

Adobe Acrobat: Introduction

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Abstract

This document introduces the major features of Adobe Acrobat, explains how to create PDF files using Acrobat, and lists additional sources of information on creating and modifying PDF files.

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Introduction

Adobe Acrobat is used to create Portable Document Format (PDF) files, which can be displayed and printed using the free Acrobat Reader. You can make a PDF file from any file that can be printed – spreadsheets, reports, drawings, and documents of all types. Since PDF files can be distributed and viewed over the Web, they're also a great way to publish print documents online quickly and easily.

In addition, Acrobat also enables you to add hyperlinks, bookmarks, notes, form fields, and even audio and video to the PDF files you've created. These features can make your PDF files more useful and easier to navigate when viewed onscreen.

Note: The instructions in this document are specific to the Windows version of Acrobat; please consult the *Adobe Acrobat Guide* (the online manual) for commands specific to Macintosh.

Objectives

Adobe Acrobat: Introduction will give you the information you need to decide how to use Acrobat and PDF files in your overall strategy for delivering information. This document discusses the benefits of publishing and distributing documents as PDF files, the limitations, and the special features that differentiate PDF files from either Web or print documents. It also provides some preliminary instructions for creating and modifying PDF files.

Other Acrobat Training Available from ACS

All ACS workshops are free to KU students, staff, faculty, and [approved affiliates](#). The general public is also welcome to most workshops, but some ACS workshops require a [registration fee](#) for them.

To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit the ACS Web site at www.ku.edu/acs/train. You can also check our online schedule at www.ku.edu/acs/schedule for a list of class offerings and their availability. For further workshop related questions, please email training@ku.edu.

Definitions

Term	Definition
Acrobat (or Acrobat Exchange)	Acrobat is an Adobe application used to create and modify PDF files. (Unlike Acrobat Reader, Acrobat is not a free program.)

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Acrobat Distiller	Distiller is the part of the Acrobat application that converts Postscript (.ps) files to Portable Document Format (.pdf) files. Distiller serves the same purpose as PDFWriter (see below), but offers the user more control over the conversion process.
Acrobat PDFMaker (or PDFWriter)	Like Distiller, PDFWriter converts Postscript (.ps) files to Portable Document Format (.pdf) files.
Acrobat Reader	Acrobat Reader is a free application that allows you to view and print PDF files. Acrobat Reader is available for most platforms and operating systems. Note: Acrobat Reader is a different application than Acrobat; it will not allow you to create or modify PDF files. To create or modify PDF files, you will need to use Acrobat.
Electronic Distribution	Any type of electronic delivery of a file, such as publishing it on the Web, copying it in an Exchange public folder, or sending it as an email attachment.
PDF	Portable Document Format; this is the type of file created by Acrobat and viewable/printable by the Acrobat Reader. PDF is a proprietary file type created by Adobe.
PostScript or PS	PostScript is a programming language developed by Adobe, which is used to describe the way a page will appear when printed. In essence, it is "instructions to the printer," containing information such as which characters appear in what order, what fonts are used, and so on.
PostScript Printer Driver	A PostScript printer driver is a driver that converts the file you are printing into PostScript instructions. You must have a PostScript printer driver installed on your computer in order to install and use Acrobat.
Source File	The original file from which the PDF file is created.

What is a PDF File?

A PDF file is a "snapshot" of the source document that retains its appearance and document metadata (author, title, keywords, etc.), but eliminates most of the rest of the data found in the source file.

When you create a PDF file, you are actually first creating a PostScript file, which contains all the information a printer would need to correctly print out your document, and then "distilling" it with Acrobat Distiller, which transforms the PostScript (.ps) file into a PDF file.

When are PDF Files Useful?

PDF files can be especially helpful when you need to...

- Reduce the overall file size of a document to distribute it electronically;
- Convert large amounts of print documents to an online format quickly;
- Create online versions of documents that are still print-friendly and/or maintain their original format;
- Share documents with others who don't have the application needed to view a file;
- Convert print forms to an electronic format (forms that can be completed online, but need to be printed out and signed);
- Create files to send to a professional print shop.

How do you make a PDF File?

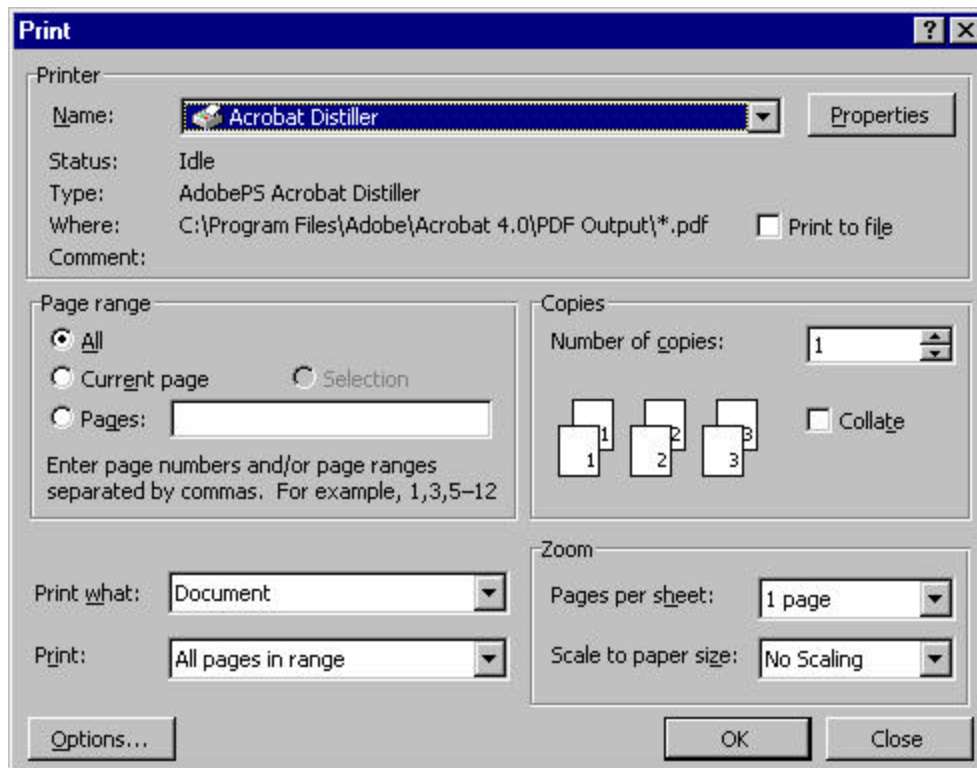
There are basically two ways to create a PDF file: from a source file (such as a Word document, an Excel spreadsheet, or another type of file that can be printed), or from a scanned document.

From a Source File

To create a PDF file, you'll need to perform these steps:

1. Install Adobe Acrobat (if it has not already been installed). If have not already installed a PostScript printer driver, you will be prompted to install one during the Acrobat installation.
2. Open the source file (using its application, such as Word, Excel, etc.).
3. Go to the **Print** or **Print Setup** dialogue box and change the printer to Acrobat Distiller.

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Select Acrobat Distiller as the printer.

4. Print the file.
5. **Optional:** Open the newly created PDF file in Acrobat (you can configure Acrobat to launch automatically and display PDF files whenever they're created), and make any desired modifications to the PDF file. If you modify a PDF file, you'll need to save your changes in Acrobat.

