ADOBE® ACROBAT® 8 PROFESSIONAL

USER GUIDE



Adobe PDF

Adobe

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Adobe® Acrobat® 8 Professional for Windows® and Mac OS

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Chapter 1: Before you begin

Installation

Requirements

To review complete system requirements and recommendations for your Adobe® software, see the Read Me file included with your software.

Install the software

1 Close any other Adobe applications open on your computer.

2 Insert the installation disc into the disc drive, and follow the on-screen instructions.

Note: *For more information, see the Read Me file included with your software.*

Activate the software

Adobe software may include license management technology to ensure compliance with the product license agreement. When present, this technology prompts you to verify the license of your product within 30 days after you first use it. Verification is mandatory.

You may be prompted to activate the software. The verification process doesn't collect, transmit, or use any information about the identity of users. For more information on this topic, see the Read Me file on your installation disc, or visit the Adobe website at www.adobe.com/go/activation.

1 If the Activation dialog box isn't already open, choose Help > Activation > Activate.

2 Follow the on-screen instructions.

Note: *If you want to install the software on a different computer, you must first deactivate the software on your computer: Choose Help > Activation > Deactivate.*

Register

Register your product to receive complimentary installation support, notifications of updates, and other services.

❖ To register, follow the on-screen instructions in the Registration dialog box, which appears after you install and activate the software.

If you postpone registration, you can register at any time by choosing Help > Registration.

Read Me

The installation disc contains the Read Me file for your software. (This file is also copied to the application folder during product installation.) Open the file to read important information about the following topics:

- System requirements
- Installation
- Registration

- Electronic licensing
- Legal notices

Using Adobe Help

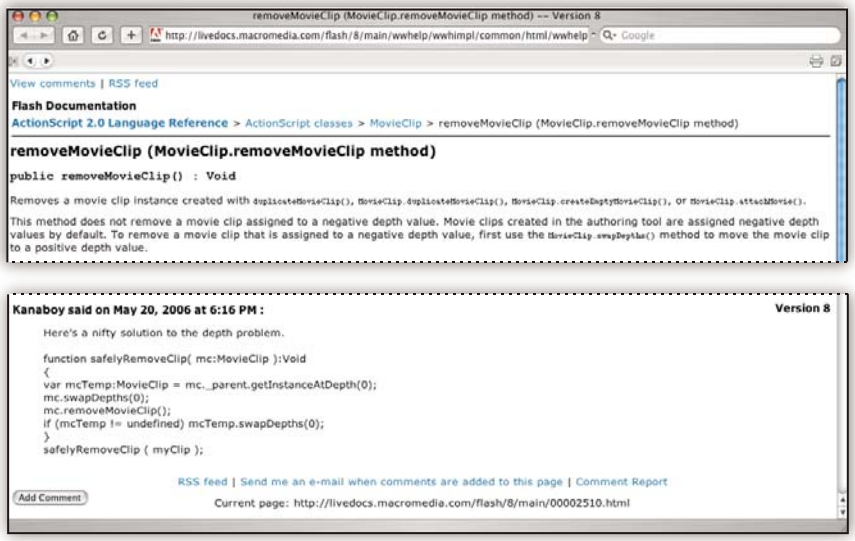
Adobe Help resources

Documentation for your Adobe software is available in a variety of formats.

In-product and LiveDocs Help

In-product Help provides access to all documentation and instructional content available at the time the software ships. It is available through the Help menu in your Adobe software.

LiveDocs Help includes all the content from in-product Help, plus updates and links to additional instructional content available on the web. For some products, you can also add comments to the topics in LiveDocs Help. Find LiveDocs Help for your product in the Adobe Help Resource Center, at www.adobe.com/go/documentation.



Most versions of in-product and LiveDocs Help let you search across the Help systems of multiple products. Topics may also contain links to relevant content on the web or to topics in the Help of another product.

Think of Help, both in the product and on the web, as a hub for accessing additional content and communities of users. The most complete and up-to-date version of Help is always on the web.

How To topics

The How To topics provide a brief overview of the most common tasks. If you need more information, click the link at the bottom of the How To topic to view the related Help topic.

PDF documentation

The in-product Help is also available as an Adobe PDF that is optimized for printing. Other documents, such as installation guides and white papers, may also be provided as PDFs.

All PDF documentation is available through the Adobe Help Resource Center, at www.adobe.com/go/documentation. To see the PDF documentation included with your software, look in the Documents folder on the installation or content DVD.

Printed documentation

Printed editions of the in-product Help may be available for purchase in the Adobe Store, at www.adobe.com/go/store. You can also find books published by Adobe publishing partners in the Adobe Store.

A printed workflow guide is included with all Adobe Creative Suite® 3 products, and stand-alone Adobe products may include a printed getting started guide.

Note: *Printed documentation is not available in all languages.*

Using Help in the product

In-product Help is available through the Help menu. After you start the Adobe Help Viewer, you can access Help for additional Adobe products installed on your computer. Topics may contain links to additional content on the web.

If you search for a phrase, such as "shape tool," enclose it in quotation marks to see only those topics that include all the words in the phrase (applies to roman language versions of the software).

Accessibility features

Adobe Help content is accessible to people with disabilities—such as mobility impairments, blindness, and low vision. In-product Help supports these standard accessibility features:

- The user can change text size with standard context menu commands (Microsoft® Windows®) and standard menu commands (Apple Mac OS).
- Links are underlined for easy recognition.
- If link text doesn't match the title of the destination, the title is referenced in the Title attribute of the Anchor tag. For example, the Previous and Next links include the titles of the previous and next topics.
- Content supports high-contrast mode.
- Images without captions include alternate text.
- Each frame has a title to indicate its purpose.
- Standard HTML tags define content structure for screen reading or text-to-speech tools.
- Style sheets control formatting, so there are no embedded fonts.

Keyboard shortcuts for Help toolbar controls (Windows)

Back button Alt+Left Arrow

Forward button Alt+Right Arrow

Print Ctrl+P

About button Ctrl+I

Help For menu Alt+Down Arrow or Alt+Up Arrow to view Help for another application

Keyboard shortcuts for Help navigation (Windows)

- To move between panes, press Ctrl+Tab (forward) and Shift+Ctrl+Tab (backward).
- To move through and outline links in a pane, press Tab (forward) or Shift+Tab (backward).
- To activate an outlined link, press Enter.
- To change text size, press Ctrl/Command+plus sign (+) or Ctrl/Command+minus sign (-).

