INTRODUCTION TO ADOBE ACROBAT PDFs

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What is a PDF? And why do I need to know?

PDF stands for portable document format. A portable document format (PDF) can be read on any computer and any platform (Windows, Mac, Unix). There are a variety of programs which read PDFs, the most common being Adobe systems such as Adobe Acrobat Professional, Adobe Reader, Adobe inDesign, etc.

PDFs are particularly useful for those in the information fields. Once a file or document is converted to a PDF, the "look" is preserved exactly as it was intended. This includes fonts, spacing, marginal notes, etc. Another positive function of PDFs is the ability to compress the files. This function is handy in the case that you are putting together a large document with text and graphs and which needs to be emailed to fellow classmates. Hey, nobody likes one document to take up a large portion of email space!

Objectives:

- •Learn to create static PDFs on PC or Mac
- •Learn to add edit functions to static PDFs on PC or Mac

A LITTLE BIT ABOUT ADOBE

What are the uses of the different Adobe products?

There are many different Adobe products. The ones you will use in this tutorial are Adobe Acrobat Reader, Adobe Acrobat Professional, and Adobe Acrobat InDesign. Adobe Acrobat Reader is a product that can be downloaded for free from the Adobe website, http://www.adobe.com. In this program, you can read and print PDFs. Adobe Acrobat Professional is the most versatile program for the beginning user. In this program, you can create static PDFs. You can also edit or add comments to PDFs. Adobe Acrobat Designer is the program in which you create dynamic PDFs.

DEFINITIONS

PDF: Portable Document Format. A document that can be read on any type of computer and on any platform as long as the reading software is available. Example: Adobe Acrobat Reader or Adobe Acrobat Professional

Freeware: This is software that is free to download. However, users are not allowed to access or change the program code. Example: Adobe Acrobat Reader

Static: Unchanging. Example: the text of a scanned file

CREATING STATIC PDFs

There are several ways to create static PDFs. You can:

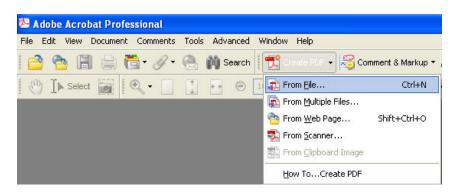
- •create a PDF by converting a file
- •create PDF by converting multiple files
- •create PDF by converting a website
- •create PDF by scanning a document

CREATE PDFs FROM FILE

There are three different ways to create a PDF from a file. It all depends on what program you are starting from. If you want to convert a saved file (any program) to a PDF, use Method 1. If you have a Microsoft Office application open (Word, Excel, etc.), use Method 2. If you have any other application open (Text Edit, etc.), use Method 3.

METHOD 1: This is the most basic method of converting a saved file to a PDF. The saved file can be saved in a variety of programs, from any of the Microsoft Office products to the very basic text editing programs, like TextEdit.

First, open Adobe Acrobat Professional. On the icon toolbar, you will see an icon labeled "Create PDF" tag. Click on this and a menu will appear. Choose the first option, "From File." Alternatively, you can type Control + N. (On Mac, Apple + N).



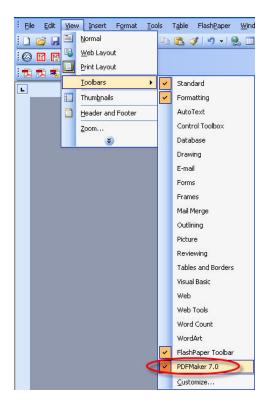
A browse window will pop up, allowing you to search for the file. After you've found the correct file, click on the file name and click Open.

METHOD 2: Let's say you are working in an open application of one of the Microsoft Office products, (such as Word, Excel, or PowerPoint). You want to convert your source document to a PDF, so you can easily email it. This is an easy method to do that.

Once your source document is open, click on "Convert to Adobe PDF" icon on the Adobe toolbar.



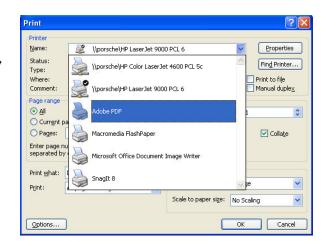
If the toolbar is not visible, got to the View menu, Toolbars, Adobe Acrobat PDFMaker



Once you've clicked on the "Convert to Adobe PDF" icon, a window will pop up asking you to save the file. Only a saved file can be converted. So if you do not agree to save the file when this window pops up, the file that will be converted is the last saved copy of the document. After you have agreed (or not) to save the file, a menu will pop up prompting you to choose a location to save to. After you have chosen your location, click "Save." The file will then convert to a PDF. To view the new PDF, click on "View File," and the document will open in Adobe Acrobat Pro.