Alternate Methods of Creating PDF Files: PDFMaker

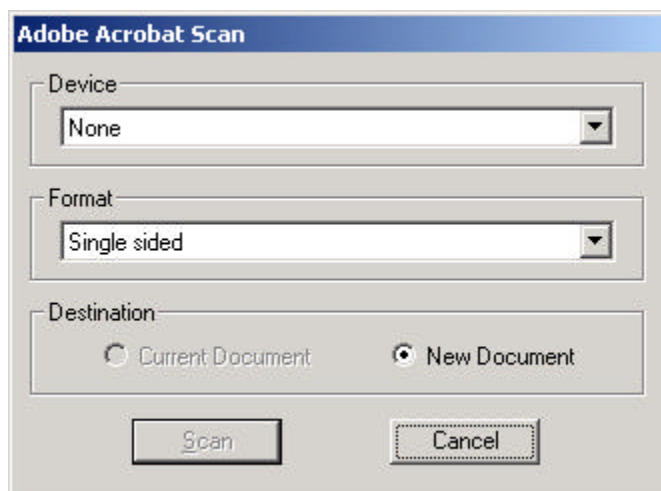
Depending on what kind of source file you're working with, you may be able to use an alternate method of creating a PDF. For instance, if you're making a PDF from a Microsoft Word or Excel document, you may be able to use the PDFMaker macro to create a PDF file, rather than choosing Acrobat Distiller as the printer and "printing" to PDF.

To use the PDFMaker macro, open the source document in Word or Excel and click the Acrobat icon () on the toolbar.

From a Scanned Document

To create a PDF file directly from a scanned document, you will need both Acrobat and a scanner with TWAIN software installed on the computer you're using.

1. Install Adobe Acrobat (if it has not already been installed). If have not already installed a PostScript printer driver, you will be prompted to install one during the Acrobat installation.
2. Start Acrobat.
3. On the Acrobat menu bar, click **File**, select **Import**, then click **Scan...** You will see an **Adobe Acrobat Scan** dialog box:



The Adobe Acrobat Scan dialog box.

4. Under **Device**, select the scanner you wish to use.
5. Under **Format**, select **Single sided** for documents that will be scanned in one page at a time; select **Double sided** for documents that will be scanned two pages (a spread) at a time.

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6. Under **Destination**, select **Current Document** if you want to add the pages you're scanning to the PDF file that's already open, or select **New Document** to create a new PDF file for them.
7. If you have not already done so, place the first page onto the scanner bed, and click **Scan**. This will launch the normal scanning application; use it as you normally would to scan the page.
8. If you have another page to scan, place it on the scanner bed, and at the Adobe dialog box, click **Next**.
9. When you are done scanning pages, click **Done**. The scanned pages will appear in the Acrobat window.

What Modifications Can You Make to a PDF File?

For documents that are short, won't be viewed much onscreen, or are being sent to a press to be printed and won't be viewed onscreen at all, it may not be necessary to modify the PDF file at all.

For documents that are longer, will be viewed onscreen, or have special requirements (forms, documents with hyperlinks, multimedia), it will be necessary to make some changes to the PDF file using Acrobat.

Note: This document does not cover all the features in Acrobat; for more details about any of the features described here, or for information about making annotations, using digital signatures, or using the Acrobat Catalog, consult the *Adobe Acrobat Guide* (the online manual included with Acrobat), or *Adobe Acrobat Classroom in a Book*.

Add navigation

One of the most useful modifications you can make is to add navigation to the PDF file. Navigation is any means of "jumping" from one place in the document to another, or to another document altogether.

The most common navigation tools used in PDF files are **bookmarks**, **thumbnails**, and **links**. For certain types of publications, **articles** and **destinations** can be useful types of navigation, too; you can get more information on using articles and destinations from the Acrobat Guide (the online user manual).

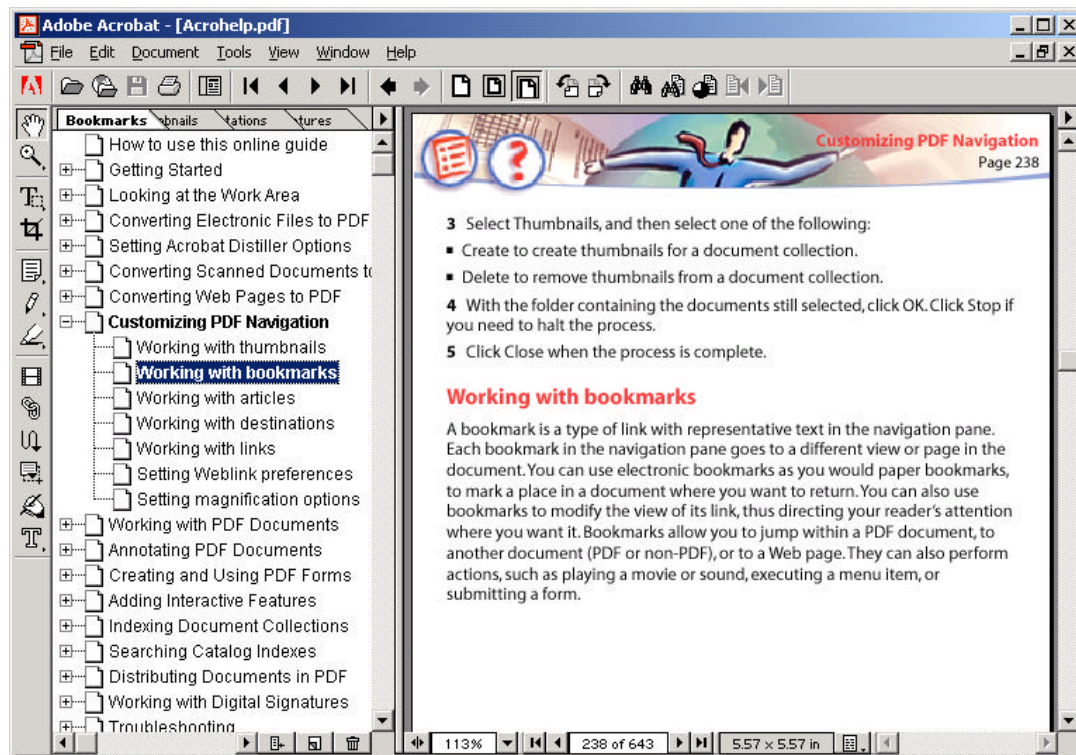
Bookmarks

Bookmarks are perhaps the most common form of navigation used in PDF files. They can be created automatically when the PDF file is generated, by using a plug-in (such as the Acrobat macro for Microsoft Word); they can also be created manually after the PDF file has been generated.

Bookmarks are lines of text that appear in the left panel of the Acrobat display; clicking one navigates you to the corresponding page.

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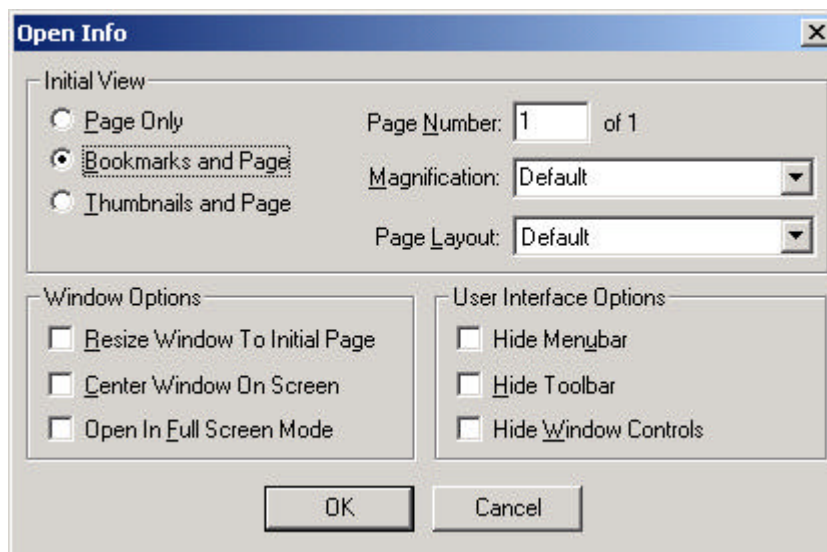
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A PDF file with bookmarks.