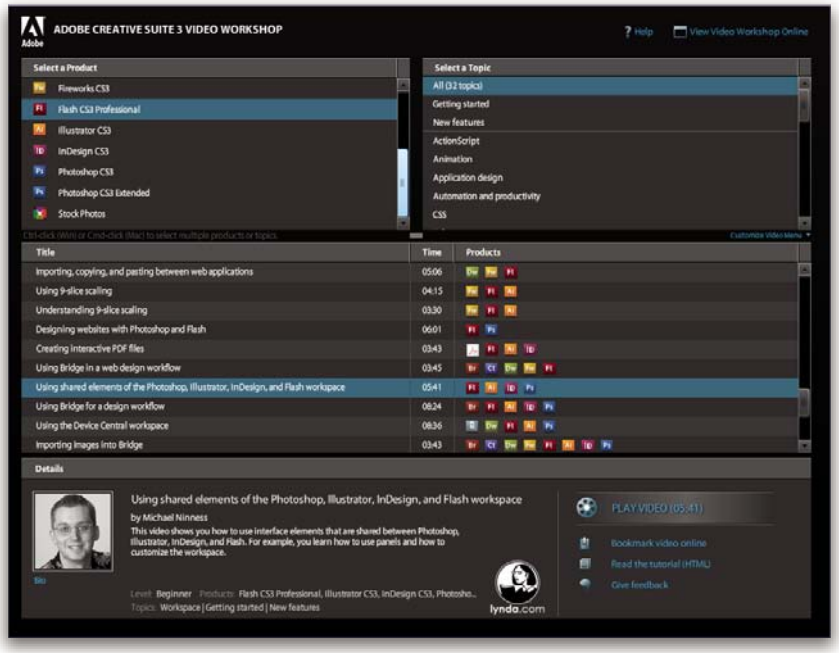
Resources

Adobe Video Workshop

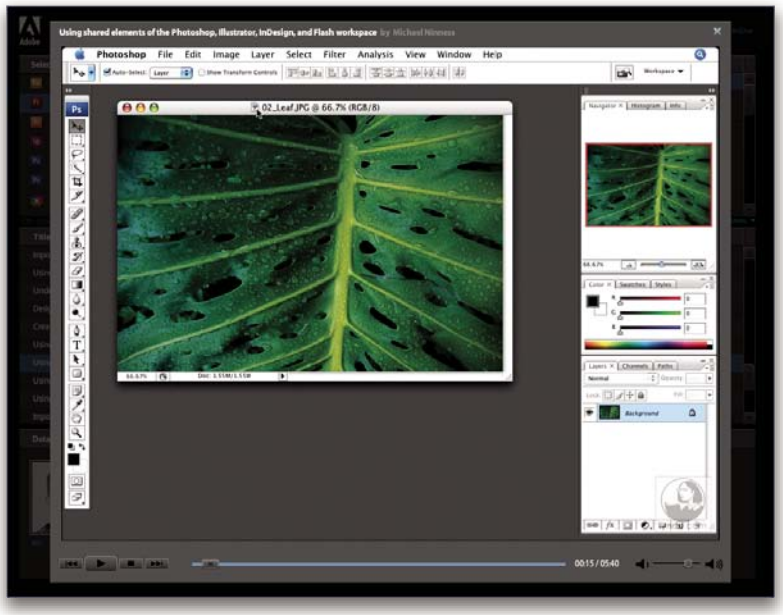
Adobe Creative Suite 3 Video Workshop offers over 200 training videos covering a wide range of subjects for print, web, and video professionals.

You can use Adobe Video Workshop to learn about any Creative Suite 3 product. Many videos show you how to use Adobe applications together.

Note: *Adobe Video Workshop is not available in all languages.*



When you start Adobe Video Workshop, you choose the products you want to learn and the subjects you want to view. You can see details about each video to focus and direct your learning.



Community of presenters

With this release, Adobe Systems invited the community of its users to share their expertise and insights. Adobe and lynda.com present tutorials, tips, and tricks from leading designers and developers such as Joseph Lowery, Katrin Eismann, and Chris Georgenes. You can see and hear Adobe experts such as Lynn Grillo, Greg Rewis, and Russell Brown. In all, over 30 product experts share their knowledge.

Tutorials and source files

Adobe Video Workshop includes training for novices and experienced users. You'll also find videos on new features and key techniques. Each video covers a single subject and typically runs about 3-5 minutes. Most videos come with an illustrated tutorial and source files, so you can print detailed steps and try the tutorial on your own.

Using Adobe Video Workshop

You can access Adobe Video Workshop using the DVD included with your Creative Suite 3 product. It's also available online at www.adobe.com/go/learn_videotutorials. Adobe will regularly add new videos to the online Video Workshop, so check in to see what's new.

Acrobat videos

Adobe Video Workshop covers a wide range of subjects for Adobe Acrobat®, including these:

- Setting up the workspace and taskbars
- Combining files into a PDF
- Converting PDFs
- Modifying PDFs

- Adding comments to PDFs
- Working with shared reviews
- Reviewing and summarizing comments
- Adding security to forms
- Collaborating in real time with Adobe Acrobat Connect™
- Preflighting files
- Printing documents

To access Adobe Creative Suite 3 video tutorials, visit Adobe Video Workshop at www.adobe.com/go/learn_videotutorials.

Note: *Adobe Video Workshop is not available in all languages.*

Extras

You have access to a wide variety of resources that will help you make the most of your Adobe software. Some of these resources are installed on your computer during the setup process; additional content is included on the installation or content disc, if applicable. Unique extras are also offered online by the Adobe Exchange community, at www.adobe.com/go/exchange.

Installed resources

During software installation, a number of resources are placed in your application folder. To view those files, navigate to the application folder on your computer.

