documents, running them through automated steps, and routing files through computer-assisted delivery systems are among workflow solutions.

Acrobat provides workflow solutions in almost every industry and new features added to Acrobat 8 add some polish to an already great product. But the real advance in workflow activity is the introduction of Acrobat Connect. Now, instead of having documents flow across wide area networks, people can connect through real-time online events. The introduction of Acrobat Connect will not only ease a tremendous financial burden saving companies huge expenses for employee travel, but increase productivity in workflows through dynamic interaction.

New Features in Adobe Acrobat Professional

The changes to Acrobat in version 8.0 represent many more expanded and new features to an already impressive product. Just about everything you could do in the last version is still available in version 8.0, but there have been many additions to existing features and some new options for a variety of Acrobat uses. The user interface has greatly changed over all previous versions of Acrobat, adding more tools and commands and features and much easier methods for accessing tools.

In each chapter I've added a special icon to point out new features. Some new chapters have been added to this version that deal exclusively or mostly with new features. Chapters 3, 12, 14, 19, and 29 cover new features in much detail. The remaining chapters all cover some new features added to Acrobat and respective to the chapter topic.

Part I

Welcome to Adobe Acrobat

IN THIS PART

Chapter 1
Getting to Know Adobe Acrobat

Chapter 2
Using Acrobat Viewers

Chapter 3
Getting Started in Adobe Acrobat

Chapter 4
Getting Familiar with Adobe Reader

Chapter 5
Viewing and Navigating PDF Files

Chapter 6
Searching PDF Files



Chapter 1

Getting to Know Adobe Acrobat

To start off this large book on Adobe Acrobat, let's first take a look at what Acrobat is and what PDF is, and let's try to get a grasp on some of the many options you have for working with PDF files in Acrobat.

What Is Adobe Acrobat?

Assuming you know little about Adobe Acrobat, I start with a brief description of what Acrobat is and what it is not. As I explain to people who ask about the product, I usually define it as the most misunderstood application available today. Most of us are familiar with the Adobe Reader software, which is a product from Adobe Systems Incorporated that you can download free from the Adobe Web site (www.adobe.com/acrobat/readermain.html). You can also acquire the Adobe Reader from all the installation CD-ROMs for other Adobe software. You can even acquire Adobe Reader from other sources, as long as the Adobe licensing requirements are distributed with the installer program. The Adobe Reader, however, is *not* Adobe Acrobat. Adobe Reader is a component of a much larger product family that has evolved through several iterations over more than a decade.

You're probably a little more sophisticated and realize there is a major difference between the applications noted previously and you may wonder why I even spend any time discussing the difference between Acrobat and Adobe Reader. Unfortunately, many people still believe that Adobe Acrobat is the free Adobe Reader program.

To add a little more confusion, Adobe continues to market several Acrobat products in the Acrobat family. While Adobe Reader remains a free download from Adobe Systems, there are three additional commercial viewers—Acrobat Standard, Acrobat Professional, and Acrobat 3D. With the release of Acrobat 8, Acrobat Standard is now offered only to Windows users, and has been dropped from the Macintosh version. As I talk about Adobe Acrobat in this chapter, and

IN THIS CHAPTER

About Adobe Acrobat

Understanding PDF

Understanding PDF standards

Taking a look at the new user interface

Looking at the Acrobat workplace

Getting help

About Preferences

throughout the book, I'm referring to Acrobat Professional for both Windows and Macintosh and Acrobat Standard for Windows users only. Where the two programs differ in features, I point them out. I also mention when a feature is only available in Acrobat Professional.

NOTE

There are distinctions between the Acrobat Standard product (Windows) and the Acrobat Professional product in terms of tools and commands. Most editing tasks can be handled in either viewer; however, Acrobat Professional does provide more editing features than Acrobat Standard. Throughout this book I delineate the differences and point out when an Acrobat Professional feature cannot be accomplished in Acrobat Standard.

Adobe Acrobat (either Standard or Professional) in version 8 is the upgrade from Adobe Acrobat 7 (Standard or Professional) and both viewers are the subject of the remaining chapters of this book. Acrobat is the authoring application that provides you tools and commands for a host of features outlined in the following chapters. If you haven't yet purchased a copy of Acrobat, either the Standard version (Windows only) or the Professional version (Windows and Macintosh), you might want to look over Chapter 2 and observe some of the comparisons between the viewers. If fewer tools and features suit your purpose, you might find the Standard version satisfactory — but remember, Acrobat Standard is available only on Windows in version 8. Although some of the features differ between the viewers, they both provide many features for editing, enhancing, printing, and working with PDF documents.

Acrobat is an authoring application but it has one little feature that distinguishes it from almost any other authoring program. Rather than starting from scratch and creating a new document in Acrobat, your workflow usually involves converting a document, created in just about any program, to a Portable Document Format (PDF) file. Once converted to PDF you use Acrobat to edit and refine the document, add bells and whistles and interactivity, or prepare it for professional printing. In addition to the Acrobat program, Acrobat Professional ships with companion programs such as Adobe Acrobat Distiller and Adobe Acrobat Catalog, and Adobe LiveCycle Designer (Windows only). Acrobat Standard ships only with Acrobat Distiller. These companion products are used to convert PostScript files to PDF, create search indexes, and author XML-based forms.

CROSS-REF

For information related to Acrobat Distiller see Chapter 10. For more information on Acrobat Catalog, see Chapter 6. For more information related to LiveCycle Designer, see Chapter 35.

Acrobat solutions are greatly extended with other supporting programs from Adobe Systems and many different third-party vendors. If Acrobat can't do the job, chances are you can find a plug-in or companion program to handle all you want to do with a PDF file.

CROSS-REF

For information related to Acrobat plug-ins and companion products see Chapter 2.

What Is PDF?

PDF, short for *Portable Document Format*, was developed by Adobe Systems as a unique format to be viewed through Acrobat viewers. As the name implies, it is portable, which means the file you create on one computer can be viewed with an Acrobat viewer on other computers, handheld devices, and on other platforms. For example, you can create a page layout on a Macintosh computer and convert it to a PDF file. After the conversion, this PDF document can be viewed on a Linux or Windows machine.

Multiplatform compliance (to enable the exchange of files across different computers, for example) is one of the great values of PDF documents.

So what's special about PDF and its multiplatform compliance? It's not so much an issue of viewing a page on one computer created from another computer that is impressive about PDF. After all, such popular programs as Microsoft Excel, Microsoft Word, Adobe Photoshop, Adobe InDesign, Adobe FrameMaker, and Adobe Illustrator all have counterparts for multiplatform usage. You can create a layout on one computer system and view the file on another system with the same software installed. For example, if you have Adobe InDesign installed on a Macintosh computer and you create an InDesign document, that same file can be viewed on a PC with InDesign running under Windows.

In a perfect world, you may think the capability to view documents across platforms is not so special. Document viewing, however, is secondary to document integrity. The preservation of the contents of a page is what makes the PDF so extraordinary. To illustrate, suppose you have an InDesign document created in Windows using fonts generic to Windows applications. After it's converted to PDF, the document, complete with graphics and fonts intact, can be displayed and printed on other computer platforms. And the other computer platforms don't need the fonts, graphics, or original authoring application to print the file with complete integrity.

This level of document integrity can come in handy in business environments, where software purchases often reach quantum costs. PDF documents eliminate the need to install all applications used within a particular company on all the computers in that company. For example, art department employees can use a layout application to create display ads and then convert them to PDF so that other departments can use the free Adobe Reader software to view and print those ads for approval.

The benefits of PDF viewing were initially recognized by workgroups in local office environments for electronic paper exchanges. Today users have much more opportunity for global exchange of documents in many different ways. As you look at Acrobat and discover some of the features available for document comment and markup, comparing documents, support for layered files (which adds much more functionality to Adobe Reader), and preparing PDFs for screen readers, you'll see how Acrobat and the PDF have evolved with new technologies.

CROSS-REF

The term "screen reader" is used extensively throughout this book. When you see a reference to "screen reader," I'm referring to either a hardware device or special software (JAWS, Kurzweil, and so on) used to convert visual information to audio format. For more information on screen readers and making documents accessible to the readers, see Chapter 25.

Document repurposing

The computer revolution has left extraordinary volumes of data that were originally designed to be printed on paper on computer systems. Going all the way back to UNIVAC, the number crunching was handled by the computer and the expression was the printed piece. Today, forms of expression have evolved to many different media. No longer do people want to confine themselves to printed material. Now, in addition to publishing information on paper, we use CD-ROMs, the Internet, file exchanges, and meeting sessions via the Internet between computers. Sometimes we use motion video, television, and satellite broadcasts. As high-speed access evolves, we'll see much larger bandwidths, so real-time communication will eventually become commonplace.

Technology will advance, bringing many improvements to bandwidth, performance, and speed. To enable the public to access the mountains of digital data held on computer systems in a true information super-highway world, files need to be converted to a common format. A common file format would also enable new documents to be more easily *repurposed*, to exploit the many forms of communication that we use today and expect to use tomorrow.

Acrobat Professional has added more tools for helping users repurpose documents. Tools for repairing problem files, downsizing file sizes, porting files to a range of different devices, and eliminating unnecessary data are part of the many features found in Acrobat Professional. In addition, the new PDF/A format available in Acrobat 8 is designed specifically for archiving documents. A standards committee has developed this format so documents viewed on computer systems 100 years from now will be compatible with future operating systems.

PDF and Adobe PostScript

The de facto standard for nearly all printing in the graphics industry has been Adobe PostScript. While PostScript is still the dominant printing language, this will slowly change because Adobe has recently announced support for PDF as the new print standard.

Okay, so how does PostScript relate to PDF? In the initial release of Acrobat, all PDF conversion began with a file that was created as a PostScript file. Users selected the Print command in an authoring program and printed the file to disk—thus creating a PostScript file. This file was then opened in the Acrobat Distiller program and Distiller converted the PostScript to a PDF.

Distiller is still a part of Acrobat. In some cases, creating a PDF from a PostScript file rather than through any of the many other means available may be preferable. It could be that you have a problem with exporting to PDF from a program, such as fonts not appearing embedded, or you may need to create a PDF for a special purpose such as printing and prepress. In such circumstances using Acrobat Distiller may be your best solution for generating a PDF document to properly suit the purpose.

CROSS-REF

For information related to printing PostScript files and using Acrobat Distiller see Chapter 10.

Printing to PostScript and opening PostScript files in Distiller is used much less today because now so many programs support PDF creation through one-button clicks or using the Save As command. However, many of these one-button clicks still use the Distiller application in the background to create the PDF file. You may not see Distiller launched when PDFs are created in the background, but the program is working away to convert your authoring application document to a PDF file.

PostScript can be a problem solver for you, and you may have an occasional need to use it even if your workflow does not require its use all the time. The more you know about PostScript and Acrobat Distiller, the more often you might be able to rescue problem files that don't seem to properly convert to PDF.

PDF versions

Acrobat is now in version 8. The version number indicates the number of releases of the product. PDF is a file format and with it you'll also find a version number. The PDF version relates to the specifications of the file format; for the end user it's usually not so important to understand all the specifications as much as it is to know what it does for you or what you can expect from it. If you create PDF documents for users of older Acrobat viewers and use the newer PDF format, your users may not be able to view your PDF files. Conversely, creating PDF files with the older version might prohibit you from using some newer features in the recent release.

PDF versions are typically referred to as Acrobat Compatibility. A PDF version 1.7 file, for example, is an Acrobat 8 compatible file. To understand how the PDF version relates to the Acrobat version, simply add the digits of the PDF version together. For example, PDF version 1.4 is Acrobat 5-compatible ($1 + 4 = 5$). PDF version 1.5 is Acrobat 6-compatible, and so on.

Each PDF version provides support for additional features. It's not as important to know all the features enabled by one version as it is to know which PDF version you need to use. For example, to optimize a PDF file for printing, you may need to use PDF version 1.3 (Acrobat 4-compatible). Or, if you want to embed movie files in a PDF, then you need to use an Acrobat 6-compatible file (PDF version 1.5). Or, you may want to add password security to a PDF that requires a newer Acrobat viewer to open a file using a password.

Rather than try to remember a long list of compatible features, you are generally informed when one PDF version is needed over another as you work through editing PDFs in Acrobat. In addition, when you know your user audience and the version of Adobe Reader or Acrobat that users have installed on computers, you'll know which Acrobat-compatible version of a PDF to create.

Understanding PDF Standards

PDF has been adopted as a standard file format in many industries, including engineering, legal, manufacturing, and prepress and printing. Even the United States Federal Government, has embraced PDF as a standard file format.

So what are *standards*? Without regulation and approved standards, the computer industry would be chaotic. Fortunately, an international committee known as the International Organization for Standardization (ISO) develops and approves standards for the technical industry. This international committee, an entity apart from Adobe Systems, has approved and developed substandards of the PDF format.

The PDF standards available now include the following:

- **PDF/X.** This standard is a subset of the PDF format used in the printing industry. PDFs meeting PDF/X compliance are typically reliable and, theoretically, can be accurately printed on almost any kind of PostScript device.
- **PDF/E.** This standard is a subset of the PDF format designed for engineers to insure that industrial designs and drawings comply with a PDF standard.
- **PDF/A.** This standard is a subset of the PDF format used for archiving documents. The standards committee wants to insure that the files you create today and save as PDF can be viewed by computers many years in the future. To do so, the PDFs you create for archival purposes can be saved as PDF/A documents.
- **PDF/UA.** Although, as of this writing, this subset of the PDF format is in an early draft stage, you may be hearing more about it in the near future — about one to two years from this writing. The goal of this proposed new standard is to provide universal access (UA) to all users including those persons working with assistive devices (see Chapter 25 for more on PDFs and assistive devices). The proposed new format is in the hands of the AIIMS Standards Board Committee that also proposed the PDF/X and PDF/A standards and submitted them to the ISO. People interested in participating on the committee can find more information at www.aiim.org/standards.asp?ID=27861.

Looking at the New User Interface

If you're an Acrobat user, the first thing you'll notice when you launch Adobe Acrobat 8 or Adobe Reader 8 is a new appearance for the user interface (UI). Many changes have been made to the Acrobat window, some

of which you may like and others you may not. I'll explain more about the user interface in later chapters where I discuss tools and viewing PDF documents. For now, let me share the reasons why Adobe has made the current significant changes to Acrobat 8.

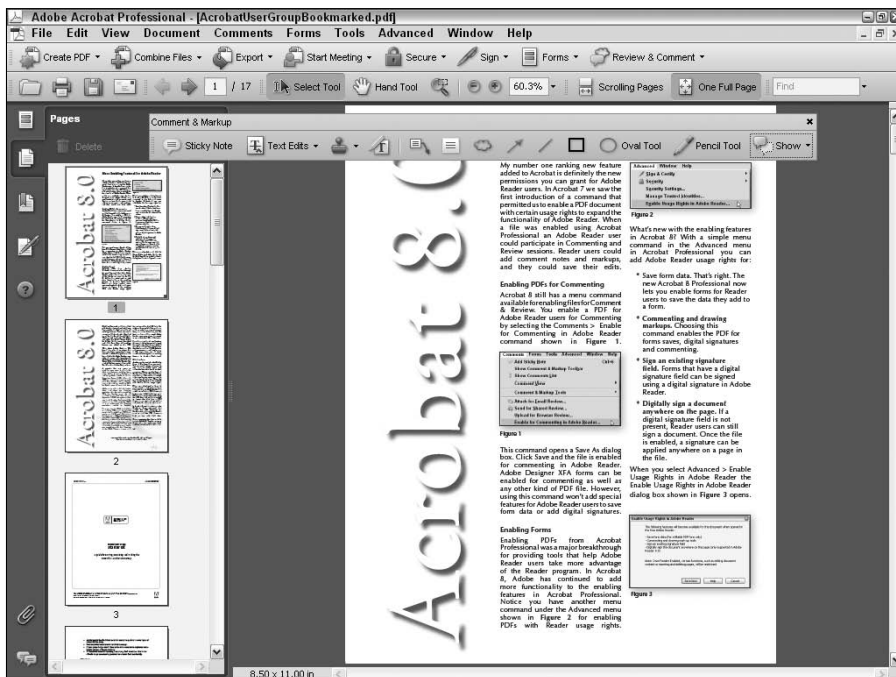
Adobe Systems is a company committed to user feedback and responding to user needs. Most often, we find changes being made in Acrobat, and all of Adobe's products, as the result of a demand by a significant number of users. For instance, you might wonder why a great feature is removed from one version of the product. The answer may simply be that a number of IT managers were struggling with a security loophole caused by the feature.

The change in Acrobat's user interface was made because of a large demand by enterprise users who want Acrobat to appear similar to other programs used, such as the Office products and Web browsers. You may not agree, but Adobe can only respond to the majority and the majority is asking for something similar to the look and feel of the current release.

Such changes require all of us to become familiar with some new ways to move around a document and become familiar with the way your documents appear in an Acrobat window. As you can see in Figure 1.1, the Acrobat workplace has changed appearance. For those familiar with earlier versions of Acrobat, you'll notice some obvious changes in the user interface.

FIGURE 1.1

The new Acrobat 8 user interface



- **Color Scheme.** The Acrobat window has changed color because many users want to have more emphasis on the document page and less on the Acrobat workspace. The contrast in color between the background Document pane color emphasizes document pages more when the pages are white. White is the most common page color used by most users.
- **Elimination of the Status Bar.** You'll notice immediately that the familiar Status bar in Acrobat 8 is now absent. This decision was made to provide more viewing area for document pages. If you like having tools previously found in the Status bar in view, don't worry. I'll explain how to create a Status bar look in Chapter 5.
- **Icons in the Navigation pane.** Another obvious change in the user interface is the appearance of icons in the Navigation pane at the far left side of the Acrobat window. Again, this change was made to provide users more space in a crowded window. In earlier versions of Acrobat, we saw names for the Navigation panels, such as Bookmarks, Pages, Security, Comments, Attachments, and so on. These names took up quite a bit of real estate especially if you loaded a number of additional Navigation panels made available by selecting View ⇨ Navigation Panels and selecting a panel from the submenu. After dragging a panel to the Navigation pane, the panels quickly begin to crowd the available space. By using icons, you can easily store more individual panels in the Navigation pane.

TIP

If you want to begin to associate the icons with the Navigation panel names, just open the View ⇨ Navigation Panels menu. All the Navigation panels are listed by icon and name, including the default Navigation panels you see when you first launch Adobe Acrobat.

- **Document windows with toolbars.** This user interface change was again made because of strong demand from users who wanted Acrobat to appear similar to other Windows and Macintosh programs. Although the view departs from Adobe's Creative Suite programs, Adobe found more users of Acrobat working in Microsoft Office and Internet Web browsers. Separate document windows with toolbars associated with each window was the demand and Adobe responded. You can choose in a preference setting whether to view PDF documents with or without toolbars attached to each document.