Before adding bookmarks to a PDF file, it's a good idea to configure the file to display the bookmarks by default. To do this, follow these instructions...

1. From the menu bar, click **File**, select **Document Info**, and click **Open...**. You will see the **Open Info** dialog box:



The Open Info dialog box.

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2. In **Initial View**, click **Bookmarks and Page**, and then click **OK**. This causes the PDF file to display bookmarks by default; that way, the users will see the bookmarks as soon as they open the file.

To add a bookmark...

1. Navigate to the “destination view” for the bookmark. The destination view is the page or part of a page that will be displayed when a reader clicks the bookmark.
2. In the Bookmark panel, right-click and select **New Bookmark** from the list of options. A new, untitled bookmark will appear in the panel. (You can also use the keyboard shortcut, **<Ctrl>B**, to create the bookmark.)
3. Type in the text for the bookmark, and press **<Enter>**.
4. You can check the bookmark by scrolling to another part of the document, then clicking the bookmark to make sure it has the correct destination.
5. Save your changes.

Note: You can also reorder and indent bookmarks by clicking and dragging them.

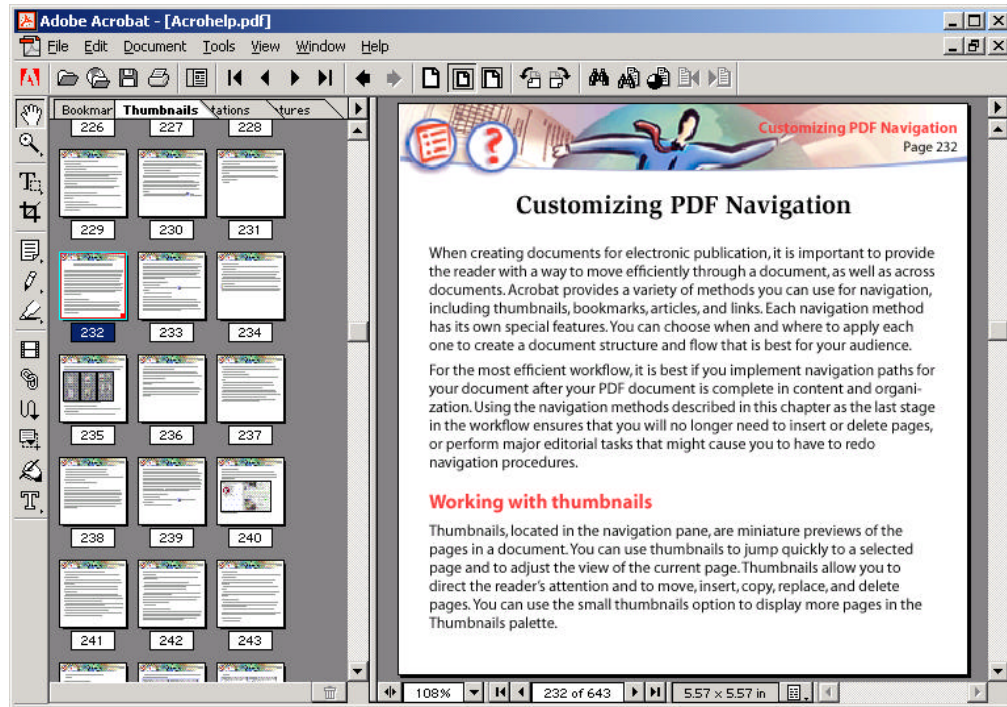
Thumbnails

Thumbnails, like bookmarks, are navigational tools that can be created automatically when the PDF file is generated, by using a plug-in (such as the Acrobat macro for Microsoft Word); they can also be created manually after the PDF file has been generated.

Thumbnails are icon versions of pages in the PDF file; double-clicking on a thumbnail navigates you to the corresponding page.

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A PDF file with thumbnails.

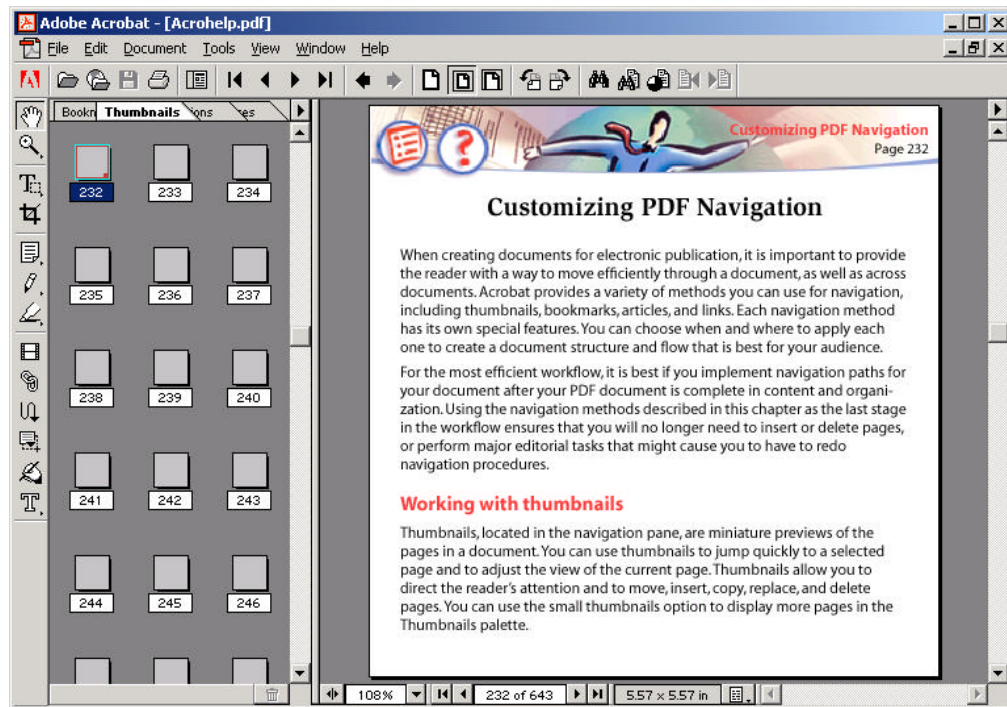
Thumbnails are most useful in layout- and graphics-heavy documents (such as online versions of magazines or brochures). For text-heavy documents with few graphics, the thumbnails will all look too similar to be very helpful.

To create thumbnails for a PDF file...