Disc content

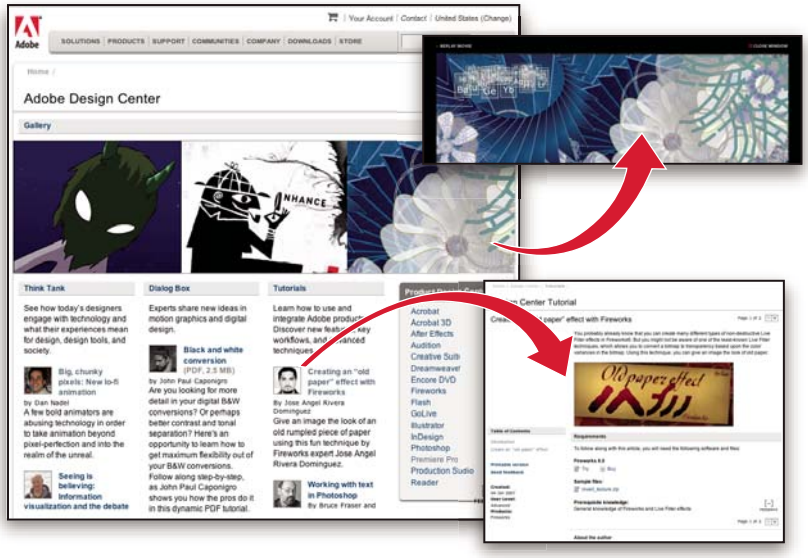
The disc included with your product may contain additional resources for use with the software, such as presets, plug-ins, a PDF version of the Help, technical information, and other documents.

Adobe Exchange

For more free content, visit www.adobe.com/go/exchange, an online community where users download and share thousands of free actions, extensions, plug-ins, and other content for use with Adobe products.

Adobe Design Center

Adobe Design Center offers articles, inspiration, and instruction from industry experts, top designers, and Adobe publishing partners. New content is added monthly.



You can find hundreds of tutorials for design products and learn tips and techniques through videos, HTML tutorials, and sample book chapters.

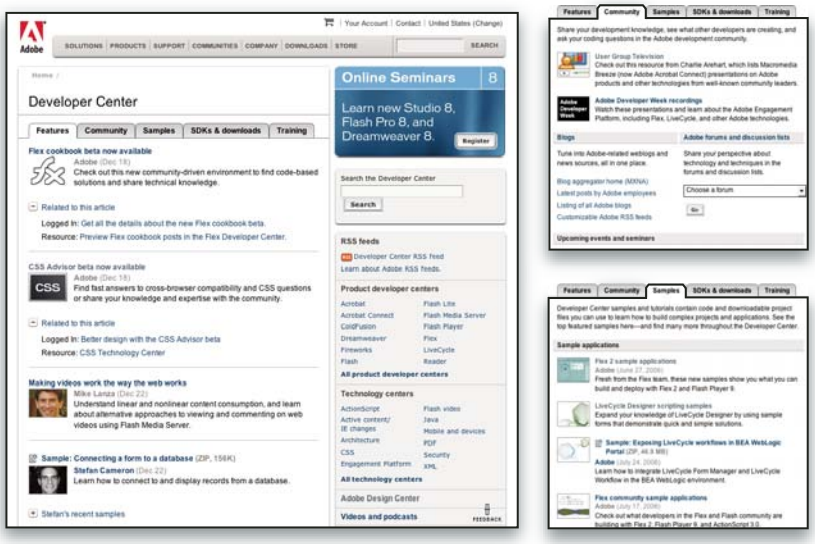
New ideas are the heart of Think Tank, Dialog Box, and Gallery:

- Think Tank articles consider how today's designers engage with technology and what their experiences mean for design, design tools, and society.
- In Dialog Box, experts share new ideas in motion graphics and digital design.
- The Gallery showcases how artists communicate design in motion.

Visit Adobe Design Center at www.adobe.com/designcenter.

Adobe Developer Center

Adobe Developer Center provides samples, tutorials, articles, and community resources for developers who build rich Internet applications, websites, mobile content, and other projects using Adobe products. The Developer Center also contains resources for developers who develop plug-ins for Adobe products.



In addition to sample code and tutorials, you'll find RSS feeds, online seminars, SDKs, scripting guides, and other technical resources.

Visit Adobe Developer Center at www.adobe.com/go/developer.

Customer support

Visit the Adobe Support website, at www.adobe.com/support, to find troubleshooting information for your product and to learn about free and paid technical support options. Follow the Training link for access to Adobe Press books, a variety of training resources, Adobe software certification programs, and more.

Downloads

Visit www.adobe.com/go/downloads to find free updates, tryouts, and other useful software. In addition, the Adobe Store (at www.adobe.com/go/store) provides access to thousands of plug-ins from third-party developers, helping you to automate tasks, customize workflows, create specialized professional effects, and more.

Adobe Labs

Adobe Labs gives you the opportunity to experience and evaluate new and emerging technologies and products from Adobe.

At Adobe Labs, you have access to resources such as these:

- Prerelease software and technologies
- Code samples and best practices to accelerate your learning
- Early versions of product and technical documentation

- Forums, wiki-based content, and other collaborative resources to help you interact with like-minded developers

Adobe Labs fosters a collaborative software development process. In this environment, customers quickly become productive with new products and technologies. Adobe Labs is also a forum for early feedback, which the Adobe development teams use to create software that meets the needs and expectations of the community.

Visit Adobe Labs at www.adobe.com/go/labs.

User communities

User communities feature forums, blogs, and other avenues for users to share technologies, tools, and information. Users can ask questions and find out how others are getting the most out of their software. User-to-user forums are available in English, French, German, and Japanese; blogs are posted in a wide range of languages.

To participate in forums or blogs, visit www.adobe.com/communities.

What's new

Viewing, navigating, and searching

Getting Started window At a glance, see the main features of Adobe® Acrobat® 8 Professional and click links to start tasks or learn more about features. See "Start in the Getting Started window" on page 19.

Maximized work area View PDFs in a new visual design for the work area, navigation pane, and toolbars. User interface elements have been removed to maximize space. See "View the work area" on page 15.

Customizable toolbars Easily hide or show individual tools by right-clicking/Control-clicking a toolbar, or use the More Tools dialog box to customize toolbars. See "Display and arrange toolbars" on page 20.

Search enhancements Find words or use advanced search tools, all from the same integrated toolbar. View search results in a floating, resizable panel. Search documents in a PDF package. See "Search features overview" on page 369.

Embedded PDF search index Embed a search index for a specific file directly within the PDF to speed up searching. See "Create and manage an index in a PDF" on page 375.

PDF creation, assembly, and editing

PDF from a blank page Create a blank PDF page and type text onto the page. Format text using formatting controls. Lock the document so that it can't be edited. See "Create a PDF from a blank page" on page 62.