CROSS-REF

Additional UI changes are discussed later in Chapter 5, along with some workarounds if you happen to prefer the old Acrobat viewer look.

Acrobat Environment

Acrobat provides you with features such as menu commands, toolbars, and palettes to accomplish work for whatever goal you hope to achieve with PDF documents. When you launch the program you see many of these features in the Acrobat window. Just so you know what is being referred to when I discuss accessing a feature in Acrobat, take a look at Figure 1.2 to understand the names used to describe the various areas of the new Acrobat workplace.

- A **Title bar.** By default, the name of the file you open appears in the title bar. The title appearing in the title bar can change according to an option for displaying the Document Title in the Initial View properties.

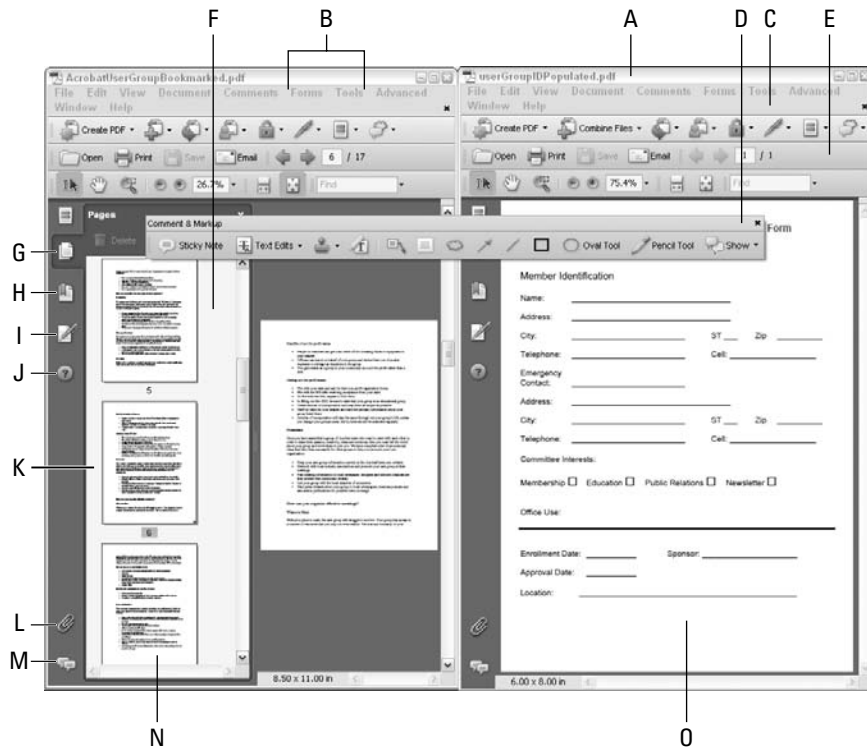
CROSS-REF

For information related to Initial View and displaying Document Titles, see Chapter 4.

- B Menu bar.** The menu bar contains all the top-level menu commands. These menu choices are also available from various actions associated with links and form fields when you choose the Execute a menu item command in the Actions Properties dialog box for links, form fields, and other features that permit associating an action with a command. When viewing files showing toolbars and menus for each open document, the Acrobat window appears as shown in Figure 1.2. This view can be toggled off in a preference setting.

FIGURE 1.2

The Acrobat Professional workplace contains menus, toolbars, and palettes.

**CROSS-REF**

For information related to link actions and the Execute a menu item command action type, see Chapter 22. For more information on actions with form fields, see Part VI. For making preference choices for viewing PDFs, see “Customizing the Acrobat Workplace” later in this chapter.

- C **Toolbars.** A number of individual toolbars are nested below the menu bar. When preferences are set to view toolbars attached to each open document, you'll see multiple sets of toolbars. Toolbars are marked with a vertical separator bar at the left side of the toolbar. This bar can be selected and dragged to move it out of the Toolbar Well.

CROSS-REF For information related to working with toolbars, see the "Tools and toolbars" section later in this chapter.

- D **Floating toolbar.** Toolbars can be opened by accessing the More Tools drop-down menu and selecting a toolbar name. When a toolbar is opened, it appears as a floating toolbar. Floating toolbars can be *docked* in the Toolbar Well.
- E **Toolbar Well.** The Toolbar Well houses the toolbars. You can drag toolbars away from the Toolbar Well or add other toolbars and expand the Toolbar Well to house your new additions. When you drag a toolbar away from the Toolbar Well, the toolbar is "undocked" and becomes a floating toolbar. When you drag a floating toolbar and drop it in the Toolbar Well, the toolbar becomes "docked."
- F **Palette pull-down menu.** Individual panels can be tucked away in the Navigation pane (see Navigation pane later in this list) or appear anywhere in the Acrobat window. Each palette contains its own menus accessible by clicking the down-pointing arrow. These menus are referred to as palette pull-down menus in all subsequent chapters.
- G **Pages panel.** When you open the Pages panel, you'll see thumbnail images of each page in your document and you'll find many page-editing features available to you from the Pages panel palette pull-down menu.

CROSS-REF For information related to using the many options available in the Pages panel, see Chapter 16.

- H **Bookmarks panel.** The second default panel appearing in the Navigation pane is the Bookmarks panel. If bookmarks are contained in the PDF document, they appear in the palette when the palette is open.

CROSS-REF For information related to creating bookmarks from authoring programs, see Chapter 9. For information related to creating and managing bookmarks in Acrobat, see Chapter 22.

- I **Signatures panel.** If digital signatures are included in your PDF document, they can be viewed in the Signatures panel.

CROSS-REF For information related to digital signatures, see Chapter 26.

- J **How To.** The How To pane has been moved in Acrobat 8 to the Navigation pane. In Acrobat 7, this pane appeared on the right side of the document window. The How To pane contains some help information related to many common PDF editing tasks. Users of previous versions of Acrobat will notice the How To pane has replaced the default appearance of the Layers pane.
- K **Page thumbnails.** When the Pages panel is opened, page thumbnails of all the document pages appear within the Pages panel.

- L **Attachments.** The Attachments pane is used to show all file attachments in a document.

CROSS-REF To learn how to use file attachments, see Chapter 12.

- M **Comments panel.** When you open the Comments panel, the display of comments and reviews is shown horizontally at the bottom of the Acrobat window.

CROSS-REF To learn how to use the Comments panel options, see Chapter 20.

- N **Navigation pane.** The Navigation pane can be expanded or collapsed. The view in Figure 1.1 is an expanded view where the Bookmarks panel is the active pane. To open the Navigation pane you can click a panel to display the respective information associated with that panel in the expanded palette window. Clicking again on the panel collapses the view. You can also use the keyboard shortcut F4 to expand and collapse the Navigation pane.
- O **Document pane.** The Document pane is the container for PDF files you see in Acrobat. When no file is open, the Document pane is empty. When you open a PDF document, the document appears in the Document pane.

For more detail on specific menu commands, tools, and palettes, see the related chapters to discover the different options available to you. All of the items discussed here are explained in more depth in subsequent chapters.

Menus

As with any program operating on a computer system that supports a Windows type of environment, you'll notice menu commands at the top level of the Acrobat window. Users of previous versions will notice that Acrobat 8 features an additional menu that contains commands specific to creating PDF forms. If at first glance you don't see an option you used in Acrobat 7, poke around the menus. None of the Acrobat 7 features have been eliminated; they may just be in a different place or referred to by a different name.

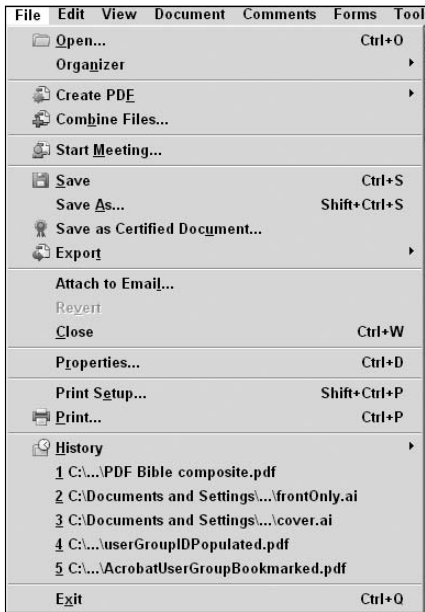
File menu

The File menu is where you open and close documents, create PDF files, import and export certain data, access print commands, and find some other nifty new additions in Acrobat. The Mac and Windows operating systems display recent files in different menus. On the Mac in OS X you'll find recently viewed documents by choosing File ⇨ Open Recent File. This command opens a submenu where you can access recent documents. On Windows, a list of the recently viewed documents is located at the bottom of the File menu, as shown in Figure 1.3.

CROSS-REF Note that a new menu command, **Start Meeting**, appears in the File menu. This command gets you started with Adobe Breeze as I explain in Chapter 29.

FIGURE 1.3

Recently opened files in Windows appear at the bottom of the File menu. Macintosh users can display a list of recently viewed files by choosing File ⇨ Open Recent File.

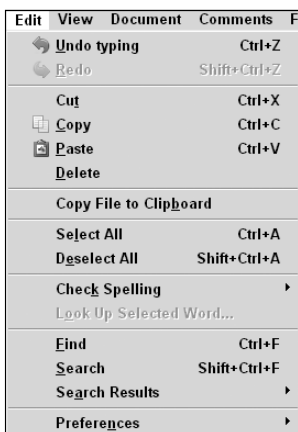


Edit menu

As shown in Figure 1.4, the traditional Cut, Copy, and Paste commands are located in the Edit menu along with other familiar commands from Acrobat 7. There are no changes to the Edit menu from Acrobat 7.

FIGURE 1.4

The Edit menu contains the same commands found in Acrobat 7.



View menu

The View menu (see Figure 1.5) contains all the commands you'll use for viewing PDF documents. An addition to the View menu is the Reading Mode command. This command dismisses the Navigation pane and appears similar to the display you see when reading articles. The Wireframe command has changed to Line Weights you see at the bottom of the menu.

CROSS-REF For more information on using Reading Mode, see Chapter 5.

Document menu

The Document menu (see Figure 1.6) contains a collection of commands specific to document handling. Options in the Document menu have a few changes in Acrobat 8 compared to the options in Acrobat 7. Notice a new command — Enable Features in Adobe Reader, which appears in addition to Enable for Commenting and Analysis found in Acrobat 7 and used to enable PDFs for commenting in Reader. This new command now enables you to add both commenting and saving from data in Adobe Reader. The Paper Capture command has changed names to Scan to PDF and a new command exists for optimizing scanned PDF files. The OCR feature in Acrobat remains the same and is all available in the Text Recognition submenu. In addition to these new commands, we find the Examine Document command and Manage embedded index appearing in Acrobat 8.

CROSS-REF For information related to enabling PDFs for form data saving, see Chapter 19 where all the enabling features are discussed. For more information on examining documents, take a look at Chapter 19. For more information on embedding index files, look to Chapter 6 where I talk about search indexes and searching PDF files.

FIGURE 1.5

The View menu contains commands for viewing PDF documents and navigating through pages and different PDF files.

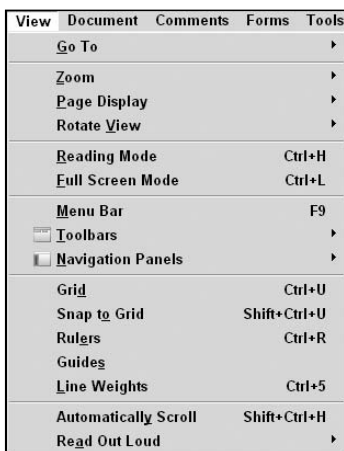
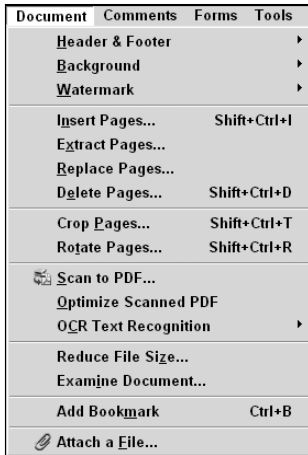


FIGURE 1.6

The Document menu reflects several changes in Acrobat 8.



Comments menu

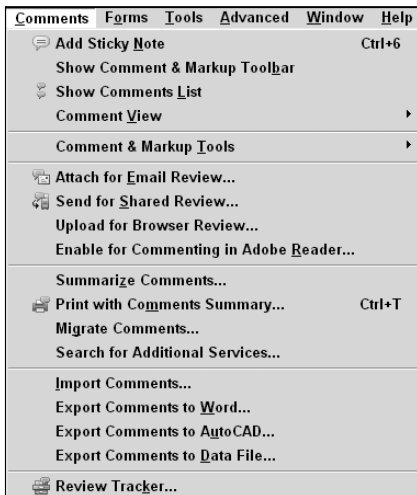
Some new menu commands in the Comments menu shown in Figure 1.7 include Send for Shared Review, Upload for Browser-Based Review, Search for Additional Services, and a number of different export commands for exporting comments to MS Word, AutoCAD, and to a data file.

CROSS-REF

For details on working with comment reviews, see Chapter 21. For import/export commands and all other commenting features, see Chapter 20.

FIGURE 1.7

The Comments menu offers commands specific to review and markups.



Forms menu

The Forms menu shown in Figure 1.8 is new to Acrobat 8. Here you'll find a number of different commands all used for working with PDF forms and Adobe Designer XML forms (Windows).

NEW FEATURE The new Run Form Field Recognition command is not only a special treat for forms designers, but it's one of the best new features added to Acrobat 8.

FIGURE 1.8

The Forms menu, new in Acrobat 8, contains commands specifically for working with forms.



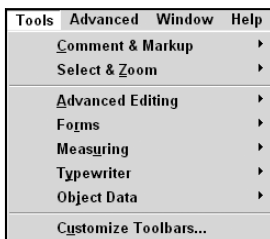
CROSS-REF For working with Acrobat PDF forms, see Chapters 33 and 34. For understanding more about Adobe Designer and XML forms (Windows only), see Chapter 35.

Tools menu

The Tools menu (see Figure 1.9) in Acrobat logically places access to many editing tools in a single convenient menu. You can access certain tools from the Acrobat toolbars (explained in the section “Tools and toolbars” later in this chapter) or you can use a context menu to access toolbars from the Acrobat Toolbar Well.

FIGURE 1.9

The Tools menu contains a collection of tools accessed from submenus. Select a tool group from the menu options to open a submenu.



Advanced menu

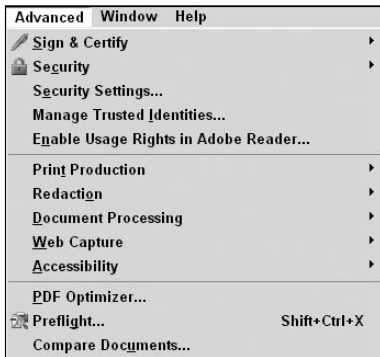
The Advanced menu (see Figure 1.10) contains a collection of menu commands considered to be advanced Acrobat features. A few of these tools are not available to users of Acrobat Standard such as Batch Processing, the new Redaction tools in Acrobat 8 Professional, and access to Acrobat Catalog. A few changes

have been made in this menu in Acrobat. You'll notice the Security commands have changed a bit and a new command exists for enabling PDFs with Adobe Reader usage rights. Also notice the Document Processing menu command. From the submenu you find many command that were positioned directly under the Advanced command such as Batch Processing, And JavaScript commands.

CROSS-REF For more information on using the Redaction tools, see Chapter 14.

FIGURE 1.10

The Advanced menu offers menu commands related to advanced editing features.



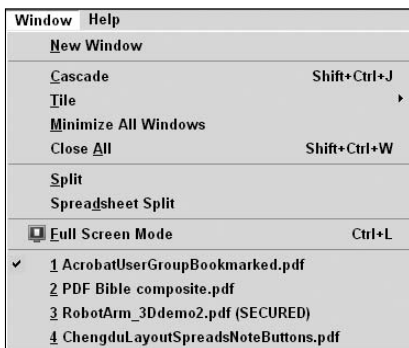
CROSS-REF For information related to Batch Processing, see Chapters 18 and 36. For information on using Acrobat Catalog, see Chapter 6. For information on using all the security commands see Chapter 26. For information on enabling PDFs with Adobe Reader usage rights, see Chapter 19.

Window menu

The Window menu (see Figure 1.11) provides menu commands to assist you in viewing documents.

FIGURE 1.11

The Window menu handles all the window views such as tiling, cascading, and splitting windows.



CROSS-REF For information related to window views and the split window views, see Chapter 5.

Help menu

The traditional help files added to your Acrobat folder at installation are found in the Help menu (see Figure 1.12). Various online help support is also located in this menu. You'll note that the Detect and Repair command found in earlier versions of Acrobat has changed to Repair Acrobat Installation.

CROSS-REF For information related to Help documents and Help menus, see the "Accessing Help" section later in this chapter.

Submenus

An extensive number of submenus appear in menus contained in the top-level menu bar and from many different tools contained in toolbars. Note that on individual toolbars you see a down-pointing arrow. Clicking the arrow opens a menu; some menus contain submenus. A submenu is denoted in Acrobat by a right-pointing arrow on the right side of a given menu command as shown in Figure 1.13. Select a command with one of these arrows adjacent to the command name and a submenu opens. In a few cases, you can find nested submenus where another right-pointing arrow may be visible in a submenu. If you want to access the second submenu, move the cursor to the menu option containing a right-pointing arrow. To make a selection from a submenu command, move the cursor to the desired menu command. When the menu command highlights, click the mouse button to execute the command.

FIGURE 1.12

The Help menu gives you access to Help information on selected topics as well as access to the complete Acrobat Help document.

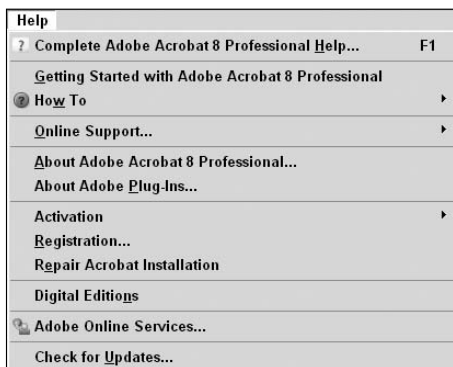
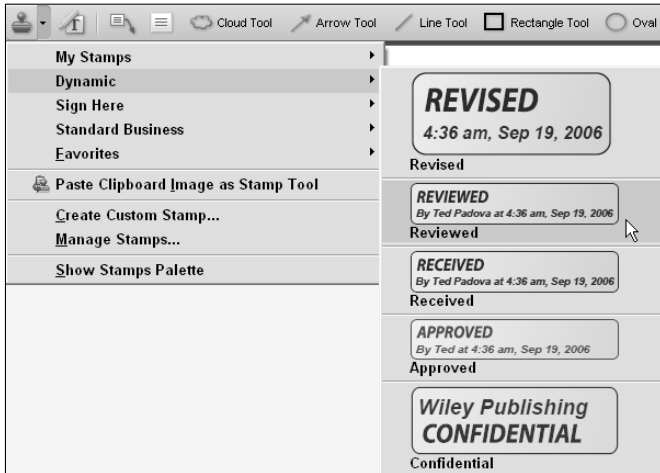


FIGURE 1.13

To access a submenu, move the cursor to the command containing a right-pointing arrow and slide the cursor over to the submenu options. Click the desired command in the submenu to execute the command.