METHOD 3: This method could be used when you are in other word processing applications. Let's say you are working on coding HTML in TextEdit. You want a colleague to look at the code and give feedback, but you do not want this colleague to be able to directly edit your text. In this case, converting to a PDF would be important, because your colleague could read the document but could not directly edit it.

First, open your source document. On the tool bar, open the File menu and select "Print" or Control + P. (On Mac, Apple + P). After the Print window pops up, select as your print Adobe PDF and click OK.



A menu will pop up prompting you to choose a file name and a location to save the file. Notice on the bottom of this window that the file is being saved as .pdf.

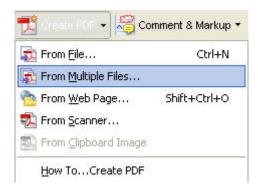


After you have done this, click Save. This step uses a function similar to "save as" to convert the saved file to a saved PDF.

To open the file as a PDF, open Adobe Acrobat Pro. Within the File menu, select Open and browse for the location where you saved the converted file.

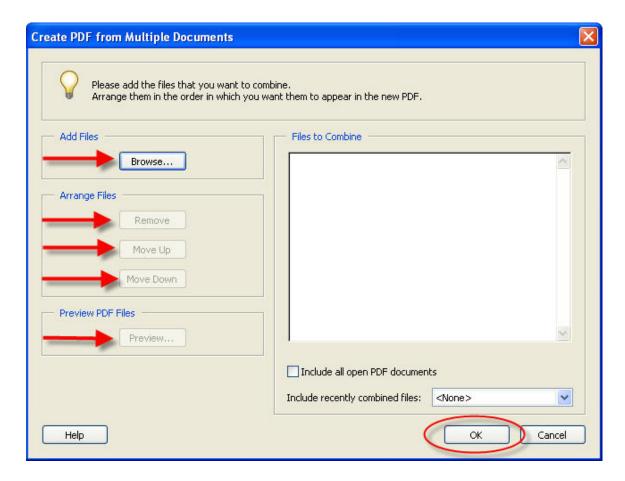
CREATE PDFs FROM MULTIPLE FILES

This function is helpful if you have several documents that you want to combine into one file. Let's say that you've been working on a group project, and each person in the group has saved his/her portion of the project as a PDF. You need to combine all of the PDFs into one file. Here's how to do that.



To start, open Adobe Acrobat Pro. On the icon bar, select the "Create PDF" icon and scroll to the "From Multiple Files" line.

A window will pop up directing you to "Add Files" (or browse for your files). Click on "Choose" and you can then browse for your files. After you have highlighted the file name of the file you want to add, select "Add." Continue this process until you have found all the files you want to combine into one PDF.



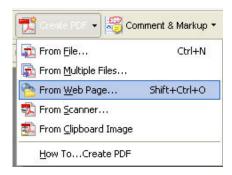
If you need to rearrange how the files are combined into a PDF, the left side of this window allows you to delete, move files up or move files down within the completed PDF. You can also preview the PDF to make sure everything looks just right.

**Note: Creating a PDF from multiple files requires that all files being combined are formatting as PDFs first.

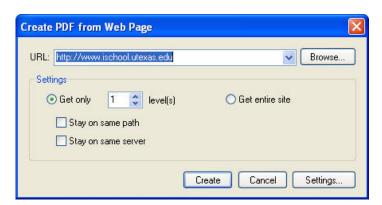
CREATE PDFs FROM A WEBPAGE

In this scenario, let's say you have found an amazing website and want to print it out. A website is made up of multiple webpages, so you'll need to follow the following steps for each webpage.

First, go to the webpage you want converted to a PDF. Then open Adobe Acrobat Pro. On the icon bar, select the "Create PDF" icon and scroll to the "From Web Page" line. Alternatively, you can press Control + O. (On Mac, Shift + Apple + O).



Now a window should pop up, allowing you to enter or browse for the URL address of the webpage you want converted.



Adobe Acrobat Pro will automatically convert the webpage. It may take anywhere from several seconds to a minute or two to convert the webpage, depending on how much and what kind of information is being converted.