PDF packages Assemble PDF files (including PDF forms) and non-PDF files into a single package. Files aren't modified when packaged, so signatures and security options stay intact. Documents within a package are viewed in the same window. Easily add, delete, or extract documents from the package. Search and print the current or selected document, or all documents within the package. See "About PDF packages" on page 119.

Combined files user interface Combine files into a single PDF with concatenated pages, or assemble files into a PDF package. Choose simple options to control the size of the resulting PDF. See "Combining different types of files" on page 119.

Mail merge to PDF within Microsoft® Word Convert Word mail merge documents to PDF and send them out by email. See "Create PDFs from Word mail merges" on page 80.

Microsoft Excel worksheet enhancements (Windows) Select and order worksheets for conversion. Convert all links and bookmarks. Create PDF/A-compliant files. See "Application-specific PDFMaker settings" on page 85.

Microsoft PowerPoint presentation enhancements (Windows) Convert overlapping shapes and images, action buttons, action settings, and speaker notes. Convert backgrounds to a separate, nonprinting layer. Create PDF/A-compliant files. See "Application-specific PDFMaker settings" on page 85.

Email conversion enhancements Convert an email message or a complete mail folder to PDF from Lotus Notes. Create PDF packages of email from both Microsoft Outlook and Lotus Notes. In Outlook on Windows, convert email archives to PDF packages and automatically archive email on a schedule. See "Convert email messages to PDFs (Windows)" on page 77, "Migrate old Outlook PDF archives to PDF packages (Windows)" on page 79, and "Set up automatic email archiving (Windows)" on page 79.

Scanning enhancements Scan to PDF or PDF/A from a broader range of scanners. Add metadata while scanning. Optimize a scanned PDF. See "Scan a paper document to PDF" on page 63.

PDF/A-compliant files Create PDF/A-compliant files when scanning paper documents and when creating PDFs from Word, Microsoft Excel, Microsoft PowerPoint, Adobe Acrobat Distiller, and the Acrobat Preflight tool.

Bates numbering Apply identifying labels to a batch of related documents—typically legal documents associated with a court case. Bates numbering appears as a header or footer on each page of each PDF in the batch. See "Add a Bates numbering header or footer" on page 128.

Document examination Inspect PDFs for metadata, annotations, attachments, hidden data, form fields, hidden layers, or bookmarks. Remove some or all of the information. See "Examine a PDF for hidden content" on page 248.

Headers, footers, watermarks, and backgrounds Save header, footer, watermark, and background options as named settings for reuse. Remove or update existing headers, footers, watermarks, and backgrounds. Shrink content to accommodate headers and footers. Preview changes in real time. Set underline text. See "Add and edit headers and footers" on page 125.

Review and commenting

Acrobat Connect meetings Access the real-time, web-based collaboration capabilities of Acrobat Connect (sold separately). Click the Start Meeting button to escalate from a document review to real-time communication with others over the Internet. Acrobat Connect uses Adobe Flash® CS3 Professional and a personal meeting room for screen sharing, audio and video conferencing, whiteboarding, and more. When you first click the Start Meeting button, you can create a free trial account. Each subsequent time, you go directly to your Acrobat Connect personal meeting room. (Acrobat Connect is not available in all languages.) See "Meetings" on page 160.

Shared reviews Initiate a review where comments are stored on a central server, allowing all participants to see comments in real time. No extra server software is needed. Shared reviews work with a folder on a network server, a Windows SharePoint workspace, or a web folder on a web server. Comments are automatically retrieved, even if Reader isn't running and could be added even when you are disconnected from the network. Notifications alert users that there are new comments. Comments from reviewers outside the firewall can be merged into the shared review, and you can enable Reader users to participate in reviews. See "Start a shared review" on page 157.

Review Tracker Provides details about all active reviews. For shared reviews, details include the number of comments from a reviewer, the review deadline, server status, unread reviews, and a summary of updated shared reviews. See "Tracking PDF reviews" on page 165.

Commenting and markup enhancements View and accurately place callout and cloud markups as you apply them. The callout leader automatically moves as you position the callout. Selected comments are highlighted for easier visibility when zoomed out. Rotate stamps and select all tools from a single, integrated toolbar. See "Commenting" on page 168.

Forms

Simple forms creation (Windows) Use a wizard to create PDF forms from templates, existing electronic documents, paper forms, or spreadsheet data. Customize forms with contact information and logos. Edit in Adobe LiveCycle® Designer. See "Creating and editing forms" on page 212.

PDF background artwork Import a PDF as background artwork on a form in LiveCycle Designer. Add form fields on top of the background. See LiveCycle Designer Help.

Forms Tracker Track the forms you initiate or fill out. See "About Forms Tracker" on page 243.

Export and compile form data Aggregate returned forms into a PDF package. Export the form data to a spreadsheet. See "Submitting forms" on page 205 and "Export records from a PDF data set" on page 242.

Form field recognition Automatically recognize form fields on noninteractive PDF documents and convert them to interactive fields that can be filled electronically. See "Creating new forms" on page 212.

Reader-enabled rights Enable Reader 7 and 8 users to fill in, digitally sign, and locally save forms and other PDFs. See "Enable Reader users to save form data" on page 213.

Digital signatures

Roaming IDs Enroll in a signing service where the server holds your private key. Authenticate to the server from Acrobat and allow the document to be signed with your credentials stored on the server. See "Set up a roaming ID account" on page 255.

Signature preview mode and conformance checker Before signing, view the document content as it will appear after eliminating transparency, scripts, fonts, and other dynamic content that can alter a document's appearance. Acrobat automatically runs the Document Integrity Checker, which now includes checking for Qualified Signatures conformance before entering signature preview mode. See "Sign in Preview Document mode" on page 280.

Certificate enhancements Predetermine the signing certificate. Configure the chain model for certificate validation. See "Sharing and managing certificates" on page 258.

Seed values Specify which choices a user can make when signing a document. See "Customizing signature properties using seed values" on page 277.

Signatures in Reader Allow Reader users to draw a signature field. See "Before you certify a PDF" on page 281.

Architecture, engineering, and construction

Batch conversion/direct conversion From Autodesk AutoCAD, convert multiple AutoCAD files to multiple PDFs. Convert AutoCAD files to PDF with improved speed. See "Convert AutoCAD files to PDF (Windows)" on page 83.