1. Click the **Thumbnails** tab at the top of the left panel. You will see a panel with blank thumbnails, like this:

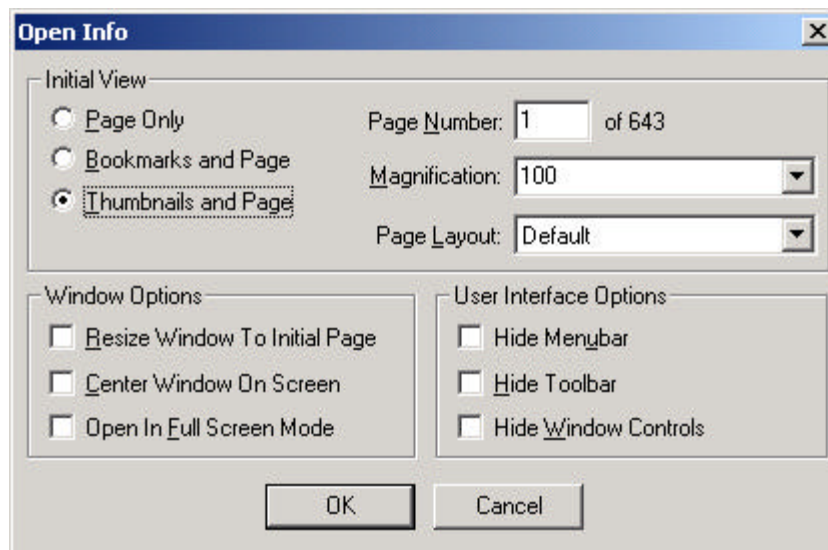
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A PDF file with blank thumbnail images.

2. Right-click on the Thumbnails panel, and select **Create All Thumbnails**. Acrobat will generate all the images for the thumbnails; this may take several seconds for large documents.
3. If you'd like the thumbnail images to be displayed the next time the file is opened, click **File**, then select **Document Info/Open...** to launch the Open Info dialog box.



The Open Info dialog box.

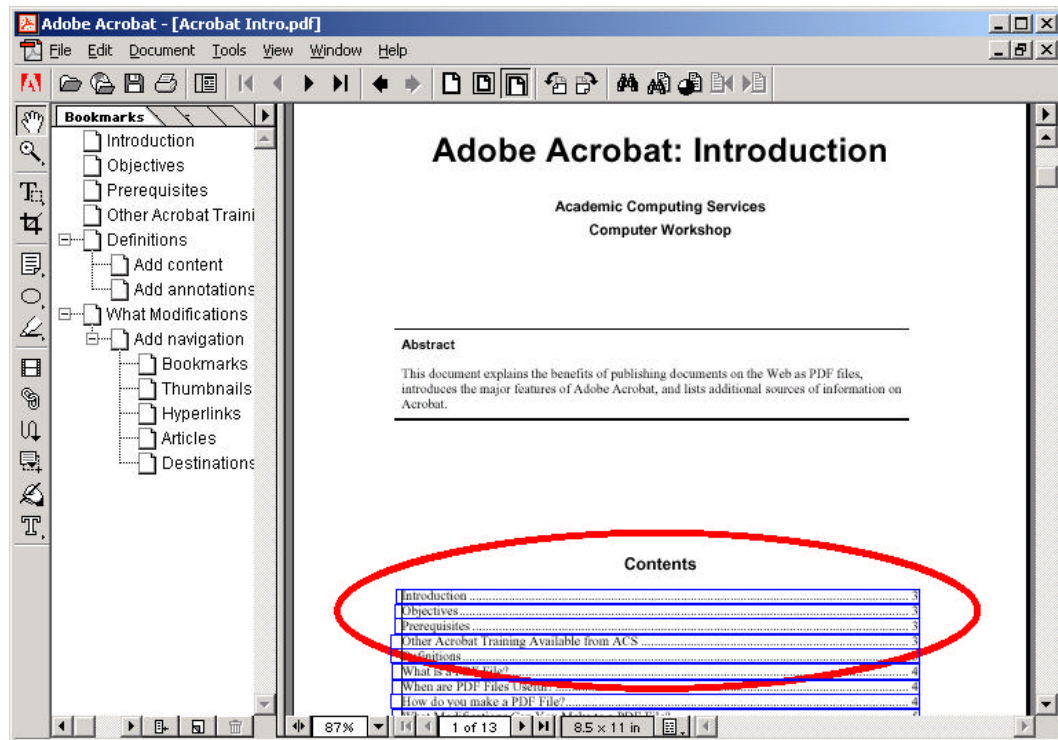
4. Click the **Thumbnails and Page** radio button, then click **OK** to return to the Acrobat display. Click **File** and select **Save** to save the changes you made.

Links

Links in a PDF file work the same way that hyperlinks do in a Web page: clicking on a link navigates you to the destination of the link, which can be another page in the PDF file, another PDF file, or a Web page. You can even use links to launch a movie or sound file. We'll focus on the two most common types of links, however, links to other pages in the PDF file, and links to Web pages.


Links to other pages in the PDF file

One way to use links in a PDF file is to link items in the table of contents with their destination pages. In this example, the links are circled:

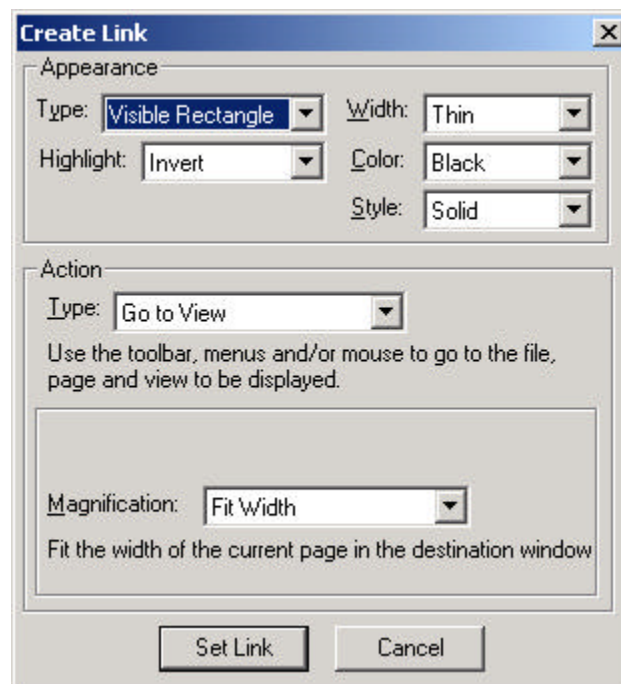


Links (circled) in a PDF file.

To create a link, follow these steps:

1. Navigate to the page in which you want to create a link, then select the link tool () from the vertical toolbar.

2. Next, click and drag with the link tool to draw a rectangle around the text or image you want to use as a link. Once you've drawn the rectangle, you'll see the **Create Link** dialog box:




The Create Link dialog box.

3. Make your **Appearance** selections; these determine whether the link will be visible, and if so, how it will appear (line width, color, solid or dashed).
4. For **Action**, select “Go to View,” and select the magnification you prefer. The Magnification setting determines how the destination page will look when a user clicks the link; if you have no preference, select “Inherit Zoom,” which will use the default magnification.
5. Next, scroll to the destination page for the link, and then click **Set Link**.

Note: If you clicked **Set Link** before scrolling to the destination page, right-click the link and select **Properties**. Click **Edit Destination...**, scroll to the destination page, and then click **Set Link**.