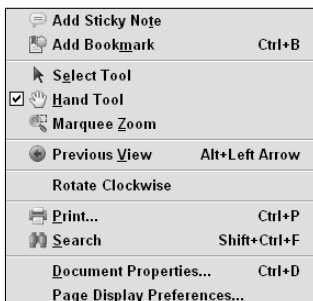


Context menus

Wherever you are in the Acrobat window—the toolbars, palettes, Document pane, or the Help menus—you can gain quick access to menu items related to your task by opening a context menu. Context menus pop up in an area where you either click the right button on the mouse or use an appropriate key modifier. In Windows, right-click the mouse button to open a context menu. On a Macintosh, when not using a two-button mouse, press the Control key and click the mouse button. Context menu options relate to the particular tool you have selected from a toolbar. By default the Hand tool is selected when you launch Acrobat and open a PDF document. When you right-click the mouse button (Windows) or Ctrl+click (Macintosh), a context menu pops up where you click the mouse as shown in Figure 1.14.

FIGURE 1.14

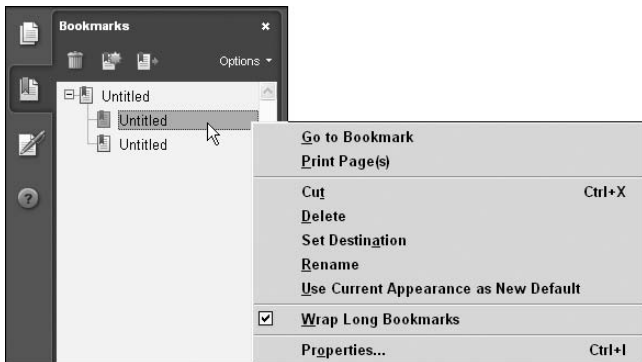
With the Hand tool selected, right-clicking (Windows) or Ctrl+clicking (Macintosh) the mouse button opens a context menu. From the menu, scroll the list and select the desired menu command.



If you change tools in a toolbar and open a context menu, the menu options change to reflect choices with that particular tool. Likewise, a context menu opened on a palette offers menu options respective to the palette, as shown in Figure 1.15.

FIGURE 1.15

When a palette is open in the Navigation pane and you open a context menu, the menu options reflect tasks you can perform respective to the panel.



TIP

Opening a context menu on one of the icons in the Navigation pane opens a menu where you can add or remove panels from the pane. Additionally, you can hide the Navigation panel icons by opening a context menu in the Navigation pane and select **Hide Navigation Pane Buttons**. To bring back the Navigation Pane Buttons, press **F4** on your keyboard or select **View** ⇨ **Navigation Panels** ⇨ **Show Navigation Pane**.

Context menus are a great benefit during your Acrobat sessions and using them helps you work much faster. Throughout this book I often make references to the different choices you have in selecting a tool or command. In most incidences, you find mention of context menus. Be certain you know how to open a context menu in Acrobat on your computer. For the remainder of this book, I'll mention opening context menus without walking through the steps for how to open the menu.

Keyboard shortcuts

Pressing one or more keys on your keyboard can also open menus and invoke different commands. When you become familiar with keyboard shortcuts that perform the same function as when using a menu or context menu, you'll find yourself favoring this method for making different menu selections or grabbing a tool from a toolbar. Fortunately, you can learn as you work when it comes to memorizing keyboard shortcuts. As I'm certain you know, several shortcut combinations are noted in menu commands. You can learn these shortcuts when you frequently use a particular command. However, the keyboard shortcuts you see in the menu commands are just a fraction of what is available in Acrobat for quick access to commands and tools. For a complete list of all keyboard shortcuts, look over the Complete Acrobat help document you open by selecting **Help** ⇨ **Complete Acrobat 8.0 Help**.

NOTE

Pressing a single key to access a tool requires you to have your Preferences set to accept single keystroke shortcuts. See the steps for "Setting up the Acrobat environment" later in this chapter for the proper Preferences settings.

Tools, task buttons, and toolbars

Tools are grouped together in separate toolbars in the Toolbar Well below the menu bar. The default view when you launch Acrobat contains several toolbars visible in the Toolbar Well. You can remove various toolbars from the Well, move them around the Acrobat window, close them, and add different toolbars to the Toolbar Well.

NEW FEATURE In addition to loading and unloading toolbars, a new feature in Acrobat 8 permits you to add or remove individual tools from any toolbar. Before you learn how to add and remove individual tools, let's first take a look at the Toolbar Well.

The Toolbar Well, where the toolbars are contained, is collapsed and expanded according to the number of toolbars you add to it. When a toolbar is contained within the Toolbar Well, it is said to be *docked*. When a toolbar is dragged away from the Toolbar Well and rests atop the Acrobat window, it is said to be *undocked* and appears as a *floating* toolbar.

Task buttons

One of the many different toolbars in Acrobat is called the Tasks toolbar. This toolbar houses various Task buttons. In Figure 1.16 the tasks toolbar is shown with the label descriptions to describe each tool's purpose. Task buttons differ a little from other tools in that they all support pull-down menus where menu commands related to specific tasks are addressed.

FIGURE 1.16

The Tasks toolbar contains several Task buttons all containing pull-down menus.



The Tasks toolbar features commands for creating PDFs, working with comments and reviews, exporting PDFs to different formats, securing PDFs, working with forms, and digitally signing PDFs. The Tasks toolbar also features the new Task button containing commands for engaging in Acrobat Connect meetings. You'll find all these features covered in many of the following chapters.

Loading and unloading tools

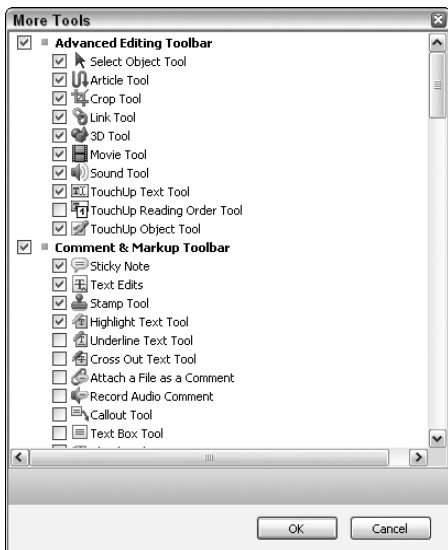
The default tools you see in the Toolbar Well when you first open Acrobat is but a mere fraction of all the tools available to you. Fortunately in Acrobat 8, a nifty new window has been added to the program to help you easily manage tools.

It's important to realize that you have toolbars and tools. Tools appear as individual icons contained in a given toolbar. You can choose to show only one tool in a toolbar or all the tools that belong to a given toolbar and anything in between. The tools within toolbars can be added and deleted from the parent toolbar.

If you're familiar with earlier versions of Acrobat and you don't find tools loaded in the various toolbars, your first stop is to open the More Tools menu at the top right corner of your screen. Select More Tools from a context menu opened on the Toolbar Well and the More Tools window opens as shown in Figure 1.17.

FIGURE 1.17

Open the More Tools window to show/hide tools in toolbars.



Place a check mark beside any tool to be shown in a toolbar docked in the Toolbar Well or opened as a floating toolbar. Figure 1.17 shows you a small portion of available tools that appear in a scrollable window.

NOTE

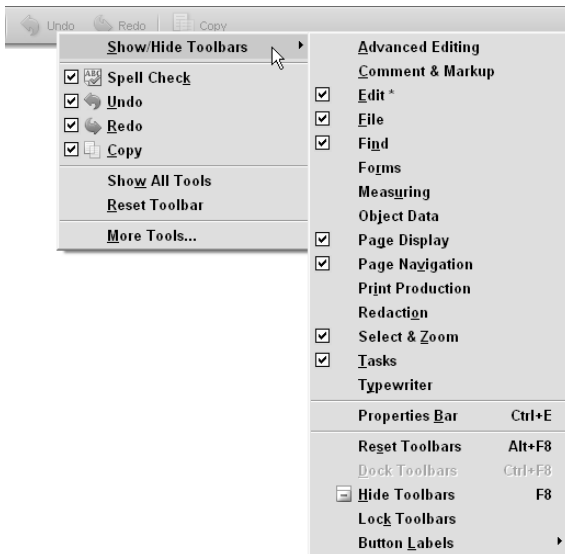
Toolbars themselves can be shown or hidden using the More Tools window. If you remove a check mark adjacent to a toolbar name to hide the toolbar, the toolbar and all the tools are hidden, even if the individual tools are all checked.

Yet another way to add and remove tools to and from toolbars is to simply open a context menu on a toolbar. Right-click (Windows) or Ctrl+click (Macintosh) on a toolbar either docked in the Toolbar Well or as a floating toolbar and a pop-up menu provides options for adding or removing tools to/from that toolbar group.

In Figure 1.18 a context menu is opened on the Edit toolbar. When Show/Hide Tools is selected a sub-menu displays all toolbars. Select an item unchecked to open the respective toolbar or select a checked toolbar to remove hide it. Note that hiding a toolbar is temporary and only hides the toolbar from view in the Toolbar Well.

FIGURE 1.18

Open a context menu on a toolbar and select Show/Hide Toolbars to open a submenu where all toolbars can be opened or temporarily closed.

**TIP**

If you want all tools within a given toolbar to be shown, select Show All Tools in the context menu.

The Show/Hide menu command in the context menu shown in Figure 1.18 provides the same commands you have available in the View ⇄ Toolbars submenu. Either of these menus provides you a quick and easy way to show and hide toolbars.

The last menu item in the context menu shown in Figure 1.18 is used to open the More Tools window where you can add/remove tools among all toolbars.

Default toolbars

When you launch Acrobat for the first time or you set the toolbars to the default view, six different toolbars are docked in the Toolbar Well, including the Tasks toolbar discussed earlier in this section. The remaining default toolbars include:

- File toolbar.** These tools are used for general document handling. The default File tools activate commands for Open, Save, Print, and Email. When all the tools are loaded in the File toolbar the Create PDF from web page and Attach a File tools are added to the toolbar. In Figure 1.19 the default File toolbar appears on the left and the expanded File toolbar showing all tools appears on the right.

FIGURE 1.19

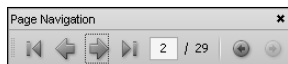
The File toolbar contains tools for document handling, such as opening PDF documents, saving documents, and printing files.



- Page Navigation toolbar.** The default tools in the Page Navigation toolbar shown on the left in Figure 1.20 contain tools for moving back and forth between PDF document pages. The numbers indicate what page you are currently viewing out of the total number of pages in the document. When the toolbar is expanded to show all tools as you see on the right in Figure 1.20, the First Page, Last Page, Previous View, and Next View tools are shown.

FIGURE 1.20

The Page Navigation toolbar, as the name implies, contains tools for navigating document pages.



- Page Display toolbar.** The Page Display toolbar is the home of many different tools used for page viewing, but only two of the tools appear in the default toolbar as shown in Figure 1.21 on the left. When you first open Acrobat, you see the Scrolling Pages and One Full Page tool. After expanding the toolbar to show all tools as shown on the right in Figure 1.21, the Single Page Continuous, Single Page, Two-Up, Two-Up Continuous, Full Screen Mode, Rotate Counterclockwise, Rotate Clockwise, and Line Weights tools are shown. Users of earlier versions of Acrobat will note that the tool names for Single Page, Continuous, Continuous – Facing, and Facing Pages have changed names to Single Page, Single page Continuous, Two-Up Continuous, and Two-Up respectively. In addition, these four tools previously appeared in a Status bar at the bottom of the Acrobat window in earlier versions of Acrobat. In Acrobat 8, the Status bar has been eliminated and all tools appear at the top of the Acrobat window.

FIGURE 1.21

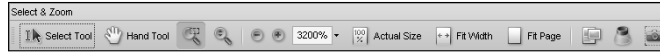
The Page Display toolbar contains many tools used for page viewing.



- Select & Zoom toolbar.** The tools in this group are used to select text/images, move the page in the Document pane, and zoom in and out of pages in the Document pane. The left side of Figure 1.22 shows the Select tool followed by the Hand tool then the Zoom Out, Zoom In, and Zoom Value tools. When all tools are loaded the Actual Size, Fit Width, Fit Page, Pan & Zoom Window, Loupe tool, and Snapshot tool appear as shown in Figure 1.22 on the right.

FIGURE 1.22

Select & Zoom tools are used to select text/images, move a document around the Document pane, copy selections, and view the document page using a number of different zoom tools.



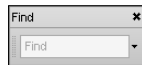
- **Find toolbar.** Of all the default toolbars, the Find toolbar shown in Figure 1.23 is the only one that does not have additional tools that can be added to the toolbar. However, a pull-down menu exists for making choices to refine your search for words in an open PDF document.

CROSS-REF

For more information on searching PDFs, see Chapter 6.

FIGURE 1.23

The Find toolbar is used for searching words in a PDF document.



Managing default toolbars

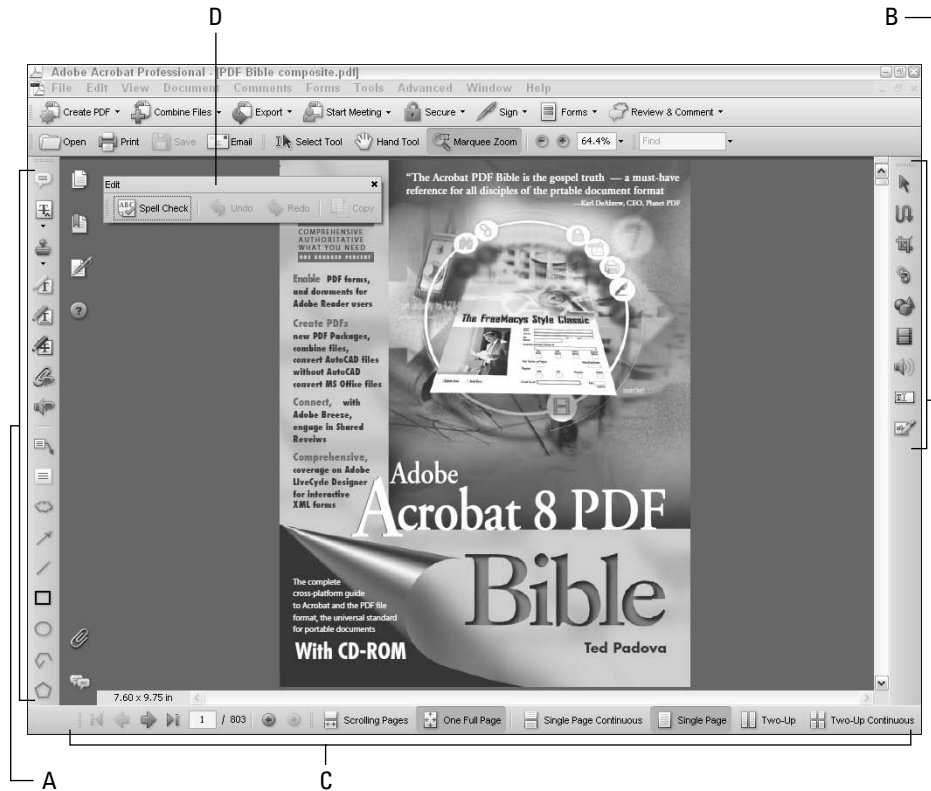
In addition to loading and unloading tools within toolbars, the toolbars can be moved, docked, and undocked from the Toolbar Well. Here's a list of some of the things you can do with the default toolbars and any other toolbars you decide to view:

- **Undocking toolbars.** Toolbars can be relocated from within the Toolbar Well to another area within the Acrobat window. For example, you might find it more convenient to move a toolbar you frequently access during an editing session so it is positioned at the bottom of the Document pane. If so, just place the cursor on top of the vertical separator bar adjacent to the first tool in a toolbar and drag it away from the Toolbar Well. This vertical line is the *hot spot* used to select the toolbar instead of a tool in the group. Clicking anywhere else in the toolbar selects a tool.
- **Docking toolbars.** To dock a toolbar back in the Toolbar Well once removed, drag the toolbar, again by the vertical separator bar adjacent to the first tool, on top of the Toolbar Well. The toolbar snaps to an available position in the Well. If you drop the toolbar between two other toolbars, the toolbar you relocate back to the Toolbar Well snaps in position between the two docked toolbars.

Toolbars can also be docked vertically on the left and right sides of the Document pane and at the bottom of the Acrobat window below the status bar. For example, if you drag a toolbar to the left of the Navigation pane and release the mouse button, the toolbar snaps to a docking station and the tools display vertically. In Figure 1.24 you can see toolbars docked on the left (A), right (B), and bottom (C) of the Acrobat window with one floating toolbar (D) in the Document pane.

FIGURE 1.24

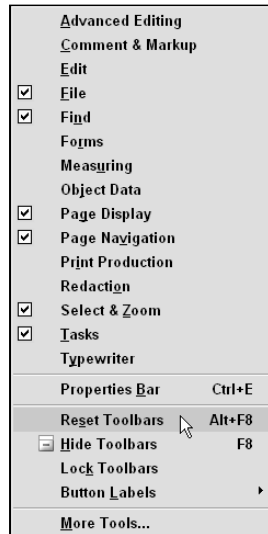
Toolbars can be docked on all four sides of the Acrobat window and undocked from the Toolbar Well where they appear as floating toolbars.



- Resetting toolbars.** You can position toolbars around the Acrobat window and return them to the default positions with one menu command. This is particularly helpful if multiple users work on a single computer or you frequently change editing tasks that require using different tools during different editing sessions. In many cases it's easier to reset toolbars to the original default view, than open tools needed for a specific editing task. To set toolbars to their defaults, open a context menu from any toolbar or in the Toolbar Well by right-clicking (Ctrl+clicking on Macintosh), and select the menu item Reset Toolbars as shown in Figure 1.25. Alternately, you can press Alt/Option+F8.

FIGURE 1.25

To return toolbars back to the default view, open a context menu from any toolbar or in the Toolbar Well and select Reset Toolbars.