DWG/DWF support 2D Measurement tool enhancements Measurement is recalculated if start or end points move. Measurements snap to lines, intersections, or corners. See "Measure the height, width, or area of objects" on page 43.

Legal

Redaction tools Mark text, images, and sensitive areas for redaction. Permanently apply redaction. Modify the appearance of redaction marks, including color and codes. See "Redact sensitive content" on page 249.

Search and redact From within the Search feature, mark some or all search results for redaction. See "Search and redact words" on page 250.

Bates numbering Apply identifying labels to a batch of related documents—typically legal documents associated with a court case. Bates numbering appears as a header or footer on each page of each PDF in the batch. See "Add a Bates numbering header or footer" on page 128.

Creative professional

Color management improvements In Adobe Creative Suite, synchronize settings for on-screen color across the applications with a single click. See "Synchronize color settings across Adobe applications" on page 406.

Shared transparency flattener presets Define flattener presets in one Adobe application, such as Acrobat, and then easily share those swatches with other applications, such as Adobe Illustrator® and Adobe InDesign®. See "Create a flattener preset" on page 470.

Preflight Locate, modify, or remove PDF elements using customizable fixup profiles. Create an inventory of PDF content, including Extensible Metadata Platform (XMP) metadata. Perform advanced inspections on Cos objects and fonts. Convert to and validate PDF/X-4 and PDF/A files. Edit droplet settings for automated preflight inspections. See "Correcting problem areas" on page 493 and "Advanced inspections" on page 482.

Booklet printing Print pages as a simple booklet, such as 2-up, saddle-stitched. See "Print a booklet" on page 429.

Metadata in documents and objects Maintain and access document and object-level metadata. See "Document properties and metadata" on page 356.

TouchUp Object tool enhancement See and change the color space of a selected object. Scale, rotate, or clip an object. See "Move or edit an object" on page 351.

Additional new features

FIPS mode Version 8.1 of Acrobat provides a FIPS mode to restrict data protection to Federal Information Processing Standard (FIPS) 140-2 approved algorithms using the RSABSAFE Crypto-C 2.0 encryption module with FIPS 140-2 validation certificate 608. See "Securing PDFs in FIPS mode (Windows)" on page 264.

Microsoft Windows Vista™ support Version 8.1 of Acrobat supports Windows Vista.

Installing Acrobat on 64-bit versions of Windows Version 8.1 of Acrobat supports the 64-bit versions of Microsoft Windows XP and Windows Vista.

Version Cue 2.0 Manage files and versions as a single user or in a small workgroup. Integrate with Adobe Bridge to manage files for your Creative Suite projects. See "Adobe Version Cue" on page 512.

Digital Editions Read and organize eBooks and other publications with Adobe® Digital Editions (a separate product). When you first click the Digital Editions menu item, you can download and install the Adobe Digital Editions software. After installation, choose Digital Editions to go directly to your Adobe Digital Editions bookshelf. See "Adobe Digital Editions" on page 53.

Printing over the Internet Print documents to a FedEx Kinkos office in the United States. See "Print over the Internet" on page 425.

2D Measurement tool enhancements Measurement is recalculated if start or end points move. Measurements snap to lines, intersections, or corners. See "Measure the height, width, or area of objects" on page 43.

Chapter 2: Workspace

As you get acquainted with Adobe® Acrobat® 8 Professional, make setting up your Acrobat work environment a priority. The more you learn about its potential, the better you can take advantage of its features, tools, and options.

There's much more to the application than you see at first glance. Acrobat has hidden tools, preferences, and options that can enhance your experience and give you greater control over how your work area is arranged and displayed.

Quickstart

Customize the work area

You can change the work area to suit your needs.

- To change the toolbars that appear, choose View > Toolbars, and select the desired toolbars.
- To change the navigation pane view, click one of the buttons to the left of the navigation pane.
- To customize the display colors for page background and document text, choose Edit > Preferences > Accessibility.
- To set the default zoom level and page layout, choose Edit > Preferences > Page Display.

See also

"Customizing the work area" on page 19

Move a toolbar

Some toolbars, such as the Tasks toolbar, appear in the toolbar area. Others, such as the Comment & Markup toolbar, open as floating toolbars.

❖ To move a toolbar, drag the grabber bar at the left edge of the toolbar:

- Drag a toolbar to a new location in the toolbar area.
- Drag a toolbar out of the toolbar area to create a floating toolbar.
- Drag a floating toolbar into the toolbar area.

See also

"Display and arrange toolbars" on page 20

Add tools and toolbars

You can customize Acrobat to display the tools and toolbars you use most often.

❖ Right-click/Control-click a toolbar and do any of the following:

- Select the buttons you want to display.
- Choose Hide Toolbars and select the toolbars you want to hide.

• Choose More Tools, and select the toolbars and buttons you want to display.

See also

"Show and hide toolbar elements" on page 22

Change the look of a tool or object

You can easily change the properties for many tools and objects, including comments, form fields, and bookmarks.

1 Right-click/Control-click the tool or object you want to change.

2 Choose Properties or Tool Default Properties.

3 Set the desired properties.

To apply an object's settings to all subsequent objects of the same type, right-click/Control-click the object and choose Make Current Properties Default or Use Current Properties As New Defaults.

See also

"Review properties for tools and objects" on page 22

Change viewing mode

To give you more space for reading a document, you can change the viewing mode.

❖ Choose View > Reading Mode or Full Screen Mode.

In Reading mode, toolbars and the navigation pane are hidden but the menu bar is present. In Full Screen mode, everything but the document is hidden. To exit from Full Screen mode, press Esc.

See also

"View PDFs in Full Screen mode" on page 30

View PDFs in a package

An Adobe PDF package opens with a list of the PDFs it contains and a PDF package navigation bar.

❖ Open the package and do any of the following:

• To view a PDF, select it from the PDF list or click Open Next or Open Previous .

• To change the position of the PDF list, click one of the list position icons.

• To access package-related commands, click Options and choose the desired command.

See also

"View, sort, and search components in a PDF package" on page 27

View attachments

A PDF may have other PDFs attached to it, either as single files or a PDF package. When you open a PDF containing attachments, the Attachment panel opens automatically.

❖ Double-click the desired PDF. The attachment opens in a new window.