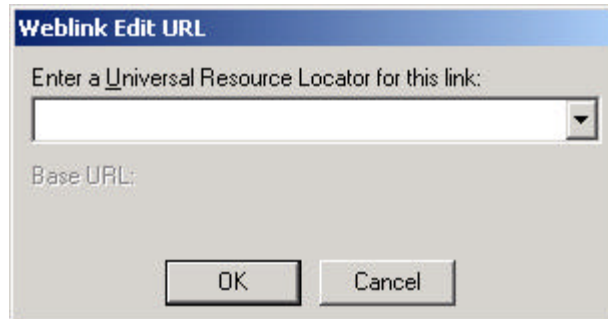
Links to Web pages

To create a link to a Web page...

1. Navigate to the page in which you want to create a link, then select the link tool () from the vertical toolbar.

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2. Next, click and drag with the link tool to draw a rectangle around the text or image you want to use as a link. Once you've drawn the rectangle, you'll see the **Create Link** dialog box.
3. Make your **Appearance** selections; these determine whether the link will be visible, and if so, how it will appear (line width, color, solid or dashed).
4. For **Action**, select "World Wide Web Link," and click **Edit URL...** to display the Weblink Edit URL dialog box.



Weblink Edit URL dialog box.

5. In the dialog box, type in the URL for the destination Web page (for instance, <http://www.ku.edu>). Click **OK**.
6. In the **Create Link** dialog box, click **Set Link**.


Add Multimedia Content

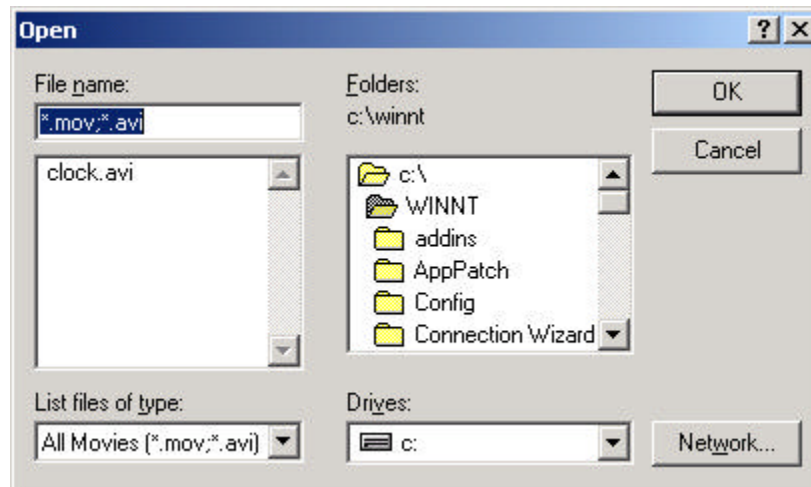
You can use Acrobat add movie and sound clips to PDF files; this is a good feature for PDF files that will primarily be viewed online rather than printed out, since multimedia add-ins will not appear in the printed version of the document.

One important difference between movies and sound in PDF files is that movies are **linked** to the PDF file, while sounds are **embedded** in the PDF file. This means that when you deliver the PDF file (via email or on a Web server, for instance), **you must also deliver any linked movie files**. Since sound clips are embedded, you do **not** need to deliver any additional sound files.

Adding Movies

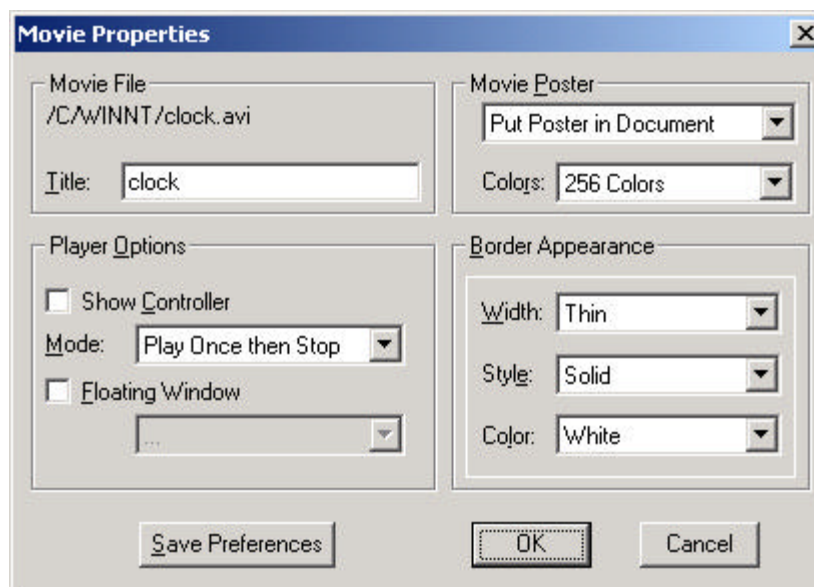
To link a movie to a PDF file...

1. Select the movie tool () from the vertical toolbar, and use it to draw a rectangle on the page in which you want the movie to appear (you will be able change the size and shape of the rectangle later). You will see an **Open** dialog box:



The Open dialog box.

2. Browse to the location of the movie file, select it, and click **OK**. You will see a **Movie Properties** dialog box:



The Movie Properties dialog box

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Movie File – shows the path and file name of the movie you selected, and allows you to enter a title for the movie.

Player Options – selecting **Show Controller** displays the status bar and play/pause button below the movie as it plays. **Mode** controls how the movie will be played. Selecting **Floating Window** launches the movie as a separate window when it is played (rather than embedding it in the PDF page).


Movie Poster – the movie poster is the first frame or image in the movie. Selecting “Put Poster in Document” or “Retrieve Poster from Movie” displays this image where you placed the movie link; selecting “Don’t Show Poster” hides this image.

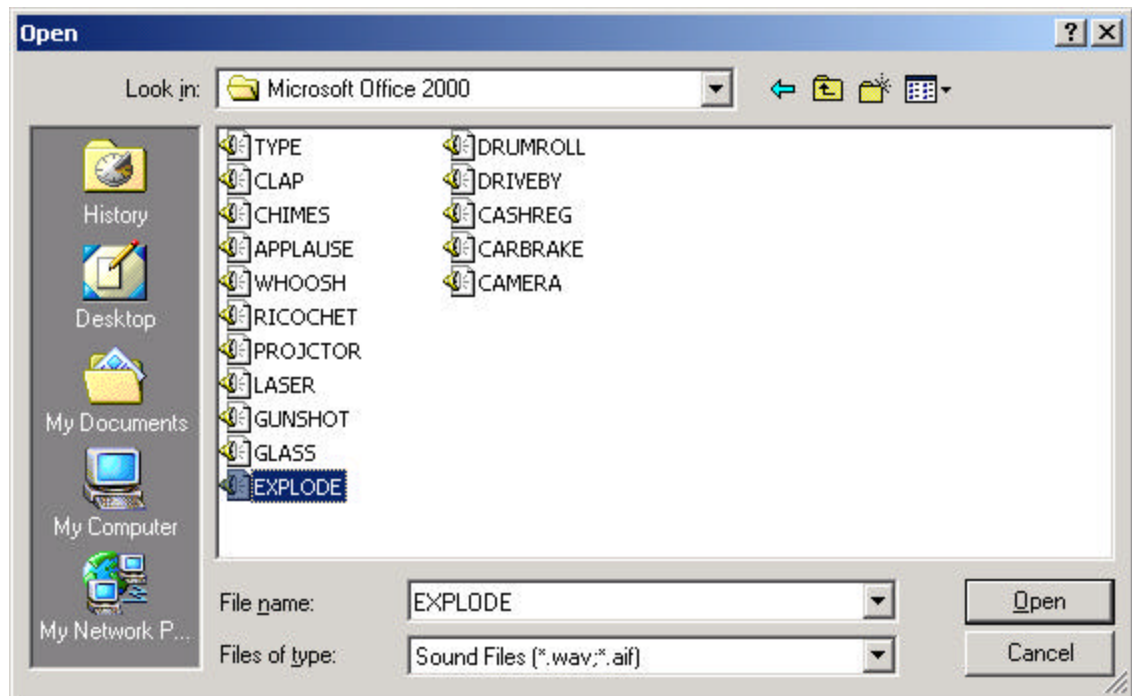
Border Appearance – controls the appearance of the movie link (the rectangle you drew). This link can even be made invisible.