- **Hiding all toolbars.** Toolbars can be hidden from view to offer you more room when editing a PDF document or browsing the contents of PDFs. To hide the toolbars from view, open a context menu from the Toolbar Well and choose Hide Toolbars. When toolbars are hidden you won't have access to a context menu to get the toolbars back in view. Instead, choose View ⇄ Toolbars ⇄ Show Toolbars to make all toolbars reappear. (Note that using this menu command also hides toolbars.)
- **Hiding a single toolbar.** You can hide a toolbar after it has been undocked from the Toolbar Well. Click the X in the top-right corner of the toolbar (Windows) or the small circle on the top-left side of the toolbar (Macintosh) to close it, and it disappears from view. From a context menu opened on any toolbar or the Toolbar Well, you can open the toolbar and display it in the Acrobat window again. Toolbars can also be hidden by using the More Tools window, opening a context menu on the Toolbar Well and selecting a toolbar with a check mark to hide it, and selecting toolbars in the View ⇄ Toolbars submenu.
- **Locking toolbars.** The vertical separator bar used to move toolbars disappears when you select Lock Toolbars from a context menu. The toolbars cannot be inadvertently moved after you lock them. To unlock the toolbars, open a context menu and select Lock Toolbars again. The check mark alongside the menu command becomes unchecked and the toolbars are unlocked in the Toolbar Well. If the toolbars are locked and you drag an undocked toolbar on top of the Toolbar Well, it won't dock. You need to first unlock the toolbars before you can redock them. Additionally, you need to unlock toolbars in order to use the Reset Toolbars command in a Toolbar Well context menu to return tools and toolbars back to the default position.

NOTE

You can also lock toolbars that are undocked outside of the Toolbar Well. The separator bar on the toolbar disappears on floating toolbars the same as it does for toolbars docked in the Toolbar Well. However, locking undocked toolbars does not prevent you from moving them around the Acrobat window. You can click and drag the title bar for any undocked toolbar and move it to another location.

- **Setting new toolbar defaults.** If you decide to reposition your toolbars and want to keep them fixed as new defaults, Acrobat can do so for you automatically. Move the toolbars to the desired locations and go about your work. When you quit Acrobat and reopen the program, the toolbar positions remain as you last arranged them. Unfortunately, Acrobat does not have a Save Workspace command like you find in several Adobe Creative Suite applications.

TIP

If you are unfamiliar with many Acrobat tools, you can change the tool labels to show you a more descriptive label for each tool that offers you a hint of what the tool does. To show more descriptive labels, open a context menu on the Acrobat Toolbar Well and choose Show Button Labels ⇨ All Labels. The toolbars expand and show a text description for each tool's name. Keep this option active until you are familiar with the tool names.

Understanding advanced toolbars

The default toolbars represent a fraction of the tools available to you in Acrobat. Many of the other toolbars remain hidden from view. The reason for this is obvious when you load all the toolbars in the Toolbar Well. You lose a lot of viewing real estate when all toolbars are docked in the Toolbar Well. Unless you have a large display monitor or a second monitor, working on a file in the Document pane when all toolbars are in view gives little room to see document pages. Fortunately, by managing the toolbars you can elect to show only the tools you want to work with and you can move them around the Acrobat window, allowing for the best view.

You open toolbars from menu commands in the Tools menu or by opening a context menu. If you're a seasoned Acrobat user, your first encounter with Acrobat viewers 6 and above might be a bit frustrating if you don't know how to access the tools you want to use. "Where is that Form tool?" you may ask. Don't worry; it's there. You just have to poke around and search for it or, better yet, look over the following descriptions to understand more about how these other tools are grouped into separate toolbars.

Opening advanced toolbars

For the purpose of discussion, I'll refer to the non-default toolbars as advanced toolbars. Acrobat does not refer to all these tools as advanced tools. Some of the tools labeled in the menu commands are not referred to as advanced tools. For clarity in this chapter, though, consider all the following toolbars as advanced toolbars.

You can use three methods for displaying toolbars not visible when you open Acrobat. You can open the View ⇨ Toolbars menu where you find a list of tools in submenus. Select a submenu item to open a toolbar as a floating toolbar in the Acrobat window. Another method is to open a context menu on the Toolbar Well and open toolbars from commands in the menu. A third option, and one that provides more options for viewing all tools and toolbars in a single window, is to use the More Tools menu command when you open a context menu on the Toolbar Well. As a matter of routine, you should use this option when preparing an Acrobat session that requires you to use several tools and toolbars. All tools except the Form tools (Acrobat Professional only) are accessible from the context menu.

Advanced Editing toolbar

The Advanced Editing toolbar shown in Figure 1.26 is one you'll use in just about all Acrobat editing sessions. Tools include the Select Object tool that is used to select content you add in Acrobat such as

comment markups and form fields. The Article tool is used to create article threads, the Crop, Link, 3D, Movie, and Sound tools follow. The TouchUp Text tool is used to edit text on a page and the last tool is the TouchUp Object tool that is used to select content that was originally created in an authoring program and converted to PDF.

CROSS-REF For more information about PDF editing using the Advanced Editing tools, see the chapters in Part III. To learn more about the Link tool, see Chapter 22. For using the Movie and Sound tools see Chapter 23. To learn how to use the TouchUp Order tool that follows the TouchUp Text tool, see Chapter 25.

FIGURE 1.26

The Advanced Editing toolbar contains a miscellaneous group of tools used for many different editing functions.



Comment & Markup toolbar

When you open either the View ⇨ Toolbars submenu menus or a context menu on the Toolbar Well, the first menu option after the default Advanced Editing toolbar is the Comment & Markup toolbar. Select the menu option and the Comment and Markup tools open in their own toolbar. Open a context menu on the toolbar and select Add/Remove Tools ⇨ Show All Tools. The toolbar appears as you see in Figure 1.27 when all tools are loaded.

FIGURE 1.27

Open the Comment & Markup toolbar and open a context menu on a tool and select Show All Tools to see all the comment and markup tools.



NEW FEATURE Now in Acrobat 8 you have the opportunity to load just the tools you want to use in a review session from both the former Commenting and the Drawing & Markup toolbars. Acrobat 8 nests all these tools together nicely in a single toolbar. This arrangement affords you the opportunity to view just those tools you commonly use in a review session — a great new feature. I won't go into all the tool names and explain their use now. You'll find a complete description in Chapter 20.

TIP

When you select the Comment & Markup tools from the More Tools window and check the boxes for all tools, all the tools are loaded *except* the Paste a copied image as stamp tool. To show the tool in the Comment & Markup toolbar, open the Comment & Markup toolbar and open a context menu on any tool in the toolbar. Select Show All Tools and the Paste a copied image as stamp tool is added to the toolbar.

Edit toolbar

The Edit toolbar is the home of a miscellaneous group of editing tools, such as spell checking, copy, paste, undo, and redo. (See Figure 1.28.)

FIGURE 1.28

The Edit toolbar contains a miscellaneous selection of tools used for spell checking and editing.



Forms toolbar (Acrobat Professional only)

From a context menu in the Toolbar Well or the View ⇨ Toolbars submenu select Forms toolbar to open the Forms tools. The eight forms tools shown in Figure 1.29 opens where you can access tools to create form fields.

NEW FEATURE In addition to the same form tools you had available in Acrobat 7, a new tool is added to the toolbar to create bar code fields. In addition two other new tools are added to the Forms toolbar. The Edit Layout tool changes from a preview mode to a form editing mode and the Distribute tool used to distribute forms for an ad hoc data collection and enable the distributed forms for Adobe Reader users.

FIGURE 1.29

To access the Forms toolbar, open a context menu on the Toolbar Well and select Forms.



CROSS-REF For more information on using the Forms tools and the new tools added to Acrobat 8, see Chapters 33 and 34.

Measuring tools

The Measuring tools include the Distance tool used for measuring linear distances, the Perimeter tool for measuring linear distances of angles and objects, and an Area tool for measuring the surface area of objects. The Measuring toolbar, shown in Figure 1.30, might be used for examining measurements in engineering and scientific drawings.

CROSS-REF For more information about using the Measuring tools, see Chapter 24.

FIGURE 1.30

The Measuring toolbar offers three tools to measure distances and areas on a PDF page.



Object Data tool

The Object Data tool (see Figure 1.31) is used to select objects on a document page. When you select an object that has object data associated with it, the Object Data dialog box opens. This dialog box contains object metadata such as creation date, copyright information, color mode, resolution, and other file attributes similar to the kind of metadata you can view in programs such as Microsoft Visio, Microsoft Project, and Autodesk AutoCAD.

FIGURE 1.34

The Typewriter tool is used primarily for filling in forms that don't contain form fields.

**CROSS-REF**

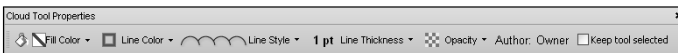
For more information on using the Typewriter tools, see Chapter 33.

Properties Bar

You use the Properties Bar (see Figure 1.35) in conjunction with several different tools. After you create comments, links, buttons, and similar content in a PDF document, the selected comment, link, button, and so on displays current properties such as colors, fonts, and line weights in the Properties Bar. You can make changes in the Properties Bar without visiting the Properties dialog box. You can quickly open the Properties Bar with a keyboard shortcut (Ctrl/⌘+E) or via a context menu opened on the Toolbar Well.

FIGURE 1.35

The Properties Bar offers a quick solution for editing item properties without the need for opening dialog boxes.

**Customizing the Acrobat workplace**

Whether you're an Acrobat pro or a new Acrobat user, seeing all those toolbars loaded and scattered across the Toolbar Well the first time can be very intimidating. As you poke around and possibly feel a little frustration when trying to identify the right tool icon to select the right tool for the task at hand, please realize that Acrobat is a multifaceted program serving a huge array of needs for different users. Not all the tools and features are designed for use in a single Acrobat session. You may be a PDF forms author and need only Basic tools, Navigation tools, Edit tools, and Form tools. In another session you may be a reviewer and only have need for the Comment and Markup tools. You might be an eBook author and need to work with many features for creating and viewing eBooks, or you might want to edit PDF pages and post modified PDFs on your Web site.

When learning all the tools and commands contained in Acrobat Professional, be certain to look over all the chapters where tools are discussed. Learn how to access toolbars and organize them in the Toolbar Well. When you begin a new Acrobat session, set up your environment so you can easily select a tool from toolbars you dock in the Toolbar Well.

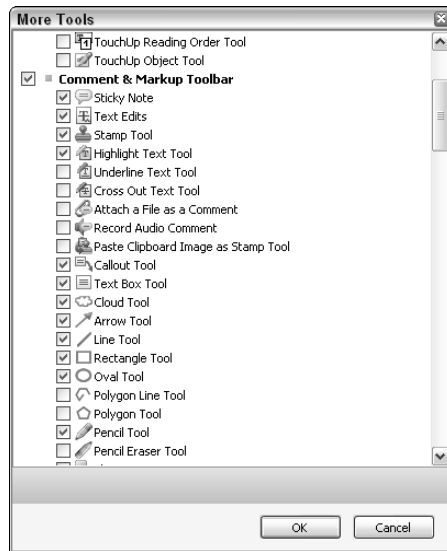
As a starting point, you can configure Acrobat to provide you with immediate feedback related to tools selection and keyboard shortcuts. As you first start using Acrobat Professional, follow the steps in the next section to help you customize your environment for more efficient editing and less frustration. In this example, an environment for engaging in a commenting session is used. You can change the toolbars to meet needs in PDF editing or PDF creation, or add tools for some other kind of work you do.

STEPS: Setting up the Acrobat environment

1. **Return to toolbar defaults.** Open Acrobat. Position the cursor on any area in the Toolbar Well and right-click to open a context menu (Ctrl+click for Macintosh) and select Reset Toolbars.
2. **Open the More Tools window.** Open the More Tools menu. From a context menu opened from the Toolbar Well, select More Tools to open the More Tools window.
3. **Add the tools you intend to use to the Comment & Markup toolbar.** This is a personal choice. Look over all the Comment & Markup tools and check just those tools you intend to use. Be certain to check the box for the Comment & Markup toolbar so the toolbar shows up when you leave the More Tools window. (See Figure 1.36.)

FIGURE 1.36

The More Tools window

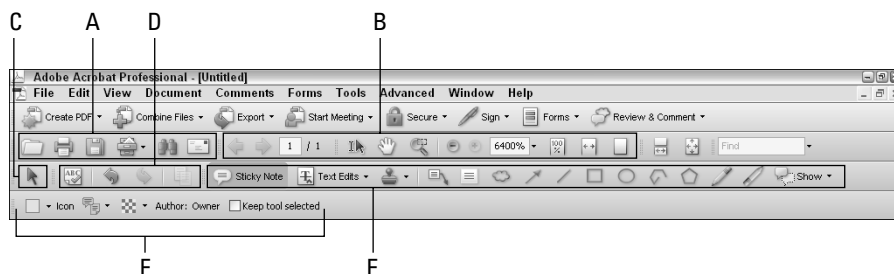


4. **Add some Edit tools.** While still in the More Tools window, scroll to the Advanced Editing Toolbar. One tool you'll use frequently in almost all editing sessions is the Select Object tool (denoted with an arrowhead icon). Click the check box for this tool. Other tools won't be used under most circumstances such as the Movie tool, Article tool, Link tool, and so on. Uncheck all the tools you anticipate not using.
5. **Add the Spell Check tool.** Scroll to the Edit toolbar and check the Spell Check tool.
6. **Exit the More Tools window.** When certain about the tools you think you'll use in a given editing session, click OK and all the toolbars open as floating toolbars.
7. **Open the Properties Bar.** Again open a context menu on the Toolbar Well and select Properties Bar from the menu options. Note that this tool is not available in the More Tools window and needs to be opened from a context menu or the View ⇨ Toolbars submenu.

8. **Dock the toolbars.** After opening all the toolbars you want to use for a given editing session return to the Toolbar Well context menu and select Dock All Toolbars. This command moves all the toolbars to the Toolbar Well, as shown in Figure 1.37.

FIGURE 1.37

Toolbars docked in the Toolbar Well include the A) File toolbar, B) Select & Zoom toolbar, C) Advanced Editing toolbar, D) Edit toolbar, E) Comment & Markup toolbar, and F) the Properties Bar.

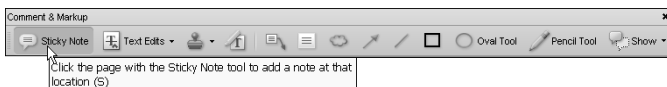


Tool Tips

When you select All Labels from a context menu or preference setting, you see tool descriptions on many tools. However, not all tools describe the tool with a label. For example, look at the Zoom In tool (the plus symbol). It should be apparent to you what the tool does by viewing the icon in the toolbar. Other tools' functions, however, may not be so apparent from viewing the tool icons. Fortunately, you have some extra help in the form of Tool Tips. To view a Tool Tip, place the cursor over a tool in the Toolbar Well or on a floating toolbar, and pause a moment before selecting the tool. A Tool Tip appears inside a yellow box directly below the cursor with a label describing the tool. In Figure 1.38 you can see the Tool Tip that appears when the cursor is placed over the Sticky Note tool. As you move the cursor over different tools, the Tool Tips change to reflect the description of the targeted tool.

FIGURE 1.38

Place the cursor over a tool and pause a moment before selecting the tool. A Tool Tip describing the tool opens below the mouse cursor.



As you become familiar with the tools, you can return to the context menu opened from the Toolbar Well and choose Button Labels ⇨ No Labels. When No Labels is active, your toolbars shrink and offer you more room in the Toolbar Well.

Palettes

Other tools available to you in all Acrobat viewers are *palettes*. Palettes are similar to toolbars in that they can be docked to a docking station called the Navigation pane; they can be undocked and floated around the Acrobat window; they can contain pull-down menus for selecting more options; a series of default palettes appears docked in the Navigation pane; and you can open additional palettes from menu commands.

A couple distinctions between toolbars and palettes are that palettes can be placeholders for information, and tools can appear inside a palette. Whereas tools are used in the Document pane, many palette operations take place directly in the palette. Toolbars remain relatively fixed in size, but palettes can be sized and stretched along the Acrobat window to provide you with more room to work within the palette or view the information contained within the palette. In addition, some palettes contain their own tools where edits can be made in the palette and dynamically reflected on the document page. Palettes help you organize content, view specific content across many pages, and provide some tools for global editing of PDF files.

Default palettes

As with toolbars, Acrobat displays a series of palettes docked in a well when you first launch the program. Palettes are contained in the Navigation pane along the left side of the Acrobat window. By default, the Navigation pane is collapsed; however, you can save PDF documents in such a manner where a palette expands when a file is opened in any Acrobat viewer. These settings are document-specific and can be toggled on or off for individual PDF documents.

CROSS-REF

For more information about setting opening views for palette displays, see Chapter 4.

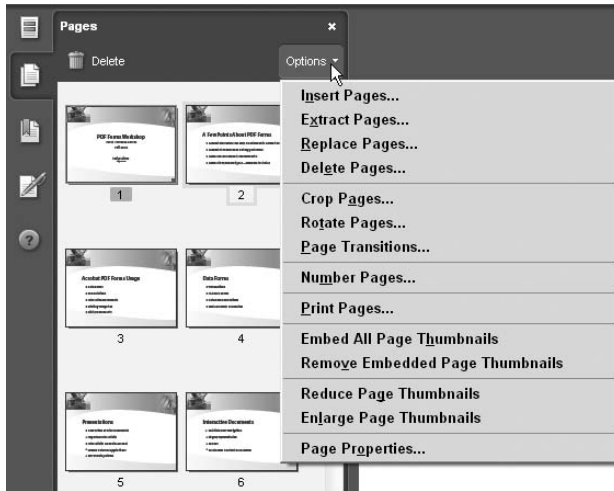
Pages



Acrobat users have been familiar with the thumbnail view of each page since the early days of Acrobat. A mini view of each page in the active PDF document is displayed in the Pages pane, as shown in Figure 1.39. The Pages pane offers you menu options for arranging, deleting, inserting, and editing pages in a number of ways. You can zoom in to the thumbnail views as large or even larger than a page viewed in the Document pane.

FIGURE 1.39

Thumbnails are found in the Pages pane in all Acrobat viewers. The thumbnail view of document pages can be sized larger and smaller using context menu commands.



CROSS-REF For a complete description of working with pages (thumbnails), see Chapter 16.

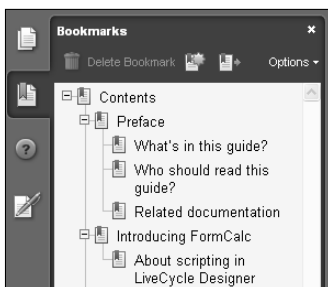
Bookmarks



The second default palette panel in the Navigation pane is the Bookmark panel. You can save PDF documents in a manner where the bookmarks are visible when the file opens in Acrobat. A good example of such a file is a Help file. When you open a file such as the Adobe Designer FormCalc file, bookmarks are visible in an open Navigation pane, as shown in Figure 1.40. You can open and close the Navigation panel by pressing F4. You can also grab the vertical separator bar at the right edge of the Navigation pane and move it left and right to size the pane.