If the attachment is a PDF package, the first PDF in the package opens along with a list of all PDFs in the package. Click a PDF to view it.

See also

"PDFs with file attachments" on page 30

Reduce PDF file size

Reducing the size of PDFs improves their performance—particularly when they're being accessed on the web.

1. Choose Document > Reduce File Size.
2. Select the version compatibility you need, and click OK.
3. Specify a filename and location, and click Save.

If you're certain that all your users use Acrobat 8 or Adobe Reader 8, limiting compatibility to the latest version can further reduce file size.

See also

"Reduce file size by saving" on page 47

Locate PDFs in the Organizer

The Organizer helps you quickly locate PDFs you've previously opened and PDFs you've organized into collections or favorites.

1. Choose File > Organizer > Open Organizer.
2. Click in the categories pane on the left to locate PDFs.

All PDFs found are listed in the files pane. After you locate a PDF, you can use the buttons at the top of the Organizer to work with the file.

See also

"Organizer window overview" on page 47

Work area basics

View the work area

Acrobat opens in two different ways: as a stand-alone application, and in a web browser. The associated work areas differ in small but important ways.

The Acrobat work area includes a *document pane* that displays PDFs and a *navigation pane* on the left side that helps you browse through the current PDF. Toolbars near the top of the window provide other controls that you can use to work with PDFs.

Note: *Opening certain types of PDFs causes specialized parts of the work area to appear: the document message bar and PDF package navigation features. For other types of PDFs, these areas are not seen and not available.*

See also

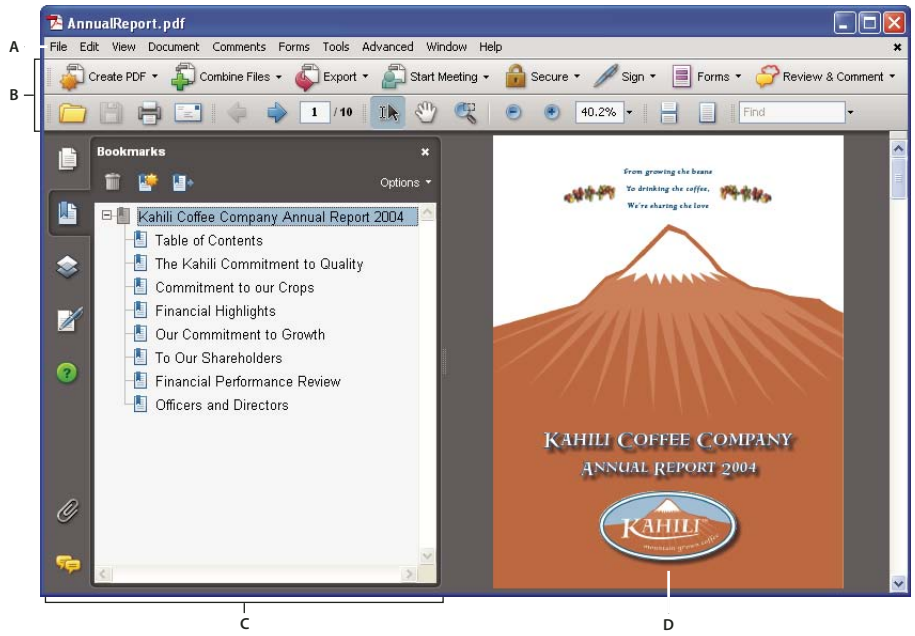
"Document message bar" on page 18

"Navigation areas for PDF packages" on page 18

View the work area for PDFs open in the application

1 Click the Acrobat icon on the desktop, or use the Start menu (Windows) or Finder (Mac OS) to start the Acrobat application.

2 Choose File > Open, navigate to and select any PDF on your computer, and click Open.



Acrobat window
A. *Menu bar* ***B.*** *Toolbars* ***C.*** *Navigation pane (Bookmarks panel displayed)* ***D.*** *Document pane*

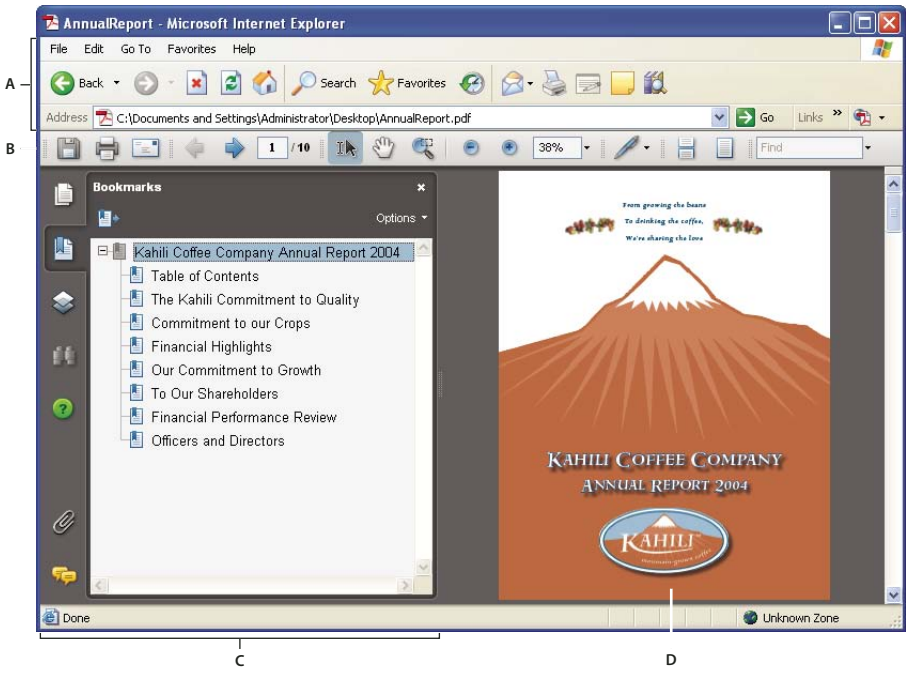
View the work area for PDFs open in a web browser

1 Open a web browser application.

2 Do one of the following:

- Select a PDF anywhere on the Internet and open it.
- Choose File > Open (or Open File). If necessary, choose PDF or All Files in the pop-up menu for the type of file. Then navigate to and select any PDF on your computer or local network, and click Open.