3. After you have made your selections, click **OK**.

Adding Sound

To embed a sound clip in a PDF file...

1. Navigate to the page in which you want to create a link, then select the link tool () from the vertical toolbar.
2. Click and drag with the link tool to draw a rectangle around the text or image you want to use as a link. Once you’ve drawn the rectangle, you’ll see the **Create Link** dialog box.
3. Make your **Appearance** selections; these determine whether the link will be visible, and if so, how it will appear (line width, color, solid or dashed).
4. For **Action**, select “Sound,” and click **Select Sound...** to display the **Open** dialog box.



Selecting a sound file in the Open dialog box.


5. Browse to find the sound file you wish to use, and click **Open**.
6. In the **Create Link** dialog box, click **OK**.

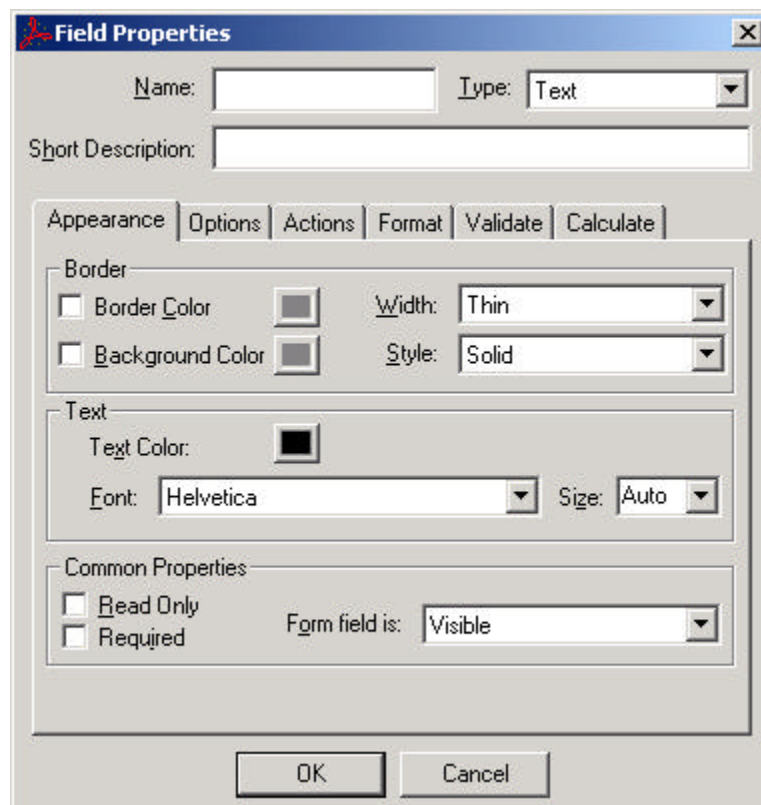
Add Form Fields

Form fields are useful for PDF versions of print forms. Adding form fields to a PDF file allows the user to fill out the form online, then print, sign, and return it.

Note: PDF forms can also be set up to submit form data electronically. To do this, however, you will need a CGI program to receive and process the form data. Consult the *Adobe Acrobat Guide* (the online manual included with Acrobat), or *Adobe Acrobat Classroom in a Book* for details about creating PDF forms for electronic submission.

To add form fields to a PDF file...

1. Select the form tool () and use it to draw a rectangle for the form field. You will see a **Field Properties** dialog box:



The Field Properties dialog box.

2. Enter the name of the field, such as “Social Security Number,” “Employee Name,” or “Date of Birth.”
3. Select the type of form field:

Button – used to perform one specific action, such as clearing the form or submitting it.

Check Box – allows users to select an item.

Combo Box – creates a drop-down list of choices that you specify (such as “yes,” “no,” and “not sure”).

List Box – works like a Combo Box, except the user scrolls to select an item on the list (rather than clicks to view a drop-down list).

Radio Button – similar to a check box, except radio buttons can be set so that only one item in a list can be checked (such as “undergraduate” or “graduate”).

Signature – used to create a digital signature field. **Note:** in order to digitally sign a document, users **must** have either Adobe Acrobat or Adobe Acrobat Business Tools. **Do not use Signature fields if your users will only have access to the Acrobat Reader.**

Text – creates a box where the user can enter text (such as their name or address, for example).

4. Configure the form field. For combo and list boxes, you’ll need to enter all the choices that will be listed; for buttons, you’ll need to define the action of the button (clear the form, submit the form, launch a Web page, and so on). Consult Adobe Acrobat documentation for details on configuring form fields. When you’re finished configuring, click **OK** to close the **Field Properties** dialog box.

Converting a PDF File to Rich Text Format

The ability to convert a PDF file into Rich Text Format (RTF) or other file types is a new feature in Acrobat 5.0.

To convert a PDF file to RTF,

1. Open the PDF file in Acrobat 5.0.
2. Click the **File** menu, and choose **Save As...**
3. Change the “Save as type” setting to “Rich Text Format (*.rtf).”
4. If necessary, rename the file in the “Object name” box, and choose the location in the “Save in” box, then click **Save**.

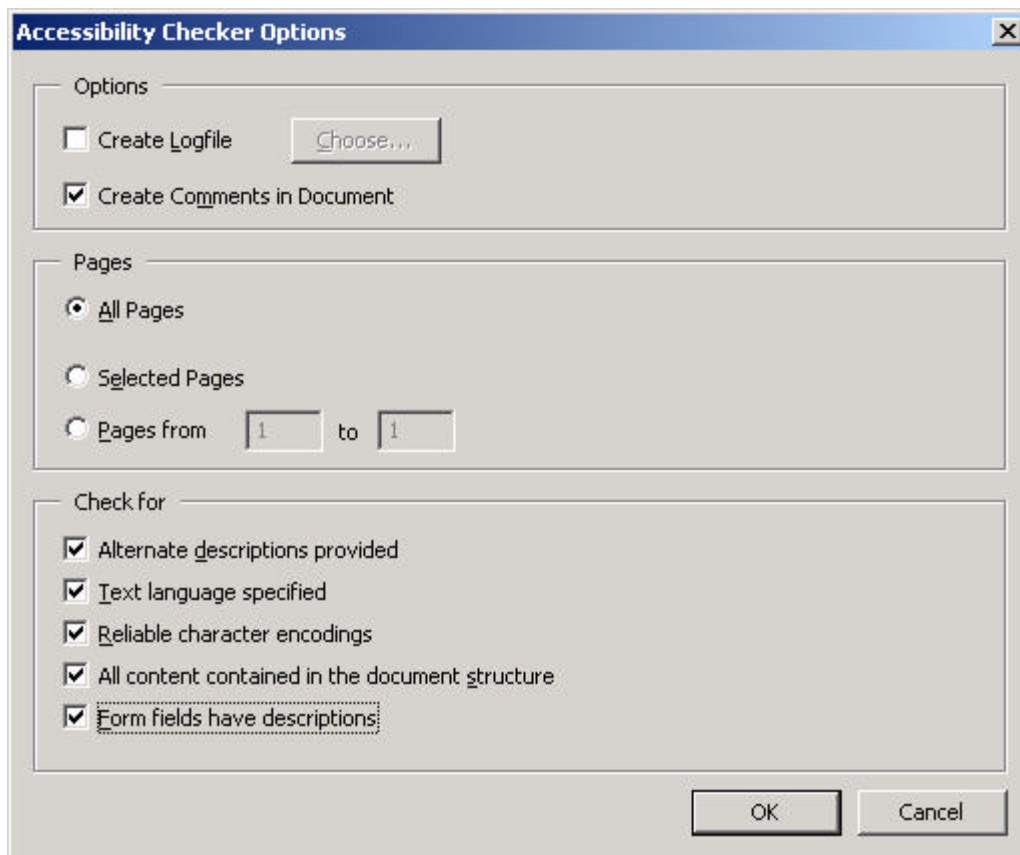
Note: Although this feature can convert most PDF files to RTF, you will get the best results from converting tagged PDF files created with Acrobat 5.0 (see **Error! Not a valid result for tab** on page 21 for more information).