FIGURE 1.40

Bookmarks can be displayed in the Navigation pane when a file opens.



Bookmarks are navigation buttons that can launch a page, a view, or one of many different Action types similar to link and button actions. Anyone familiar with Acrobat already knows much about bookmarks and how to navigate pages by clicking individual bookmarks in the palette.

CROSS-REF To learn how to create and manage bookmarks and add actions, see Chapter 17.

How To



The How To pane has been moved from where it appeared in Acrobat 6 and 7. In Acrobat 8, the How To pane is docked in the Navigation pane and its behavior is similar to other palettes. Here you find help information on some key Acrobat editing tasks. Click the links shown in Figure 1.41 and the help information is displayed in the pane.

CROSS-REF For more information on getting help in Acrobat, see the section “Accessing Help” later in this chapter.

Signatures

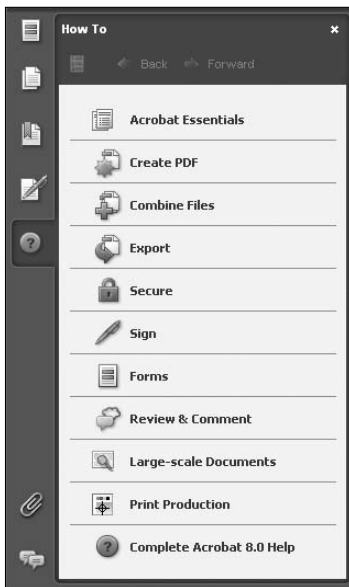


Digital signatures help you manage signed documents; the Signatures panel enables you to perform tasks such as displaying signatures in the Signature pane, verifying signatures, clearing them, deleting them, and so on. All these editing tasks with signatures are still available in Acrobat Professional as is signature validation, which is also available in other Acrobat viewers.

CROSS-REF For a complete description of creating and managing digital signatures, see Chapter 26.

FIGURE 1.41

The How To pane provides help information on key Acrobat editing topics.



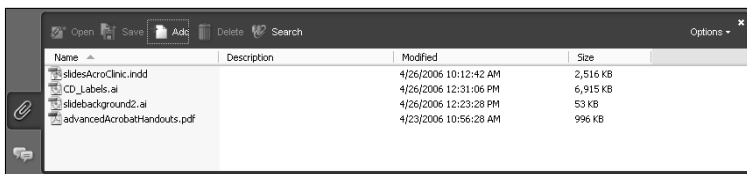
Attachments



The Attachments pane (see Figure 1.42) in all Acrobat viewers is used to display, manage, and extract file attachments. You can attach files in Acrobat Standard and Professional and extract file attachments using all Acrobat viewers including Adobe Reader.

FIGURE 1.42

The Attachments pane provides options for managing file attachments. Attachments can be extracted from within Adobe Reader.



CROSS-REF

For a complete description of adding file attachments to PDF documents, see Chapter 15. For more on extracting attachments from within Adobe Reader, see Chapter 3.

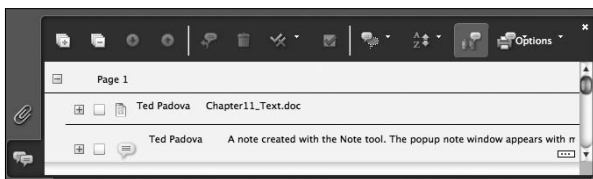
Comments



The Comments palette shows you comments in an expanded horizontal view, just like the Attachments pane. When you click the Comments panel, you'll notice a number of pull-down menus (signified by down-pointing arrows at the top of the pane), a list of comments that can be expanded and collapsed, and a host of tools within the palette, as shown in Figure 1.43.

FIGURE 1.43

The Comments palette



CROSS-REF

For a complete description of creating and managing comments, see Chapters 20 and 21.

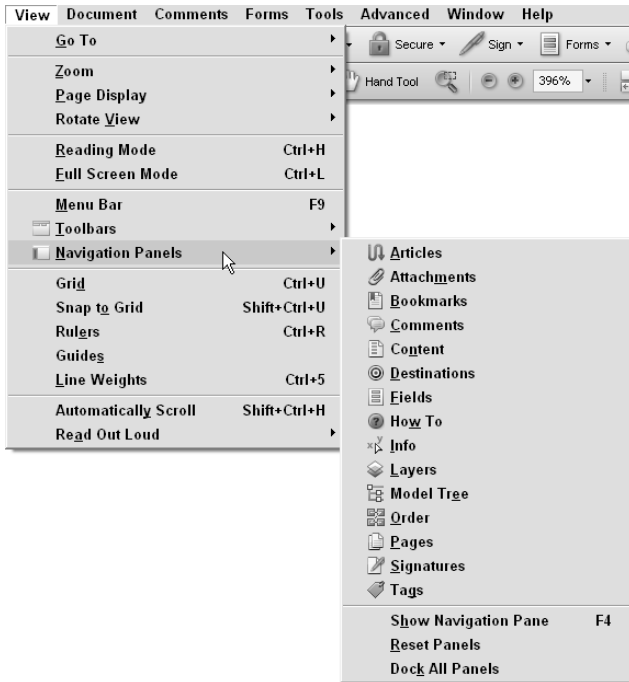
Hidden panels

As with toolbars, you can choose to view additional panels through menu commands. You can choose to display a number of other panels in the Acrobat window and dock them in the Navigation pane. To open a hidden panel, choose View ⇨ Navigation Panels. From the submenu, you'll find all the panels available. In Figure 1.44, the list shows Navigation panels available in Acrobat Professional.

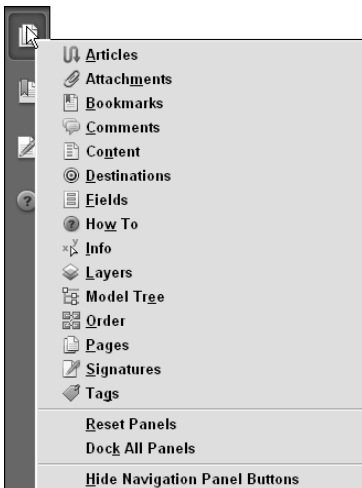
Another way to access the Navigation panels is through a context menu. Right-click (Windows) or Ctrl+click (Macintosh) on the Navigation pane and a menu shows all the Navigation Panels. In order to see the panels, you must first open them from the Navigation Panels submenu and dock them in the Navigation pane. Once the panels have been docked, they appear in a context menu, as shown in Figure 1.45.

FIGURE 1.44

Open the Navigation Panels menu and a submenu displays all Navigation panels.

**FIGURE 1.45**

Once Navigation panels have been docked in the Navigation pane, they appear in a context menu opened from the Navigation pane.



The list includes the default panels. If you select a default panel, the Navigation pane opens and the panel is selected. When you select a hidden panel, in other words, a panel other than those docked in the Navigation pane when you first launch Acrobat, the panel opens in the Acrobat window as a floating palette with one or more panels contained in the window. Drag a panel to the Navigation pane and it docks and then becomes visible in a context menu opened from the Navigation pane.

Articles



The first of the hidden panels listed in the Navigation Panels submenu is Articles. Choose View ⇨ Navigation Panels ⇨ Articles to open a floating palette. Articles enable you to create article threads to help users follow passages of text in a logical reading order. You won't find any new features added to the Article tool since Acrobat 5.

CROSS-REF

For information on creating article threads and managing them, see Chapter 16.

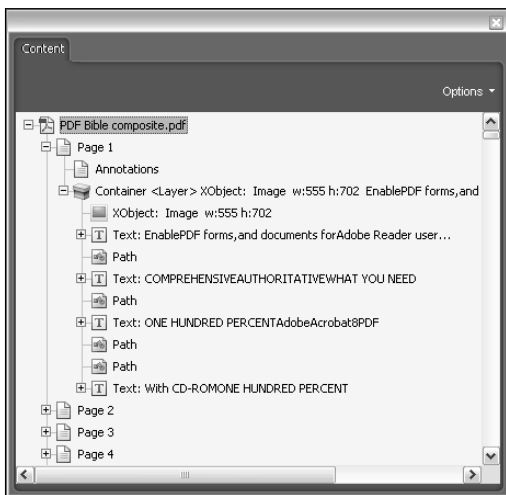
Content



A palette designed for managing the structural content of PDF documents is found in the Content panel. When you choose View ⇨ Navigation Panels ⇨ Content, the Content palette opens in a floating palette as shown in Figure 1.46. Content features help you reflow tagged PDF files and manipulate the structure of tagged documents.

FIGURE 1.46

The Content palette opens in a floating palette where the structural content of the open file is reported.



CROSS-REF

For information on working with the Content palette and tagged PDF documents, see Chapter 25.

Destinations



Destinations work similarly to bookmarks, in that specific views are captured and listed in the panel. Clicking a destination opens the associated page in the Document pane, whereas clicking a bookmark opens the associated view (page and zoom).

CROSS-REF

For information on creating destinations and managing them, see Chapter 22.

Fields



The Fields panel enables you to manage form fields on Acrobat PDF forms. You can list all form fields in the panel and execute menu commands from the pull-down menu and context menu opened from within the palette.

CROSS-REF

For information about Acrobat forms, see Part VI.

Info



The Info panel displays the x,y position of the mouse cursor as you move it around the Document pane. From this panel you can choose to display from among three different units of measure — points, inches, millimeters, centimeters, and picas. No changes have been made to the Info palette in Acrobat viewers.

CROSS-REF

For information on working with the Info panel, see Chapter 4.

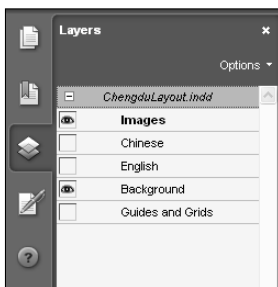
Layers



If you create documents containing Adobe PDF layers, the Layers palette permits you to toggle layer views and work with layer properties. In Figure 1.47, the Layers palette is open showing visible and hidden layers.

FIGURE 1.47

The Layers palette enables you to manage layer visibility.



CROSS-REF

To understand more about working with Adobe PDF layers, see Chapter 24.

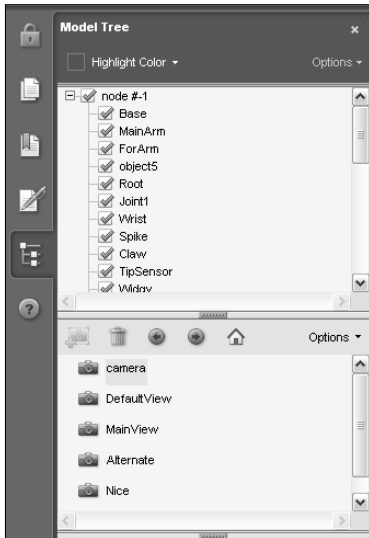
Model Tree



The Model Tree palette lets you examine information related to 3D drawings. You can review assets, hide and show drawing parts, toggle views, review comments, and more on 3D drawings. In Figure 1.48 you can see the model tree shown for a 3D image.

FIGURE 1.48

The Model Tree palette is designed to work with 3D drawings.



CROSS-REF

For more information about viewing 3D drawings and Acrobat 3D, see Chapter 2.

Order



You use the Order panel to manage reading order of documents. This panel also relates to document accessibility, like the options available in the Tags panel. The Order panel enables you to add tags to a document, clear tags, and reorder a page's contents to change a reading order that might be read aloud by a screen reader.

CROSS-REF

For information on working with the Order panel, understanding screen readers, and document accessibility, see Chapter 25.

Tags



Tagged PDF files provide more editing capability with PDF documents, and the files can be made accessible to adaptive devices such as screen readers. For adding, editing, and annotating tags in PDF documents use the Tags panel. Together with the Content panel options, you have much control over document accessibility.

CROSS-REF

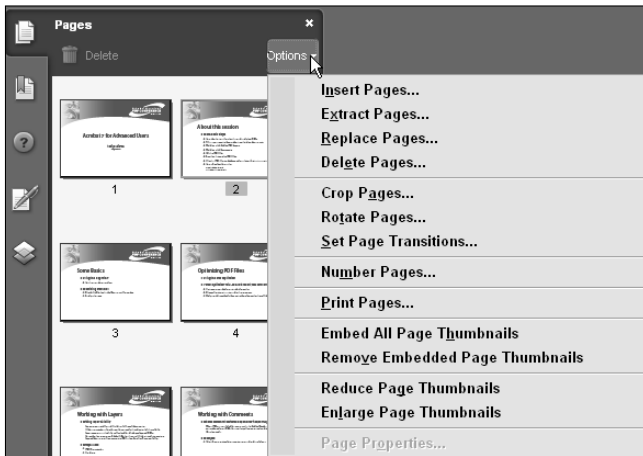
To understand accessibility and the advantages of creating tagged PDF documents, see Chapter 25.

Palette menus

Each of the panels contains its own pull-down menu. When a panel is open in the Navigation pane or in a floating window, select the Options down-pointing arrow to open a pull-down menu, as shown in Figure 1.49. Menu commands found in panels may or may not be available from the top-level menu bar. Additionally, some panels, like the Attachments and Comments panels, offer you several pull-down menus.

FIGURE 1.49

Palette Options menus provide menu commands specific to each palette function.



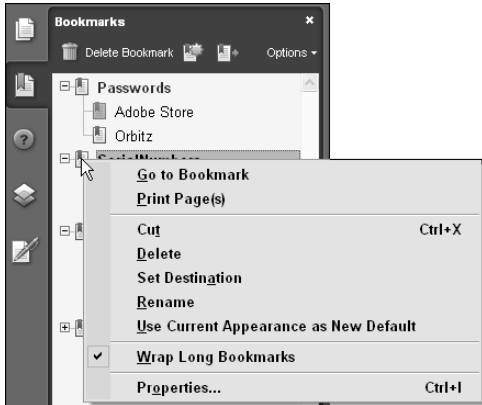
Context menus

Context menus can display different options for palette choices depending on where you open a context menu. If you move the cursor to an empty area when all text and objects in a palette are deselected and open a context menu, the menu options may be different than when you select text or an object in a palette. However, this is not always the case, because a few palettes provide you with the same options regardless of whether something is selected or not. In Figure 1.50 a context menu is opened within the Bookmarks panel. In this case you need to open the menu on a bookmark name. If you attempt to open a context menu in an empty area in the pane, no menu opens.

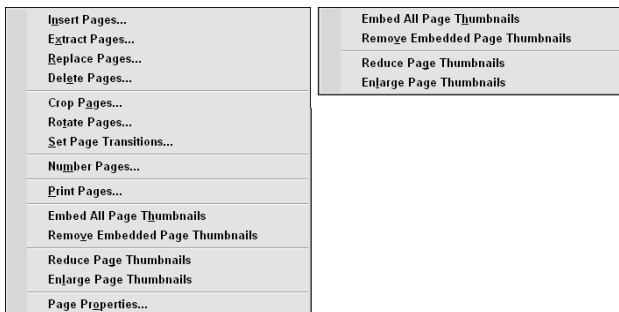
In Figure 1.51, a page in the Pages pane is selected and a context menu is opened on the page, as shown on the left side of the figure. On the right, a context menu is opened in an empty area in the pages pane. This figure illustrates the different menu options some panels have when selecting an object versus an open area in the pane.

FIGURE 1.50

A context menu opened on a bookmark.

**FIGURE 1.51**

When a page is selected in the Pages palette and a context menu is opened, more menu choices are available than when no page is selected.



Accessing Help

You can see the number of different commands and tools available in Acrobat are extraordinary — and you haven't yet looked at all the submenu options or different preference options accessed from the top-level menu bar. With all these features available to you, your initial Acrobat sessions can sometimes be overwhelming. Fortunately, the great engineers and program designers at Adobe Systems thought about you and they decided to provide some help.

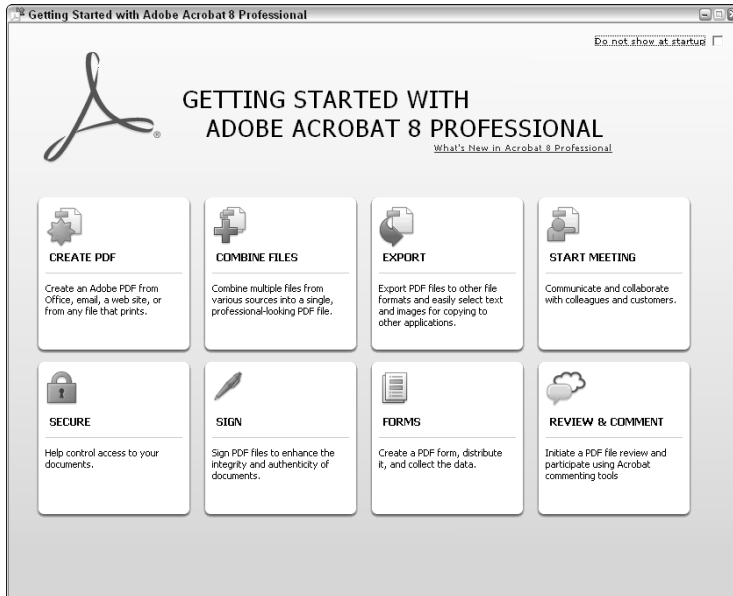
Help with learning more about Acrobat comes in several forms and you can choose from several help methods to find the one that works well in your workflow. This section covers different options for getting help in an Acrobat session.

Getting Started in Acrobat

When you first launch Acrobat, the Getting Started window opens, as shown in Figure 1.52. This window provides a number of different help items that ease you into the world of Acrobat and PDF.

FIGURE 1.52

When you first launch Acrobat 8, the Getting Started window opens.



Click any one of the eight buttons in the Getting Started window and another pane respective to your selection opens where help information is provided.

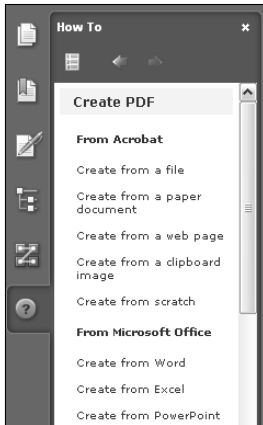
CROSS-REF For more detail on the options in the Getting Started Window, see Chapter 4.

How To pane

The How To panel appears in the Navigation pane. Click the icon with a question mark and the How To pane opens. The topics in the How To pane are similar to those in the welcome screen. Click a topic listed in the pane and a second screen opens in the pane, providing another list of topics. Click on a topic and help information is provided in the pane, as shown in Figure 1.53.

FIGURE 1.53

Click different topics in the How To pane in the Navigation pane to explore help information.