3 Identify items in the work area.



PDF open within a web browser
A. *Web browser application menu bar and buttons* ***B.*** *Acrobat toolbars* ***C.*** *Navigation pane (Bookmarks panel displayed)* ***D.*** *Document pane*

Opening PDFs

You can open a PDF in many ways: from within the Acrobat application, from your email application, from your file system, or on a network from within a web browser. The initial view of the PDF depends on how its creator set the document properties. For example, a document may open at a particular page or magnification.

Some PDFs are restricted and open only after you enter a password provided to you by the PDF owner. If a document is encrypted, you may need the permission of its creator to open it. In the case of some restricted or certified documents, you may be prevented from printing a file or copying information to another application. If you have trouble opening a PDF or can't use certain features, contact its author or owner.

If a document is set to open in Full Screen mode, the toolbar, command bar, menu bar, and window controls are not visible. You can quit Full Screen mode by pressing the Esc key if your preferences are set this way, or by pressing Ctrl+L/Command+L.

See also

"Defining initial view as Full Screen mode" on page 353

"Navigation areas for PDF packages" on page 18

"Open secured PDFs" on page 247

Select another tool

By default, the Select tool is active when Acrobat opens, because it is the most versatile tool.

Specialized tools, such as those for zooming in or adding review comments, are available in toolbars and in the Tools menus.

Select a tool

❖ Do one of the following:

- Select a tool in a toolbar.
- Choose Tools > [*toolbar name*] > [*tool*].

Switch temporarily to the Zoom In or Hand tool

You can use these tools temporarily, without deselecting the current tool.

- To select the Hand tool temporarily, hold down the spacebar.
- To select the Zoom In tool temporarily, hold down Ctrl+spacebar/Command+spacebar.

When you release the keys, Acrobat reverts to the previously active tool.

Document message bar

The document message bar appears only in certain types of PDFs. Typically, you see this area when you open a PDF form, a PDF that has been sent to you for review, or a PDF with special rights or security restrictions. The document message bar appears immediately below the toolbar area, and can be hidden or shown by clicking its button on the left side of the work area.

Look on the document message bar for instructions on how to proceed and for any special buttons associated with the task. The bar is color coded: purple for forms, yellow for reviews, and blue for certified or secure PDFs.



Document message bar for a form

See also

"Filling in PDF forms" on page 201

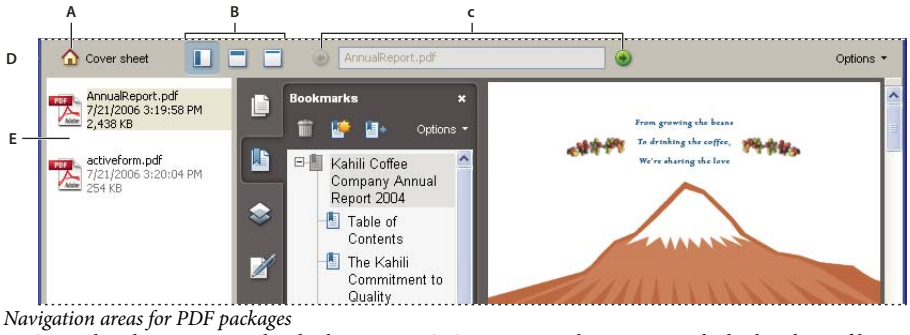
"Commenting" on page 168

Navigation areas for PDF packages

When you open a PDF package, two unique areas appear:

PDF package navigation bar Located immediately below the toolbars area. Look here for the Cover Sheet button, buttons that hide or set the orientation of the list of component documents, buttons for moving to the next or previous component document, and an Options menu with commands for viewing, editing, and using the PDF package.

List of component documents By default, located between the PDF package navigation bar and the document pane, but can be hidden or displayed vertically, to the left of the navigation pane. Selecting a component file in the list opens it in the document pane.



Navigation areas for PDF packages
A. *Cover Sheet button* ***B.*** *PDF list display options* ***C.*** *Open Previous button, currently displayed PDF filename, Open Next button* ***D.*** *PDF package navigation bar* ***E.*** *List of component PDFs (shown vertically)*

See also

"About PDF packages" on page 119

"View, sort, and search components in a PDF package" on page 27

Start in the Getting Started window

The Getting Started window opens by default when you start Acrobat. The home page in this window contains links that open additional pages. All Getting Started pages include buttons and links that start specific tasks or display topics in the full Acrobat Help system (which you are reading now).

You can open or close the Getting Started window, or simply let it remain open behind or beside the Acrobat work area.

Start a task from the Getting Started window

1 On the Getting Started home page, select a task group, such as Create PDF or Review & Comment.

2 Start a task or view a Help topic:

- Click an action text link or button to initiate a task.
- Click an information text link or button to open full Acrobat Help to the related Help topic.

If you decide to try a different task group, click Home in the upper-left corner to return to the Getting Started home page.

Reopen and reset the Getting Started window

1 Choose Help > Getting Started With Adobe Acrobat®.

2 Deselect the Do Not Show At Startup option in the upper-right corner.

Customizing the work area

Displaying menus

Ordinarily, it's a good idea to keep the Acrobat menus visible so that they are available as you work. It is possible to hide them, using the View > Menu Bar command. However, the only way to display and use them again is by pressing F9/Shift+Command+M.

Acrobat also has numerous context-sensitive menus. These menus appear when you right-click/Control-click an element in the work area or PDF that has such a menu associated with it. A context menu displays commands that relate to the item or area that you clicked. For example, when you right-click/Control-click the toolbar area, that context menu displays the same commands as the View > Toolbars menu.

Note: *The Acrobat menu bar appears only if Acrobat is open as a stand-alone application. If Acrobat is open within the browser, only the browser application menu appears at the top of the window. However, context menus are available in both cases.*

About toolbars

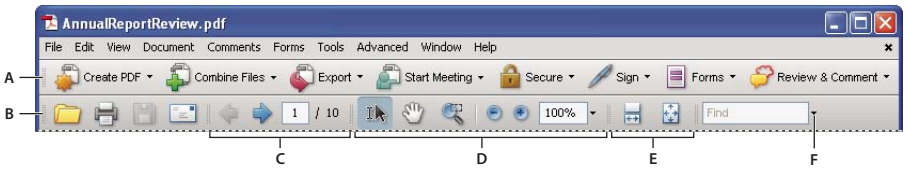
Toolbars reduce clutter in the work area by arranging tools in task-related groups. For example, the Page Display toolbar includes buttons for changing how many pages you can see at a time in the document window. The Comment & Markup toolbar contains tools for reviewing and annotating a PDF.