PDF files created using earlier versions of Acrobat or created without tags may lose some formatting when converted (such as table structure and style settings).

Checking a PDF File for Accessibility

To see whether a file is accessible to screen readers and similar devices,

1. Open the PDF file in Acrobat 5.0.
2. Click **Tools** and choose **Accessibility Checker...**



3. In the Accessibility Checker dialog box, choose the reporting options you want.

Selecting “Create Logfile” will cause Acrobat to create a text file with the report; selecting “Create Comments in Document” will cause Acrobat to highlight problem areas in the PDF file, and insert the report as comments embedded within the PDF file itself. Selecting neither will cause Acrobat to place the report in a popup dialog box.

Items under “Check for” determine which accessibility issues will be checked.

4. Click **OK** to create and view the accessibility report.

Note: For more information on accessibility issues, see the bibliography for the ACS workshop “Web Authoring: Improving Web Accessibility” at

<http://www.ku.edu/acs/docs/wkshop/wa-imp-access-biblio.pdf>

or the Web Content Accessibility Standards for the State of Kansas at

<http://da.state.ks.us/itec/WASPriorities112001.htm>

Making an Accessible PDF File

Prior to Acrobat 5.0, PDF files could not be read in screen readers and other devices designed for people with impaired vision or limited mobility.

With version 5.0, however, Acrobat users could create **tagged PDF files**, which contained information about the document (metadata) that made them readable to screen (i.e., text-to-speech) readers and similar accessibility tools. As an added bonus, tagged PDF files can also be more easily read on a wider variety of devices, such as handheld computers.

There are two ways to create a tagged PDF file:

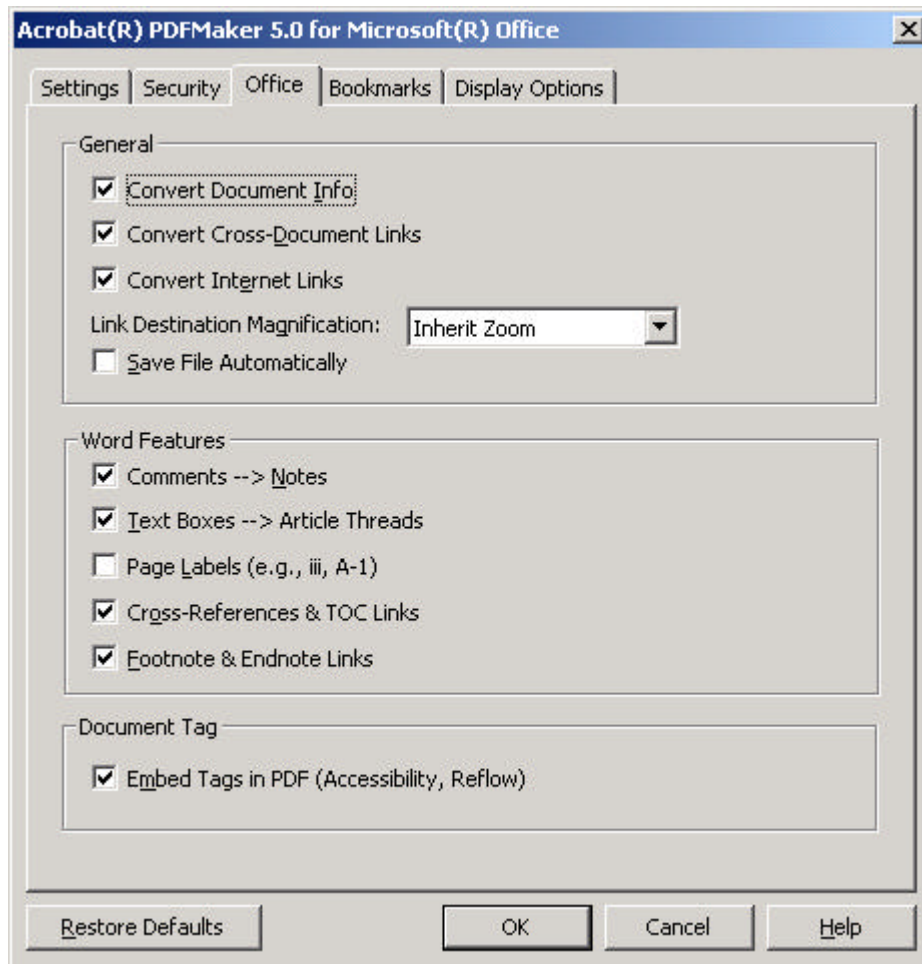
1. Create a PDF file from a Microsoft Office for Windows application (such as Word, Excel, or PowerPoint), using Acrobat PDFMaker 5.0, with the “Embed Tags in PDF” option selected in the Office tab of the Conversion Settings dialog box; or
2. Convert a Web page into a PDF file by using the “Open Web Page” feature in Acrobat 5.0, with the “Add PDF Tags” option selected in the conversion settings for the page.


Creating a tagged PDF file from a Microsoft Office for Windows Application

1. Open the source file in the Microsoft Office for Windows application (Word, Excel, etc.).
2. Click the **Acrobat** menu and choose **Change Conversion Settings...**

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3. Click the **Office** tab; at the bottom of the dialog box, check “Embed Tags In PDF (Accessibility, Reflow).”