Acrobat help

The How To window contains a select group of common Acrobat features about which you can find help within the listed topics on the Homepage. However, Acrobat is a monster program with many features and listing all the methods for working in the program is not the purpose of the How To help pane. To browse through a comprehensive help guide you need to access a different document. The comprehensive help guide contains more than 800 pages covering just about everything you want to know about Acrobat. There are, in essence, two flavors of the Acrobat Help guide. You can access the Complete Acrobat 8.0 Help document by selecting Help ⇨ Complete Adobe Acrobat 8.0 Professional (or Standard) Help or you can open the Acrohelp.pdf file in Acrobat. These two documents are different in that the Complete Acrobat Help document is viewed in a separate executable application called the Adobe Help Viewer. The Acrohelp.pdf file is a standard PDF document contained in the Acrobat folder. Depending on which one you open, you have some different methods for viewing and navigation.

Complete Acrobat 8.0 Help

You open the Adobe Help Viewer window by selecting Help ⇨ Complete Adobe Acrobat 8.0 Professional (or Standard) Help. The Adobe Help Viewer contains three tabs appear in the top of the window as shown in Figure 1.54. Click the Contents tab to show bookmarks, Index to see an alphabetical list of indexed topics, and Search to search for keywords.

Contents tab

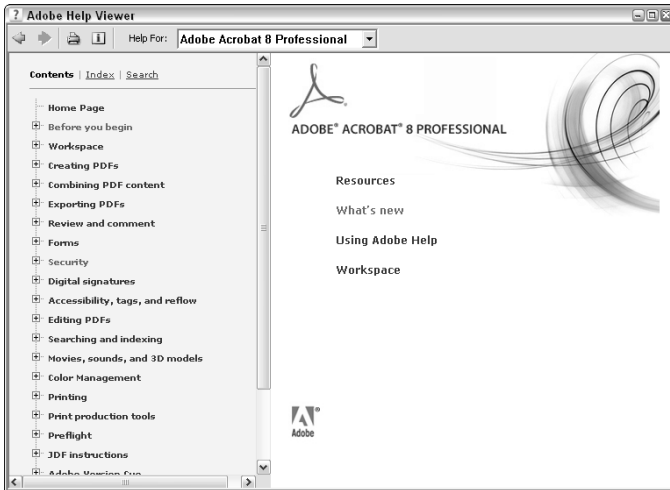
By default the Adobe Help Viewer document opens with the Contents tab exposed as shown in Figure 1.54. In the Navigation pane you'll find a table of contents for the document shown in a very similar manner to the way bookmarks are listed in a PDF document. Click one of the bookmark topics listed in the Contents tab to see the respective bookmarked page in the Topic pane.

Search tab

You can use the Search tab to find any word(s) in the help document. Click the Search tab and the Navigation pane changes to display a field box where you type your search criteria. Type one or more words in the field box and click Search. The results then appear in the Search tab. All text appearing in red is linked to the page that opens in the Topic pane.

FIGURE 1.54

The Adobe Help Viewer opens as a floating window with three tabs — Contents, for listing bookmarks; Index, for an alphabetical topic list; and Search, for keyword searches.



Index tab

The Index tab is an alpha index of topics. Click the text to open pages linked to the topics.

Navigating topics

The arrows at the top of the Navigation pane enable you to move forward and back to the pages you view during your search. The review history remains in memory until you close the document. If you close the help file, the review history is flushed from memory and you need to begin again to find information on the same topics. On the right side of the Topic pane is a scroll bar. Use the arrow keys and elevator bar to view documents as you do in any application document.

Printing topics

The Print tool located at the top of the Navigation pane opens the Print dialog box. In the Print dialog box you can choose to print a single page or a page range.

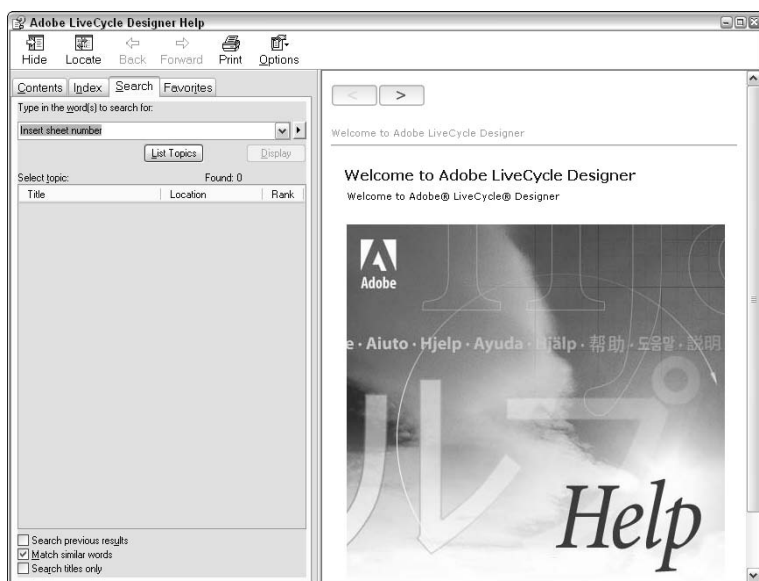
Adobe LiveCycle Designer

Adobe LiveCycle Designer is a separate executable program available to Acrobat Professional users on Windows only. Designer is used for creating dynamic XML forms. Designer also has a help document to assist you in learning the program. To access the Help file, select Help ⇨ Adobe LiveCycle Designer Help or press the F1 key. The help document shown in Figure 1.55 opens.

Under the help menu you find other help options for accessing the Designer How To window and opening a scripting notation in the Adobe LiveCycle Designer help document with a link to a Web page on Adobe's Web site where more information about Adobe LiveCycle Designer can be found. In addition to menu commands under the Help menu you have sample files contained in the Adobe LiveCycle Designer 8.0 folder. Browse the folder contents to learn more about creating forms in LiveCycle Designer.

FIGURE 1.55

Press the F1 key in Adobe Designer to open the help document.



More help

In addition to the help file that covers working in Acrobat, some other help PDF files are located in the Help folder inside your Acrobat folder. These help documents are specific to certain tasks, such as pdfmark and Distiller parameters. To view the help documents, open your Acrobat folder and open the Help\ENU folder. The files are PDF documents and can be opened in any viewer.

Online help is available to you as well from Adobe Systems. If you choose Help ⇨ Online Support and select one of the submenu items, your default Web browser launches and the Adobe Acrobat support page opens from Adobe's Web site. This Web page links to pages that are continually updated so be certain to make frequent visits to the Acrobat Online help Web pages.

NOTE

When accessing Adobe's Online Support, your Web browser opens in the foreground while Acrobat Professional remains open in the background. When you finish viewing Web pages and quit your Web browser, the Acrobat window returns to view.

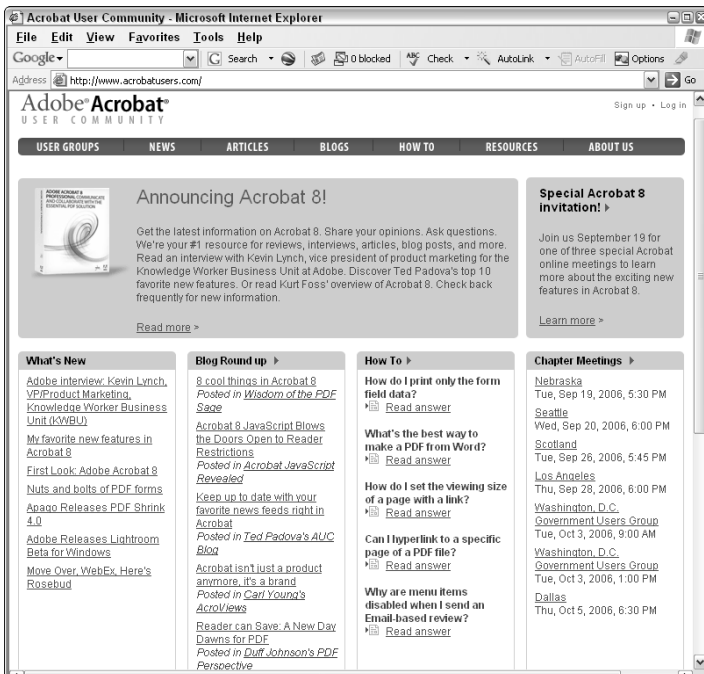
Acrobat User Community

Adobe Systems sponsors a user group forum and supports the development of user groups internationally. Some of the world's leading experts on Acrobat participate through providing tips, articles, and hosting blog sessions. You can find some of the most up-to-date information at www.acrobatusers.com. Open the Adobe Acrobat User Community Web page and the opening page appears as shown in Figure 1.56. Here you'll find an easy to use Web site filled with many tips and solutions.

If you're interested in learning more about Acrobat, you may find a user group close to your home. If not, you can become one of the many people who start a local user group. You'll find great support from Adobe if you want to start a group. To learn more about the location of user groups and how to go about starting one, search the Adobe Acrobat User Community Web site.

FIGURE 1.56

Log on to www.acrobatusers.com to find up-to-date information on Acrobat and PDF.



Understanding Preferences

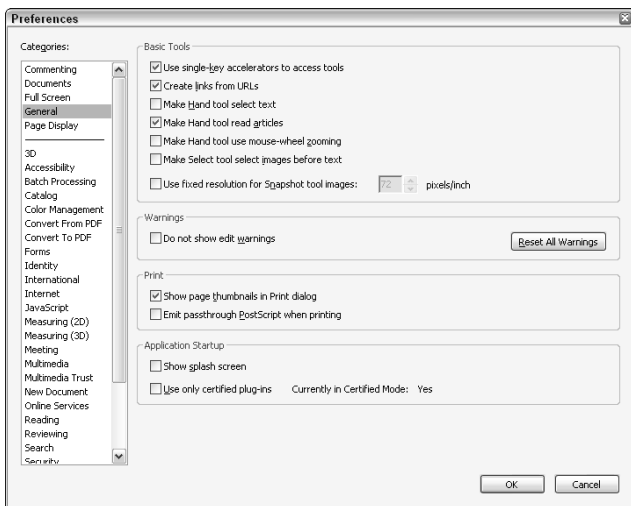
Preferences enable you to customize your work sessions in Acrobat. You can access a Preferences dialog box from within any Acrobat viewer and from within a Web browser when viewing PDFs as inline views. A huge number of preferences exist that all relate to specific tool groups or task categories, and it would not make as much sense to cover them here in the opening chapter as it would within chapters related to using tools and methods influenced by preference choices.

Some general things you should know about preferences is that they are contained in a dialog box as shown in Figure 1.57. You make a topic selection in the list on the left side of the dialog box and the related preferences are shown to the right side of the list. You make choices for preferences by selecting check boxes or making menu selections from pull-down menus. When you complete making your preference choices, click OK at the bottom of the dialog box.

Almost all the preferences you change in the Preferences dialog box are dynamic, which means you don't need to quit Acrobat and relaunch the program for a preference choice to take effect. Preferences remain in effect until you change them again. If you quit Acrobat and relaunch the program, the preferences you last made are honored by Acrobat. However, if for some reason the program crashes and you don't shut it down properly, any new preference changes will not be recognized when the program is launched again.

FIGURE 1.57

Press **Ctrl/⌘+K** to open the Preferences dialog box. Click a category on the left and the choices are reflected to the left of the categories list.



If you find some operation in Acrobat not working as you think it should, first take a look at the Preferences dialog box. In many cases you'll find a check box or menu command not enabled to permit you to perform a task. As you become familiar with specific tool groups and menu commands, make a habit of routinely visiting the Preferences dialog box so you understand all the toggles and switches that affect tool and viewing behavior.

Summary

This chapter offers you a general introduction for working in both Acrobat Standard and Acrobat Professional and helps you understand the environment, the user interface, and some of the many new features added to the commercial Acrobat products. At the very least, you should know how to go about finding help when you first start working in the program. Some of the more important points discussed in this chapter include the following:

- Adobe Acrobat is a multifaceted program designed to provide solutions for many different business professionals. Several types of Acrobat viewers exist, ranging in features to suit different user needs. The most sophisticated of the three viewers is Acrobat Professional, now in version 8. Acrobat Standard offers fewer tools and menu commands than Acrobat Professional and is now available only on Windows.
- PDF, short for Portable Document Format, was developed by Adobe Systems and was designed to exchange documents between computers and across computer platforms while maintaining file integrity.
- The PDF language format has changed version numbers along with the Acrobat viewers. The current PDF version is 1.7.
- Tasks are performed through the use of menus, tools, and palettes that can be accessed through mouse selections and keyboard shortcuts.
- The extensive list of tools appears in an abbreviated form when you open Acrobat and view the default toolbars. You can open additional toolbars from menu commands or the new More Tools window. You can dock toolbars in the Toolbar Well or float them around the Acrobat window.
- Palettes are similar to toolbars in that they can be docked and undocked from a well called the Navigation pane. Palettes contain pull-down menus, and some palettes contain tools.
- You can customize the Acrobat workplace to suit your work style through the use of different preference choices. When preferences, palettes, and toolbars are changed from their default views, the new views are saved when you quit your Acrobat session. They remain unchanged until you change them again or reset them to defaults.
- Acrobat Professional provides you extensive assistance through the use of help documents. You can gain immediate help on selected topics through choices in the How To pane or by expanding your list of categories to seek help in the Complete Acrobat 8.0 Help window. In addition to help documents, Adobe sponsors the development of local Adobe Acrobat user groups worldwide. To learn more visit www.acrobatusers.com.
- Preferences are settings that apply globally to Acrobat and influence the behavior of tools and menu commands.

Chapter 2

Using Acrobat Viewers

In Chapter 1 you got a feel for some of the tools and menu commands provided in Acrobat Standard and Acrobat Professional. If you're a PDF author and you use Acrobat Standard or Professional, knowing the capabilities of one viewer versus another is important for both job efficiency and productivity, as well as usefulness to the end user. You may want to add multimedia to a PDF document. Therefore, you need to know what authoring tool is needed to import video and sound. You may be sending out a document for review and want to solicit comments. Therefore, you need to know what viewer a user needs to send comments back to you.

At times you may find that neither Acrobat Standard nor Professional can help you do some editing tasks needed in your workflow. Fortunately, you have options for acquiring Acrobat plug-ins developed by third-party manufacturers that add much more functionality to the Acrobat tools and menu commands.

Many of the chapters ahead give you an idea of the distinctions between Acrobat Standard and Acrobat Professional and the tools accessible from one viewer versus the other. This chapter introduces you to the Acrobat viewers, points out some differences among them, and shows you how to use Acrobat plug-ins when you need more features than the viewers provide.

Viewer Distinctions

Adobe Reader, Acrobat Standard (Windows only in version 8), Acrobat Professional, Acrobat 3D, and Acrobat Elements are designed to serve different users with different purposes. It should be obvious to you that Adobe Reader, as a free download from Adobe's Web site, is much more limited in features and performance than the products you purchase. It should also be obvious that because of the low cost of Acrobat Elements, it is much more limited in features than Acrobat Standard, Acrobat Professional, and Acrobat 3D.

IN THIS CHAPTER

Understanding the differences among the Acrobat viewers

Using Acrobat plug-ins

For a general overview, take a look at the following descriptions of the Acrobat products.

Adobe Reader

Adobe Reader is available for download from Adobe's Web site free of charge. The Adobe Reader software is distributed for the purpose of viewing, printing, and searching, on PDF files created by users of Acrobat Elements, Acrobat Standard, Acrobat Professional or Acrobat 3D. Additionally, Adobe Reader is used for filling in forms on PDFs created with Acrobat Professional. The major features of Adobe Reader include:

- **Viewing and printing.** These features are common across all Acrobat viewers. You can view, navigate, and print PDF documents with Adobe Reader.
- **Forms completion and submission.** Adobe Reader enables you to complete forms but not save the form field data unless the forms carry special usage rights for Adobe Reader users. Forms are submitted through the use of buttons created on forms for e-mailing or submitting data to Web servers.

NEW FEATURE Forms and digital signatures can be saved from Adobe Reader if a PDF has been enabled with special rights. New in Acrobat is a feature to enable PDFs to save form data filled in with Adobe Reader. By default form field data cannot be saved. Only Acrobat Professional and Acrobat 3D provide this feature to enable PDFs with usage rights.

CROSS-REF For more information on enabling PDFs with usage rights, see Chapter 19.

- **Comment and Review.** PDFs can be enabled with usage rights for commenting and review in Acrobat Professional and Acrobat 3D only. Once enabled, Reader users can participate in a review workflow and save PDFs locally with comments and markups.
- **Reader Extensions Server.** If an organization uses the Adobe LiveCycle Reader Extensions Server product available from Adobe Systems to enhance PDF files, Adobe Reader users can digitally sign documents and save form data.

A distinction exists between enabling PDFs with usage rights from within Acrobat Professional/Acrobat 3D and using the Adobe Reader Extensions Server. Licensing restrictions do apply when enabling documents and you should be aware of these restrictions. See Chapter 19, for all you need to know about enabling PDFs and licensing restrictions.

In addition to the preceding, Adobe Reader provides support for eBook services and searching PDF documents, as well as extended support for working with accessible documents.

CROSS-REF For more information on using tools in Adobe Reader, see Chapter 4.

Acrobat Elements

Acrobat Elements is available for site license purchasing of 100 or more copies on Windows only. The unit costs are very aggressive and are lowered with higher volume purchases. This product is intended to offer large companies and enterprises a means for employees to create PDF files. The primary features of Acrobat Elements include:

- **Viewing and printing.** For viewing PDFs, the Adobe Reader software is used as the viewer. Elements in and of itself is not an Acrobat viewer.
- **PDF creation.** The PDF creation capability available from Elements is limited to creating PDF documents from Microsoft Office products or printing files to the Adobe PDF printer.

Acrobat Standard versus Acrobat Professional

Acrobat Standard is available only on Windows in version 8 of Acrobat. The Macintosh version has been discontinued. Adobe Systems is a company that tries hard to respond to user needs, but there are limitations. If a product does not support the development costs, then it is likely to be discontinued. This is the case with Acrobat Standard on the Macintosh. Many users of Acrobat on the Mac acquire Acrobat Professional in a bundled purchase with the Adobe Creative Suite. Independent sales of Acrobat Standard were minimal on the Mac during the Acrobat 7 life cycle. Therefore, Adobe could not justify the development costs for continuing the product. On Windows, sales of Acrobat Standard were much greater, and therefore you see Acrobat Standard still available.

Acrobat Standard is the lightweight of the authoring programs. However, Acrobat Standard still offers many tools for PDF creation and authoring. Without going into every tool that differs between Acrobat Standard and Acrobat Professional, the major differences include the following limitations:

- **Form field authoring.** No form tools or form field authoring is available with Acrobat Standard. JavaScripts on form fields cannot be created in Acrobat Standard. However, if a JavaScript is contained in an area accessible to Acrobat Standard (such as Bookmark Properties or Link Properties), the JavaScript can be edited. You can also write JavaScripts on Page Actions in Acrobat Standard.

CROSS-REF For information on writing JavaScripts, see Chapter 36.