Some things to be aware of when converting a webpage:

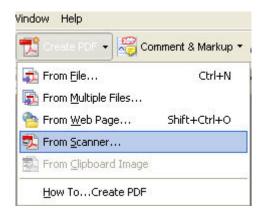
- Webpages often use font sizes larger than what you normally see in a document. So when you convert a webpage, you may be converting text with a font size anywhere from 14-18 points, which will look strange on paper.
- Webpages often use spacing as a way to make text easy to read on a monitor. When a page is converted to a PDF, however, you may see much more space than is normally needed in a printable document.

CREATE A PDF FROM A SCANNED DOCUMENT

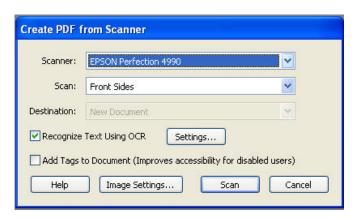
There are several ways to create a PDF from a scanned document. In this tutorial, you will learn the method which is based out of Acrobat Pro. Additionally, this tutorial will specify the process using the scanners available in the iSchool IT lab. Although the basics will probably be the same for most scanners, some variation can be expected.

First, make sure a scanner is hooked up to the PC. The lab scanners connect by USB ports. Also, make sure the scanner is plugged in and turned on.

To begin converting a scannable document to a PDF, go to the "Create PDF" icon on the icon bar and scroll down to "From Scanner."



A window will pop up prompting you to choose a scanner.



Before moving on, let's take a look at this window to find out what everything means:

- *Scanner:* Here you choose which scanner to use. Generally, there will only be one choice unless more than one scanner is connected to the computer you're using.
- *Scan:* Here you decide whether to scan 1 side only (specified as "Front Side") or both sides. The flatbed scanners available in the IT lab can only scan one side at a time.

- *Destination*: For the purposes of this tutorial, "Destination" is not an option. Just as an FYI, however, this option is used if you are scanning a document to be added to a PDF which is already open.
- Recognize Text Using OCR: OCR stands for Optical Character Recognition. This is a process by which a computer can read scanned text as if it was written in computer language.
- *Add Tags to Document*: This is an option by which tags can be added to documents as headings, thereby facilitating an increased accessibility for disabled users.

For the purposes of this tutorial, choose a scanner and click "Scan."

Here, the scanner software will temporarily take over. In the lab, this is Epson software. Follow the prompts through until your document has been scanned. (This will consist of 2 processes: the first scan tells the software what kind of graphics are on the document: black/white or color, text only, line art (this means simple graphics like graphs), or photgraphs and how the software should accommodate this structure. The second scan actually scans the document into a file.

After the document is scanned, a window will pop up prompting you to continue with further scanning or not. If you have more pages to scan, click "Next." If you only have one page to scan, click "Done."

After clicking "Done," your scanned document will appear as a PDF.



EDITING STATIC PDFs IN ADOBE ACROBAT PRO ON PCs

Adobe Acrobat Pro includes editing functions on its toolbar. *Editing functions* in this case means mark-up capabilities. Although Acrobat Pro has the function to actively edit a PDF, this tutorial won't address that.

In this portion of the tutorial, you will learn how to:

- Insert, Move, Delete a Comment (aka Notes) window
- Highlight, Underline, Cross-out Text
- View and Hide Comments
- Run Spell-check
- Search PDF

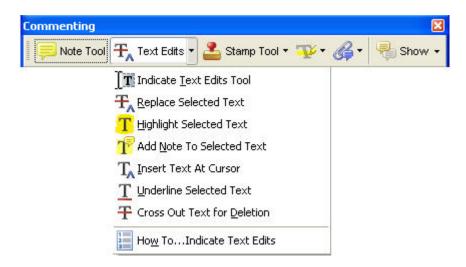
Open Adobe Acrobat Pro. On the icon tool, you will see the *Comment & Markup* icon.



Clicking on the words, not the pull-down menu arrow, will open the Comment toolbar.



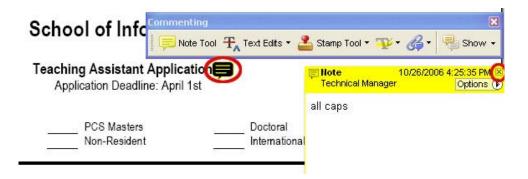
Notice that the Text Edit pull-down menu allows for the user to add a note and the markups to replace, highlight, underline, and cross-out text. Note that text within the PDF must be highlighted in order for all of the options to be available.



For this tutorial, I will be using parts of the old iSchool TA application to illustrate the mark-up processes.