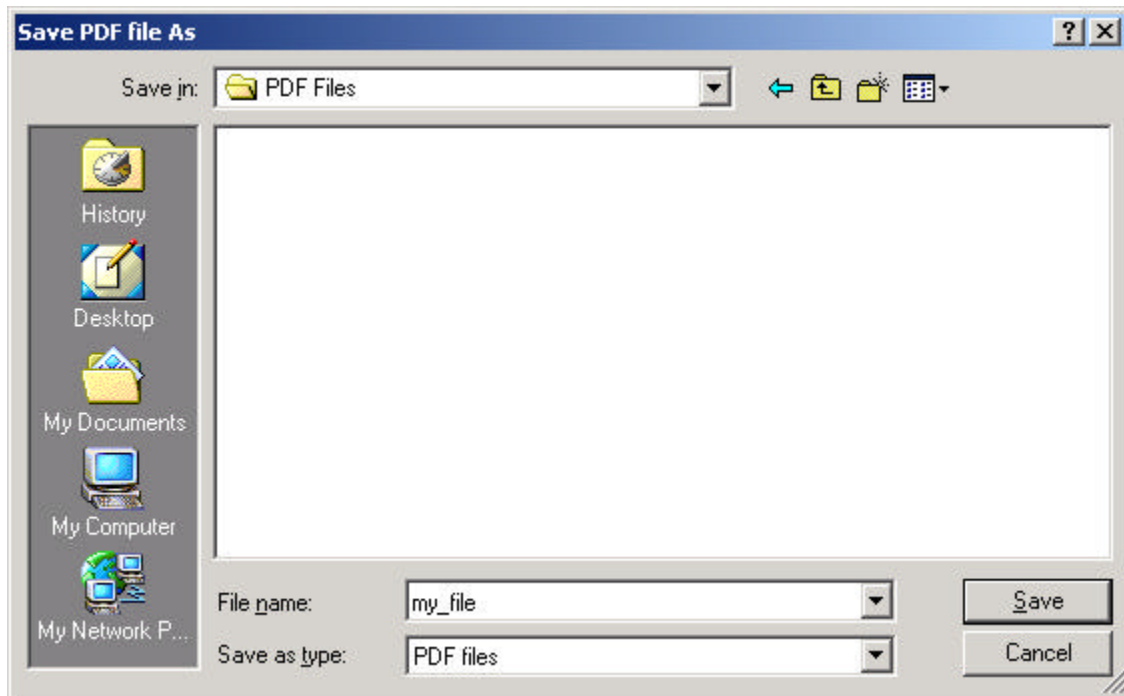


4. Click **OK**.
5. Click the “Convert to Adobe PDF” macro () on the toolbar, or click the **Acrobat** menu and choose “Convert to Adobe PDF”.

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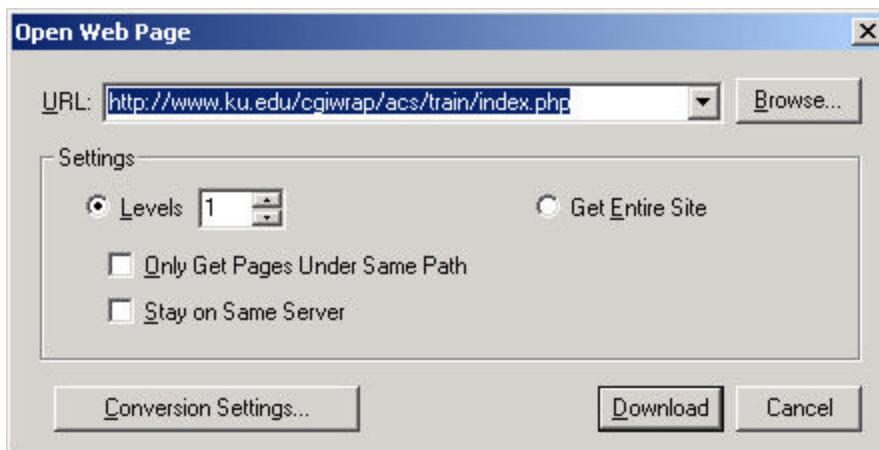
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6. If necessary, rename the file and choose the location in which to save the file, and click **Save**.



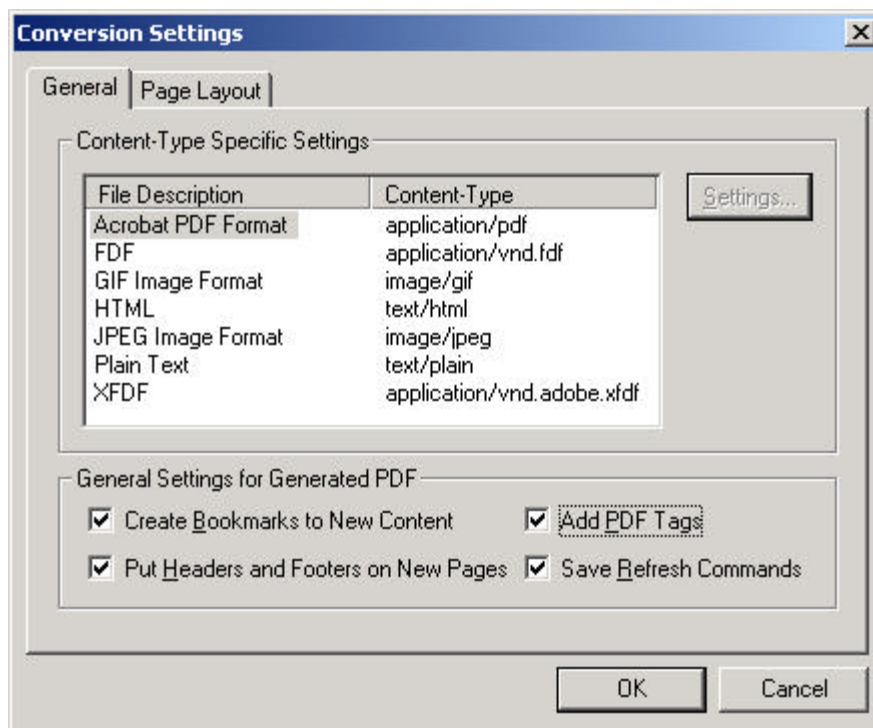
Converting a Web page into a tagged PDF file

1. Open Acrobat 5.0.
2. Click **File** and choose **Open Web Page...**



3. Type or paste in the URL of the page you wish to convert.
4. Click **Conversion Settings...**

5. In the **General** tab, check “Add PDF Tags,” and click **OK**.



6. Back in the **Open Web Page** dialog box, click **Download**.
7. Once the page has loaded in the Acrobat window, click **File** and choose **Save**. Then, if necessary, rename the file and choose the location in which to save the file, and click the **Save** button.

For More Information

Here are some additional sources of information about Adobe Acrobat and PDF files:

Print

Acrobat 5.0

Adobe Acrobat 5.0 Classroom in a Book by Adobe Creative Team (Adobe 2001)

Adobe Acrobat 5 PDF Bible by Ted Padova (IDG 2001)

PDF with Acrobat 5: Visual Quickstart Guide by Jennifer Alspach (Peachpit Press 2001)

Acrobat 4.0

Adobe Acrobat 4.0 Classroom in a Book, 2nd Edition by Adobe Creative Team (Adobe 2000)

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Acrobat PDF and Workflow InDetail by Frank Romano (Prentice Hall 2000)

Acrobat® PDF Bible by Ted Padova (IDG 1999)

Postscript and Acrobat/PDF Bible: Applications, Troubleshooting, and Cross-Platform Publishing by Thomas Merz (Springer Verlag 2001 – not available until Feb. 2001)

Acrobat 3.0

Web Publishing With Acrobat/PDF by Thomas Merz (Springer Verlag 1998)

PDF Printing and Workflow by Frank Romano (Prentice Hall 1998)

Online

Adobe Acrobat Help (the online manual included with Acrobat)

Adobe CustomerFirst Support (<http://www.adobe.com/support/main.html>)

PDFzone (<http://www.pdfzone.com/index.asp>)

Planet PDF (<http://www.planetpdf.com>)

Getting Additional Help

Academic Computing Services provides consulting and Q&A help in a variety of ways:

785/864-0200

question@ku.edu

www.ku.edu/acs/help

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