- **Professional printing.** Acrobat Standard does not provide options for soft proofing color, pre-flighting jobs, or commercial printing using such features as color separations, frequency control, transparency flattening, and so on. All these print controls are contained only in Acrobat Professional.

CROSS-REF For information on pre-flighting, soft proofing color, and commercial printing, see Chapter 32.

- **Adding Adobe Reader usage rights.** You can add usage rights enabling Adobe Reader users to add comments, extract file attachments to PDF documents, and in Acrobat 8 add usage rights for saving form field data and digital signatures in Acrobat Professional. Acrobat Standard does not support adding usage rights to PDF files for Reader users.

CROSS-REF For information on adding usage rights for Adobe Reader users, see Chapter 19.

- **Redaction.** The new tools for redacting documents are not available to Acrobat Standard users.

CROSS-REF For information on using the Redaction tools and redacting documents, see Chapter 14.

- **Batch processing.** Acrobat Standard does not support batch processing and running batch commands.

CROSS-REF For information on creating batch sequences, see Chapter 18.

- **Creating index files.** Acrobat Catalog is not part of Acrobat Standard. You can create index files only with Acrobat Professional through a menu command that launches Acrobat Catalog.

CROSS-REF For information on creating index files, see Chapter 6.

- **Creating PDFs.** Acrobat Standard offers support for an impressive range of file types that can be converted to PDF. However, Acrobat Standard doesn't support creating PDFs from certain file types such as AutoCAD, Microsoft Visio, and Microsoft Project. Acrobat Standard does use Acrobat Distiller, but the Acrobat Standard Distiller does not support PDF/X, PDF/E, and PDF/A compliance.

CROSS-REF For information on using Acrobat Distiller, see Chapter 8. For information on PDF/A and PDF/X, see Chapters 10 and 32.

- **Engineering tools.** Acrobat Standard does not support some features used by engineers and technical illustrators, such as merging and flattening layers.

CROSS-REF For information on using the measuring tools and working with layers, see Chapter 24.

The preceding items are some of the major differences between these two commercial viewers. You will discover subtle differences as you work with the programs. For example, Acrobat Standard doesn't support comparing documents, migrating comments, Bates numbering, show and snap to grids, convert .dwg and .indd files, does not contain the PDF Optimizer for repurposing files, and so on.

If your mission is to recommend the product for purchase or make the decision for your own use, be aware of the four primary distinctions between the products: Acrobat Standard does not support forms authoring, professional printing, engineering tools, or adding Adobe Reader usage rights for review and comment and forms data saving and digital signatures. If your work is in one of these areas, you need to purchase Acrobat Professional.

Acrobat 3D

Acrobat 3D is a commercial Acrobat product with all the features of Acrobat Professional. Its main focus is on the manufacturing segment and aimed at Engineering Design and Technical Publication workflows. Acrobat 3D additionally adds support for the Acrobat 3D Toolkit, 3D Capture for UNIX, and a conversion framework for converting and placing major CAD file formats into PDF files. This is a separate Acrobat product you can purchase for use with 3D drawings created in almost all major CAD formats. Among some of the features you find with Acrobat 3D are the following:

- **File conversion.** Acrobat 3D supports 3D drawing translations from all major 3D drawing programs including AutoCAD. These drawings can be imported directly into Acrobat 3D where comments, reviews, and markups can be applied and then shared with anyone using the free Adobe Reader.
- **Capture 3D files.** Acrobat 3D includes Acrobat 3D Capture so that you can convert any 3D drawing to PDF for use in Acrobat 3D.
- **Optimize, enhance, and animate.** Features in Acrobat 3D enable you to optimize drawings for faster display. You can add multiple views and materials and textures, multiple types of lighting and create animations such as exploded views, and more.
- **File compression.** 3D drawing files can be optimized for smaller file sizes.
- **3D drawing creation.** You can create simple 3D drawings directly in Acrobat 3D.
- **Photorealistic rendering.** You can render photorealistic images and create 2D raster and vector images.

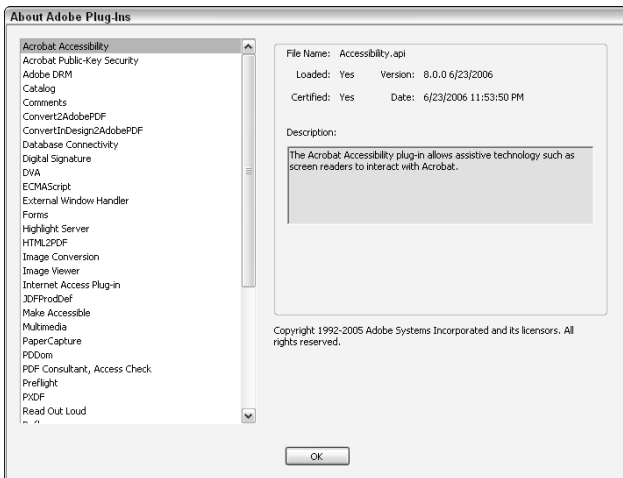
There's much more to Acrobat 3D. If you're an engineer or technical artist working with CAD applications, you might want to check out some of the benefits of working with Acrobat 3D. This book does not cover Acrobat 3D features in the chapters ahead. To learn more about Acrobat 3D, take a look at the Acrobat 3D Corner on the Adobe Acrobat User Community Web site at www.acrobatusers.com/go/3D.

Using Plug-ins

All Acrobat viewers support a plug-in architecture. Plug-ins are installed during your Acrobat installation and loaded when you launch Acrobat. Many of the features you find when exercising commands and using tools are made possible by the use of plug-ins. To view the current plug-ins loaded with the viewer you use, choose Help ⇨ About Adobe Plug-ins. The About Adobe Plug-Ins dialog box opens as shown in Figure 2.1.

FIGURE 2.1

The About Adobe Plug-Ins dialog box lists all the plug-ins accessible to your viewer.



The list in the left side of the dialog box lists the names of the installed plug-ins. Click a name to see a description for the plug-in, including whether the plug-in is certified, the version number, creation date, text description, and dependencies. To examine different plug-ins, select them in the left pane and view the description on the right side of the dialog box.

Acrobat plug-ins are developed by Adobe Systems and third-party developers. All plug-ins developed by Adobe Systems are *certified* plug-ins. No third-party plug-ins are certified. Some features in Acrobat require that only certified plug-ins be loaded before the feature is enabled. Working with eBooks is one example where only certified plug-ins can be used.

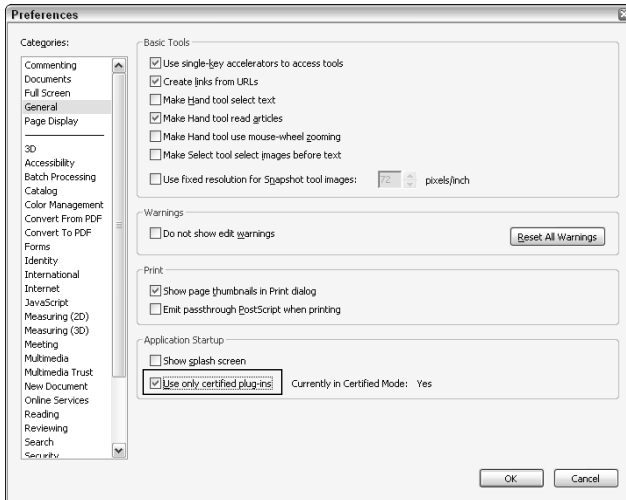
NOTE

Any time a document has Adobe DRM (Digital Rights Management) protection such as eBooks and/or documents protected with the Adobe Policy Server, the viewer is launched in *certified plug-in mode*. This mode loads only Adobe plug-ins and disables all third party plug-ins.

In order to instruct your Acrobat viewer to open with only certified plug-ins, open the Preferences dialog box by choosing Edit ⇨ Preferences. Select General in the left pane and select the Use only certified plug-ins check box, as shown in Figure 2.2. When you quit your Acrobat viewer and relaunch the program, only certified plug-ins will load.

FIGURE 2.2

Select Use only certified plug-ins to open Acrobat to allow only certified plug-ins to load.



Plug-ins developed by third-party developers can also be loaded. The list of available resources for adding to Acrobat functionality in the form of add-ons and plug-ins is almost limitless. As you review all the chapters in this book and find that something you want to accomplish in your workflow is not covered, look for a plug-in developed by a third-party developer. Chances are that you can find a product well suited to do the job.

Plug-ins for Acrobat are far too numerous to mention in this book. For a single source where you can view a list of plug-ins, download demonstration copies, and make purchases, visit the Planet PDF store at www.pdfstore.com, the Adobe Store at www.adobe.com and click on the Store link, or The PowerXChange at www.thepowerxchange.com. On several Web sites you'll find product descriptions and workflow solutions for almost any third-party product designed to work with Acrobat. When you visit one of the Web sites and review the products, be certain the product you purchase is upgraded to work with Acrobat 8.0 and the viewer you use. All products are listed with links to the manufacturer's Web sites, so you can find information on product descriptions, version numbers, and compatibility issues.

Installing plug-ins

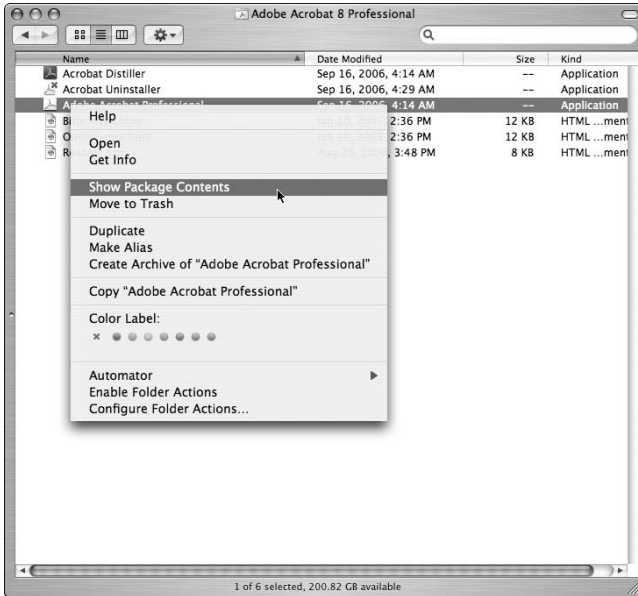
Most plug-ins you acquire from third-party manufacturers are accompanied by an installer program. Installing plug-ins is easy. Open the folder for a plug-in you download from a Web site and double-click on the installer icon. The installer routine finds the plug-ins folder inside your Acrobat folder and the plug-in is loaded when you launch Acrobat.

If a plug-in is not accompanied by an installer program, you need to manually add the plug-in to your Acrobat plug-ins folder. On Windows, open the Program Files\Adobe\Acrobat 8.0\Acrobat\plug_ins folder. Copy the plug-in you want to install to this folder.

On the Macintosh, open your Applications folder. Open the Acrobat 8 Professional (or Standard) folder from within the Applications folder. Press and hold the Control key and click the program icon (Adobe Acrobat 8 Professional or Adobe Acrobat 8 Standard) to open a context menu, as shown in Figure 2.3. From the menu items, select Show Package Contents.

FIGURE 2.3

Open the Package Contents on the Macintosh to gain access to the Plug-ins folder.



When you open the Package Contents, the Contents folder appears in a single window. Double-click the folder to open it. Several folders appear within the Contents folder, one of which is named Plug-ins. Open this folder and copy your plug-in to it.

Uninstalling plug-ins

If your plug-in is not accompanied by an uninstaller program, you need to either disable the plug-in or physically remove it from the Acrobat plug-ins folder. A temporary solution is to disable third-party plug-ins by opening the Preferences dialog box, clicking on Startup, and selecting the check box for Use only certified plug-ins, as shown earlier in Figure 2.2.

To permanently remove a plug-in, open the plug-ins folder as described in the previous section, "Installing plug-ins," and drag the plug-in out of the Acrobat plug-ins folder.

CAUTION

Some plug-ins are installed in their own folder. To remove a plug-in, drag the folder where the plug-in is installed out of the Acrobat plug-ins folder. Be certain not to remove the Acrobat plug-ins folder from within the Acrobat folder. Doing so disables all tools and menu commands using plug-ins.

Resolving plug-in conflicts

At times you may find a plug-in conflict among several third-party products or a plug-in that may have a bug. If your Acrobat functionality is impaired and you can't launch the program, hold down the Shift key while double-clicking the program icon to launch your viewer. All plug-ins are disabled when you use the modifier key. Open the Preferences dialog box again and select the Use only certified plug-ins check box. Quit and relaunch the program, and the offending plug-in is eliminated during startup.

If a plug-in is creating a problem, you may need to use a process of elimination to figure out which one it is by opening your plug-ins folder and removing all plug-ins. Then add several plug-ins at a time back to the plug-ins folder and launch your viewer. Keep adding plug-ins back to the plug-ins folder until you discover the plug-in that produces the error.

Working with plug-ins

There are many different plug-ins that provide you more features when working with Adobe Acrobat and Adobe Reader than can be covered in this book. To pick one out among the many is a hard choice. For your own workflow, visit the Planet PDF Store, Adobe Store, the PowerXChange, or the Acrobat User Community and explore various plug-ins available for download. Try to find a plug-in that offers at least a demo trial period and download it.

Almost all plug-ins come with a ReadMe file or user manual. Before installing a plug-in, be certain to review the installation recommendations by the developer. Install the plug-in and give it a try.

For a trial in using a plug-in, see Chapter 36 where using a third-party plug-in is discussed in more detail. Windows users can follow steps to install and use a plug-in by installing the AcroButtons and AcroDialogs plug-ins from the book's CD-ROM.

ON the CD-ROM

See the book's CD-ROM for plug-in installers for AcroButtons and AcroDialogs developed by WindJack Solutions. These installers are for use on Windows only.

Summary

- The four Acrobat viewers include Adobe Reader, Acrobat Standard, Acrobat Professional, and Acrobat 3D. The tools that can create Adobe PDFs include Acrobat Elements, Acrobat Standard, Acrobat Professional, and Acrobat 3D.
- Adobe Reader is a free download from Adobe's Web site. All other products require purchase. Acrobat Elements is available only in site license quantities of 100 or more.
- Acrobat Standard offers fewer features than Acrobat Professional and is available in version 8 on Windows only. The primary limitations with Acrobat Standard are no support for Forms creation, commercial printing tools, engineering tools, or creating PDFs with Adobe Reader usage rights. These features are only available in Acrobat Professional or Acrobat 3D.
- Acrobat plug-ins are additions to Acrobat that offer features and tools for adding more functionality to Acrobat viewers. Plug-ins are installed with Acrobat from sources developed by Adobe Systems.
- Plug-ins are available from third-party software manufacturers. A complete list of plug-ins and demonstration products is available at the Planet PDF Store, the Adobe Store, and The PowerXChange.

Chapter 3

Getting Started in Adobe Acrobat

In Chapter 1, I talked about getting help in Adobe Acrobat using many different help menu commands and I discussed a little bit about using the new Getting Started with Adobe Acrobat welcome window. There's much more to this welcome window, as well as different ways to access it, than I covered in Chapter 1. Therefore, a separate chapter detailing the specifics of the welcome and help options seems appropriate.

In this chapter, I talk about some of the links and options you have using the Getting Started with Adobe Acrobat welcome window when you start up Acrobat and when you begin to work on some different editing tasks.

Getting Started Window

The window you see when you launch Acrobat viewers is the *Getting Started window*. Depending on the viewer you launch you'll see *Getting Started with Adobe Acrobat 8 Professional* (or *Getting Started with Adobe Acrobat 8 Standard—Windows*, or *Beyond Adobe Reader*). When you first launch Acrobat 8 Professional you see the Getting Started window, as shown in Figure 3.1.

The same welcome window with some different options appears in all Acrobat viewers in Acrobat version 8. Figure 3.1 shows the screen opened in Acrobat Professional.

IN THIS CHAPTER

Showing and hiding the Getting Started window

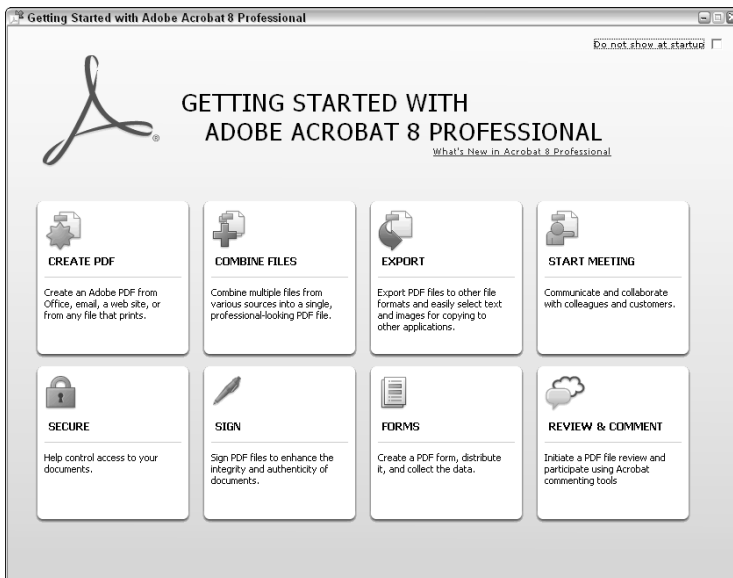
Opening and searching files

Using the features buttons

Features descriptions

FIGURE 3.1

The Getting Started with Adobe Acrobat 8 Professional window opens when you first launch Acrobat 8 Professional.





Navigating the Getting Started Window

When you first start using Acrobat 8, you'll want to take a look at the options available to you in the Getting Started window to access some help information. At some point, though, you'll want to bypass the screen when engaging in an Acrobat editing session. To stop the screen from opening on startup, check the box in the upper right corner where you see *Do not show at startup*. The next time you launch Acrobat, the Getting Started window won't open.

If at any time you want to reopen the window, select **Help** ⇨ **Getting Started with Adobe Acrobat**. The Getting Started window always opens on top of the Acrobat Document pane.

The Getting Started window contains eight task buttons that are links to other panes in the Getting Started window. When you click one of the buttons the second pane opens and displays information about the respective feature available in Acrobat.

On the second pane for any one of the eight individual task topics you find different icons and buttons that include:

- 
+
■ **Task action.** Click this button or the text adjacent to the button and Acrobat launches a dialog box or menu command to perform an action.
- 
■ **Task description.** Adjacent to this icon you find a short description explaining certain features available with the respective task.



■ **Task help.** Click the icon or the text description adjacent to the icon and the Adobe Help Viewer opens displaying help information related to the respective task.



■ **Home.** Click the Home button and you return to the first pane in the welcome window.