INSERT NOTES

Inserting a note is an effective way to include more substantial comments to a PDF. Think of the notes function as margins in a paper document. There are two ways to insert a note. If you want to place a note where the curser is positioned in the text, you can select the Note Tool tab on the Comment toolbar. Alternatively, if you have text selected, you can select the pull-down menu of the Text Edits tab on the Comment toolbar and select "Add Note To Selected Text." Once the note is inserted, it should look like this:



If you want to *hide the comment box*, click on the "x" in the upper right hand corner (circled in the image above). This causes the window to collapse, leaving the small yellow icon (also circled) signifying that a note has been placed at this point in the text. To view the comment box again, simply click or double click on this same icon.

To *move a comment*, click on the either the comment box (if it is open) or on the comment icon. Drag the box to where you want it moved. Moving a comment does not allow you to insert the comment into another part of the document. It merely repositions where the open comment box appears when maximized.

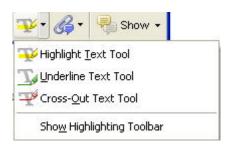
Let's say that a colleague has reviewed your document and inserted comments. You have since looked at the comments and are ready to delete them from your PDF. To *delete a comment*, Control + Click on the open comment box or the comment box icon and select delete from the menu which pops up.

You can follow similar steps to insert, move, and delete notes about *replacing text*, denoted by a carrot, and *deleting text*, denoted by strike-through text followed by a carrot.



HIGHLIGHT, UNDERLINE, DELETE TEXT

These are simple ways to easily draw attention to areas of the text you're marking up. On the comments toolbar, you will see an icon of a T with a pen drawing a line through it. This is the pull-down menu to select if you want to highlight, underline, or delete (meaning strike-through) text.

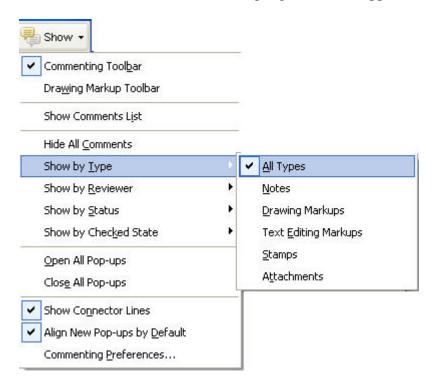


First, select the text you want to mark-up. Go to the toolbar and choose the desired effect. Acrobat Pro will automatically apply the chosen tool to the selected text. That's it!

To undo the highlight, underline, or delete text markups, select the text and Right Click. From the menu which pops up, select Delete. This deletes the markup not the text itself.

VIEW AND HIDE COMMENTS

On the commenting toolbar, the Show pull-down menu allows you to view or hide the comments in your document. To show all types of comments, click on the Show pull-down menu, scroll down to Show by Type and select All Types. This causes all types of comments, from Note windows to highlighted text to appear.



To hide the comments, choose the Show icon from the Commenting Toolbar and scroll down to Hide all comments.

Acrobat Pro has a function to view a list of all the comments apart from the document. This can be helpful if you want either an overview of the comments inserted or if you want to know which portions of the document were most commented on, from consistent grammar errors to comments requesting more analysis, etc. On the far left-hand side of the PDF, you will see several tabs labeled "Bookmarks," "Signatures," etc. The bottom tab reads "Comments." Click on this tab to view a list of all the comments. They are organized in the order by which they appear in the document.



To hide this list of comments, click on the x in the top right-hand corner of this subwindow.

RUN SPELL-CHECK

In Acrobat Pro, the spell-check function applies *only* to the comments you add. To spell-check the original text which was converted to a PDF, check the document's spelling in the source document (Word, TextEdit, etc).

If you want to check the spelling of the comments, go to the Edit menu and select Check spelling.

SEARCH PDF

To search a PDF for a word or phrase, press Apple + F to open the Search toolbar. Enter the word or phrase you want to search for, and Acrobat Pro will search for you.

CONCLUSION

Adobe products, Acrobat Pro in particular, are used in a variety of settings for a variety of purposes. It is an application which is more and more being utilized in the academic setting. Knowing how and when to use Acrobat Pro can save you a lot of time in the long run.

ADDITIONAL RESOURCES

For information directly from the source, go to www.adobe.com or hit the F1 key while an Adobe product is open.

University of Wisconsin – Eau Clair LTS Online Help Collection has a detailed tutorial on Acrobat Pro. http://www.uwec.edu/help/acrobat7.htm