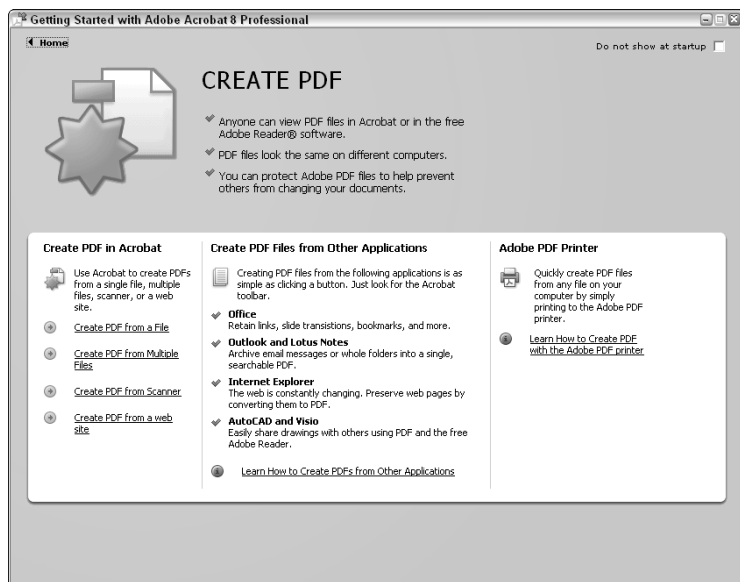
Using the Tasks Buttons

The eight tasks panes describe various options you have with the related topic and include buttons you can click to find help on the related task and buttons to get you started working with a given feature. These eight features include:

- **Create PDF.** The Create PDF task provides you with help information as well as links directly to dialog boxes used for PDF creation. A description is provided in the central pane, as shown in Figure 3.2.

FIGURE 3.2

The Create PDF task pane provides help information and links to dialog boxes.



Clicking Learn How to Create PDFs from Other Applications opens the Adobe Help Viewer where creating PDFs using the Adobe PDFMaker is explained. Clicking Learn How to Create PDF with the Adobe PDF Printer links you to the Adobe Help Viewer where creating PDFs by printing to files is explained. Clicking one of the task action buttons opens menu commands found in the Create PDF task button pull-down menu.

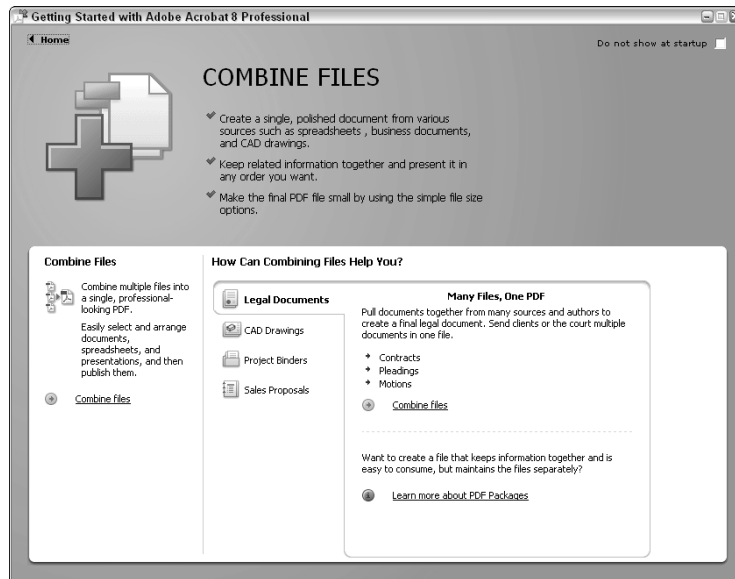
CROSS-REF

For more information on creating PDFs from other applications, see Chapters 8 and 9. For information on creating PDFs with the Adobe PDF Printer, see Chapters 7 and 10.

- Combine Files.** The new Combine Files feature is a great new addition to Acrobat 8. In the center of the Combine Files task pane shown in Figure 3.3 you see a list of descriptions for how combining files can be helpful for people working with legal documents, CAD drawings, Project Binders, and Sales Proposals. This is only an abbreviated list of descriptions for why you may want to use the Combine Files feature.

FIGURE 3.3

The Combine Files pane provides help information and links to dialog boxes related to combining files and creating PDF Packages.



The Combine Files task links open the Combine multiple files into one PDF file dialog box. At the bottom of the task pane, you see a link to help information on creating PDF Packages.

CROSS-REF

For more information on combining files and creating PDF Packages, see Chapter 12.

- **Export.** The Export tasks pane describes some file formats that you can export from Acrobat and several links to help information related to file exporting. As you can see in Figure 3.4, all the links in this task pane relate to providing help information. (When you see the text link begin with *Learn how to . . .*, the link is made to the Adobe Help Viewer document.)

CROSS-REF

For more information related to exporting PDF documents to other formats, see Chapter 11.

- **Start Meeting.** Start Meeting tasks shown in Figure 3.5 are related to Acrobat Connect sessions. You find help information related to Acrobat Connect and a link to the Welcome to Start Meeting dialog box where you can sign up for a free Acrobat Connect trial account.

CROSS-REF

For more information on Acrobat Connect and setting up a trial account, see Chapter 29.

FIGURE 3.4

The Export task pane provides help information related to exporting PDFs to other file formats.

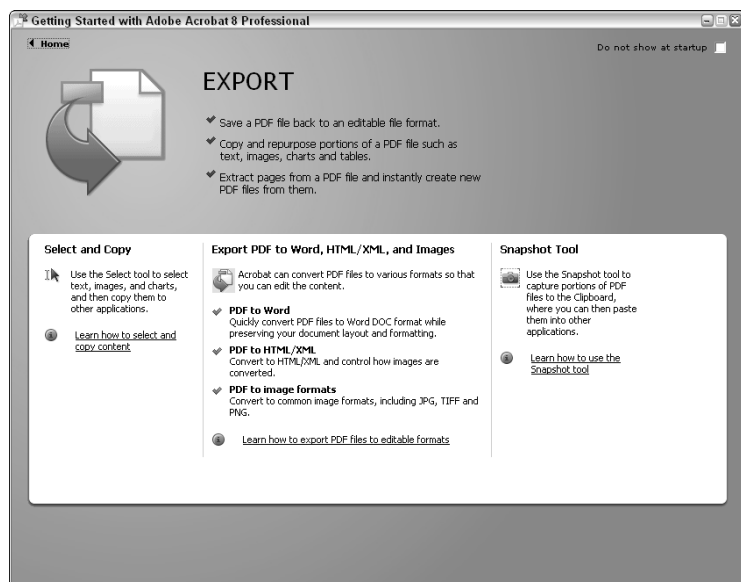
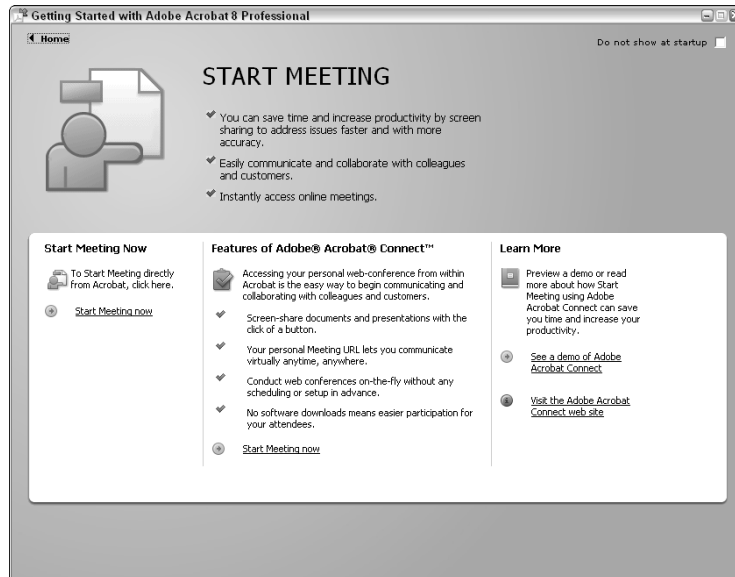


FIGURE 3.5

Start Meeting displays information related to Acrobat Connect.



- **Secure.** The Secure task pane contains information on securing PDF files. (See Figure 3.6.) Information is provided in the center of the pane for the many options Adobe offers you with PDF security and some links to help information that describes how to secure PDF files. Also, a link is made to the Create security envelope dialog box.

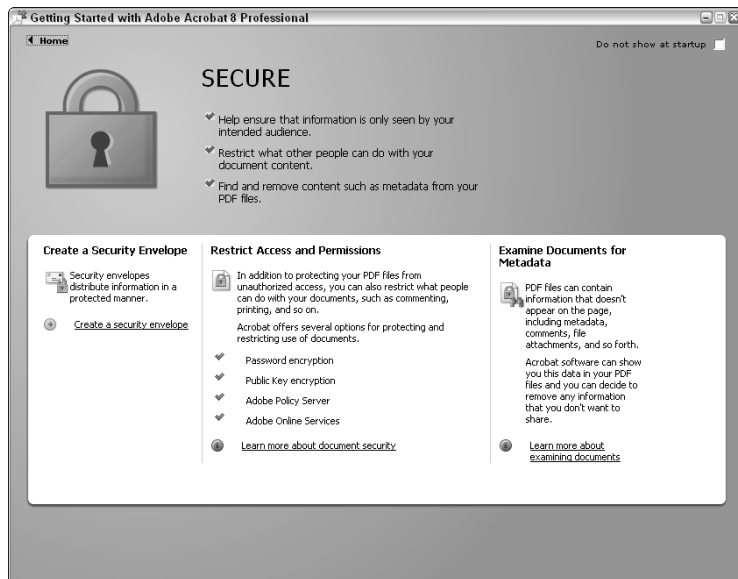
CROSS-REF

For more information related to securing PDF files, see Chapter 26.

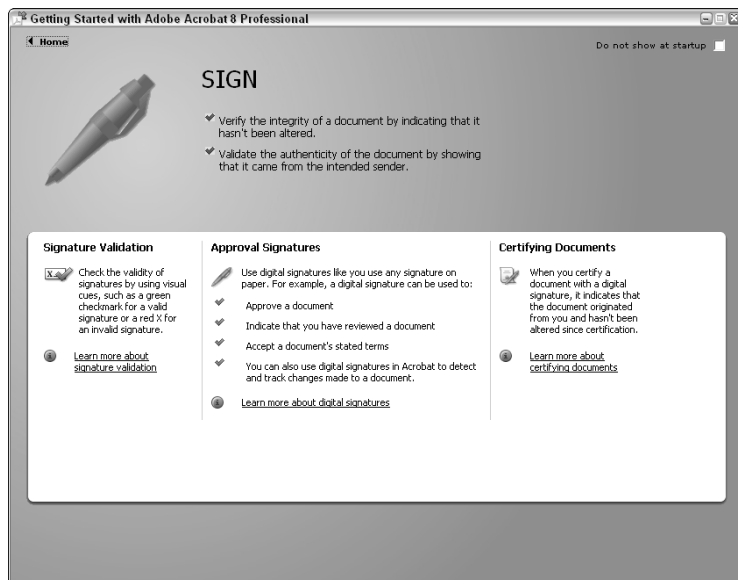
- **Sign.** The Sign tasks pane shown in Figure 3.7 provides you with information links to help files related to digital IDs and digitally signing documents.

FIGURE 3.6

The Secure task pane provides information for adding security to PDF documents.

**FIGURE 3.7**

The Sign pane provides information related to digital signatures.



CROSS-REF For more information related to digital IDs and digitally signing PDFs, see Chapter 26.

- **Forms.** A number of different links appear in the Forms task pane to pages in the Adobe Help Viewer and to dialog boxes for creating and editing forms. In Figure 3.8, you can see options for Browsing a template library (Windows), Convert an existing document, Scan a paper form, Create a new form, track forms, Distribute forms, and Compile data. All these links open dialog boxes or launch another program. On Windows, links to Create a new form and Browse the Template library launch Adobe LiveCycle Designer. On the Mac, you won't find the Browse the template library link, because Designer isn't supported. Other links are made to help files that provide more information on creating and editing forms.

CROSS-REF For information on working in Adobe Designer, see Chapter 33. For more information related to creating and editing PDF forms, see Chapter 34. For more information on collecting and compiling data, see Chapter 35.

- **Review and Comment.** The last of the tasks panes is the Review and Comment pane shown in Figure 3.9. Here you find links to help information related to commenting and review sessions. The Start a shared review features action button opens a wizard that walks you through steps to create a review session. The task actions buttons at the bottom of the E-mail and Shared columns open wizards that walk you through steps for starting an e-mail-based review or a shared review.

CROSS-REF For more information related to commenting and markups, see Chapter 20. For more information on shared reviews, see Chapter 21.

FIGURE 3.8

The Forms task pane provides information for help with creating and editing PDF forms and links that open dialog boxes and Adobe Designer (Windows only).

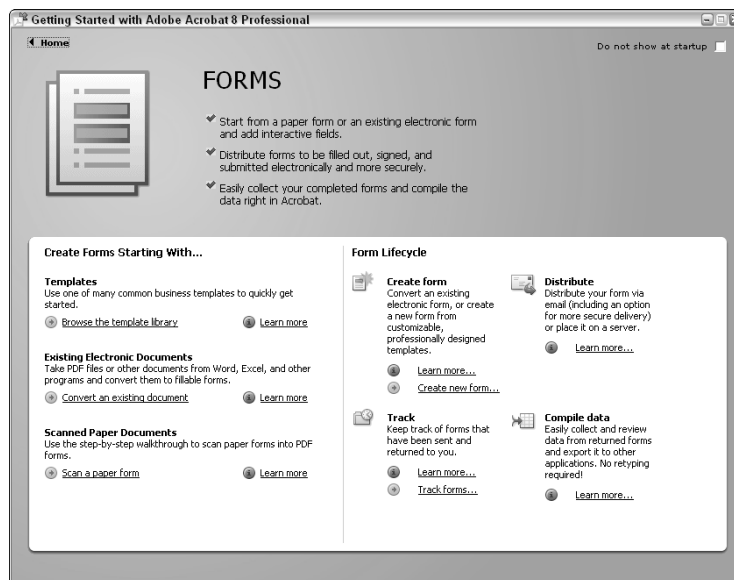
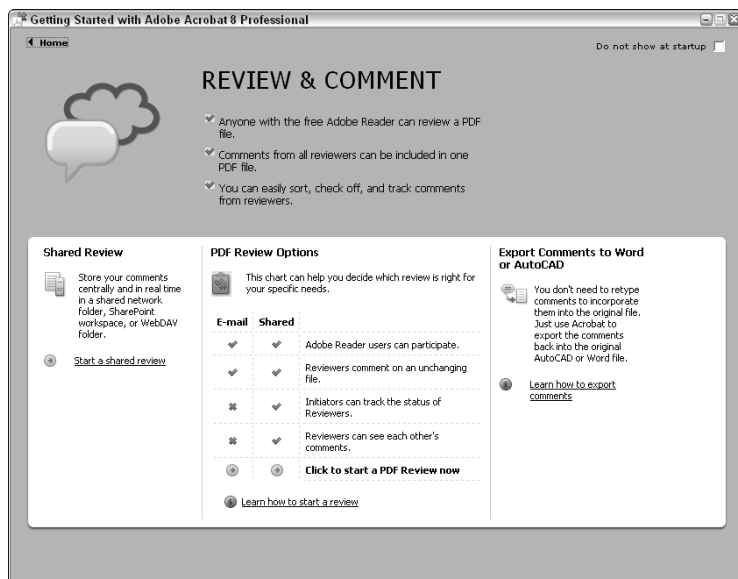


FIGURE 3.9

The Review & Comment task pane provides information for help with commenting and review sessions and links to a dialog box and a wizard to start and track reviews.

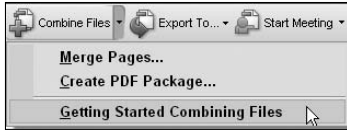


Opening the Tasks Descriptions from Tasks Buttons

If you look at the Tasks toolbar at the top of the Acrobat window you'll see the same tasks you find in the Getting Started window — that is, all but the last task button used for Send for Review. The first eight task buttons in the Tasks toolbar each have a menu command at the bottom of the task button drop-down menu that opens the Getting Started with Adobe Acrobat 8 Professional window and opens the pane respective to the task from which you select the menu command. In Figure 3.10, the menu command appears at the bottom of the Combine Files task button. As you can see, the menu command appears as Getting Started Combining Files. When you select this command, the Getting Started with Adobe Acrobat 8 Professional window opens and the Combine Files task pane is placed in view. Respectively, all the other task buttons menu commands, with the exception of the Send for Review task button, launch the Getting Started with Adobe Acrobat 8 window and open panes according to the task button menu item you select.

FIGURE 3.10

Task buttons contain menu items that open the Getting Started with Adobe Acrobat 8 window.



Summary

- The Getting Started with Adobe Acrobat welcome window appears in all Acrobat 8 viewers.
- The welcome window provides help information related to many different Acrobat features.
- The welcome window contains links to dialog boxes that support working within a particular feature.
- The Forms feature pane has a few links that open Adobe Designer on Windows.
- All the task buttons in the Tasks toolbar with the exception of the Send for Review task button contain menu commands to open the welcome window and the feature related to the task button menu item.

Chapter 4

Getting Familiar with Adobe Reader

As a PDF author you need to be aware of the capabilities and the limitations of the Adobe Reader software. In some situations you can distribute PDF documents to users of the free Adobe Reader software for active participation in your workflow without all your clients and colleagues needing to purchase the full version of Acrobat Standard or Acrobat Professional. In other situations where the Adobe Reader software does not contain tools or commands to properly edit a file for a given workflow, you may need to recommend to others which commercial viewer they need to purchase. Regardless of where you are with PDF creation and editing, at one time or another you'll be called upon to explain some of the differences between the viewers.

Adobe Reader has matured as a product and the newest release offers users much more functionality than any previous version. Features that have long been requested by users such as being able to save form data and add digital signatures are now available in Adobe Reader 8. However, the features are document-specific and require at least one person in a workflow attempting to use these new tools to author a file in Acrobat 8 Professional.

This chapter covers most of what you need to know about Adobe Reader as both a user and as a PDF author preparing documents for Reader users.

IN THIS CHAPTER

The Adobe Reader welcome screen

Setting some important preferences

Understanding Adobe Reader tools

Working with enabled PDF files

Getting Help in Adobe Reader

Getting more Adobe Reader solutions from Adobe Systems

Features lost in Adobe Reader 8

Welcome to Adobe Reader

The first change you notice when launching Adobe Reader 8 is the welcome screen. The Beyond Adobe Reader welcome screen shown in Figure 4.1 opens when you first launch the program. Each time you launch Reader the same screen opens unless you check the box “Do not show at start up.” If you dismiss the screen by checking the box for all subsequent launches of Reader, you can bring the screen back any time by selecting Help ⇨ Beyond Adobe Reader. Alternately, you can also bring the Beyond Adobe Reader screen back by opening