Any toolbar can *float* or be *docked*. Docked toolbars appear in the toolbar area. Floating toolbars appear as independent panels that you can move anywhere in the work area.

Each toolbar has a *grabber bar*, which is a vertical gray stripe at the left end of the toolbar.

- When you position the pointer over a grabber bar, a tool tip displays the name of the associated toolbar.
- When you drag a grabber bar, the toolbar moves. You can drag toolbars off the toolbar area (so that they float), dock them in the toolbar area, or rearrange them in the toolbar area.

Some toolbars appear by default and some are hidden.



Toolbars open by default
A. *Tasks toolbar* ***B.*** *File toolbar* ***C.*** *Page Navigation toolbar* ***D.*** *Select & Zoom toolbar* ***E.*** *Page Display toolbar* ***F.*** *Find toolbar*

Buttons in the Tasks toolbar behave somewhat differently from other toolbar buttons. Each of these buttons is associated with a menu of commands. Click the arrow to the right of the button name to open the menu. For example, click the arrow next to the Start Meeting button to display a menu of commands related to Adobe Acrobat Connect meetings.

Position the pointer over a tool to see a description of the tool. Position the pointer over the grabber bar on the left edge of a toolbar to see its name. All tools are identified by name in the More Tools dialog box (Tools > Customize Toolbars).

See also

"Customizing the work area" on page 19

"Displaying menus" on page 19

Display and arrange toolbars

When your work does not involve using the tools in a toolbar, you can close the toolbar to tidy up the work area. For example, if you are not adding review comments to a PDF, there's no need to have the Comment & Markup toolbar open.

When you need easy access to a toolbar that is hidden by default, you can open it. This toolbar appears as a floating panel, which you can move or dock in the toolbar area.

Note: *If several PDFs are open, you can customize the toolbars for each PDF independently. The different customized states persist as you switch between PDFs.*

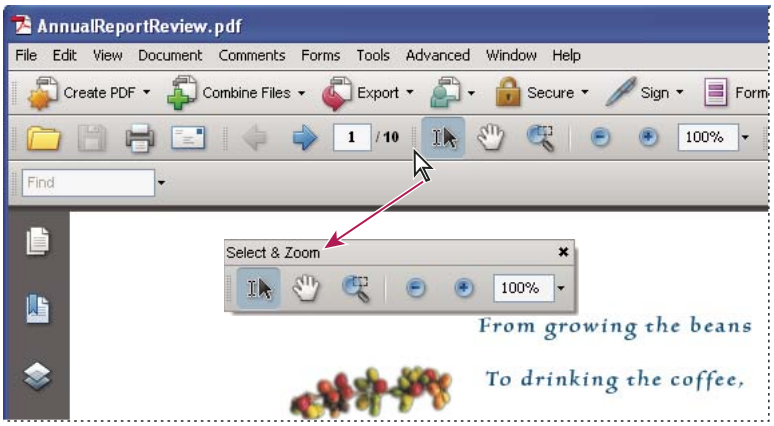
Show or hide toolbars

- To open a toolbar, choose View > Toolbars > [*toolbar name*]. A check mark next to the toolbar name indicates that the toolbar is displayed.
- To hide all toolbars, choose View > Toolbars > Hide Toolbars.
- To change a toolbar that is either shown or hidden, right-click/Control-click the toolbar area, and choose the toolbar you want to show or hide.
- To change the visibility of several toolbars, choose Tools > Customize Toolbars or View > Toolbars > More Tools. Then, select and deselect toolbars. (Check marks by the toolbar names indicate which ones are currently visible.)

Note: *Whether a new toolbar opens as a floating toolbar or docked in the toolbar area depends on its default position or where it appeared in your previous configuration of the work area, if any.*

Move toolbars

- To rearrange the docked toolbars, use the toolbar grabber bars to drag them from one position to another.
- To move a floating toolbar, drag it by its title bar or grabber bar to another location in the work area.
- To float a docked toolbar, drag it by its grabber bar from the toolbar area.



Use the title bar to move a section of tools from the toolbar area.

- To dock a floating toolbar, drag it by its title bar or grabber bar to the toolbar area.
- To move all floating toolbars to the toolbar area, choose View > Toolbars > Dock Toolbars.

Rows may be added to or removed from the toolbar area as you move the toolbars in and out.

Return toolbars to their default configuration

❖ Choose View > Toolbars > Reset Toolbars.

Lock or unlock the toolbar area

Locking the toolbars prevents any rearrangement of the toolbar area, so all grabber bars disappear when the toolbar area is locked. Locking does not affect the positions of any floating toolbars.

❖ Choose View > Toolbars > Lock Toolbars.

Select the command a second time to unlock the toolbar area.

Note: *When the toolbar area is locked, you can still move floating toolbars by dragging them by their title bars. However, you can't dock them unless you unlock the toolbar area.*

About the Properties toolbar

The Properties toolbar looks like any other toolbar and can be moved, docked, or floated in the same way. It also contains buttons and can be hidden or displayed by choosing it by name from the View > Toolbars menu.

The buttons in the Properties toolbar display properties of the currently selected tool or object. Unlike buttons in most toolbars, the buttons in the Properties toolbar can't be hidden. Also, many of the buttons merely display information, so you cannot use them to make changes to the PDF.

Show and hide toolbar elements

You can alter the display within an individual toolbar to keep just the tools you need available with a minimum of wasted space. You can also show and hide tool labels.

Show or hide individual tools

Acrobat includes more tools and more toolbars than the set that appears by default. You can customize the toolbars so that the tools you use most often appear in the toolbar area.

❖ Do any of the following:

- Right-click/Control-click the toolbar, and select a tool that you want to display or deselect a tool that is already displayed if you want to hide it.
- Right-click/Control-click any toolbar and choose More Tools. Then select individual tools and toolbars that you want to display, and deselect those that you want to hide.

Note: *A selected tool appears in the toolbar area only if its toolbar is also selected in the More Tools dialog box.*

Show or hide tool labels

The default view shows labels for some toolbar buttons. You can show labels for all buttons to help you as you learn to use Acrobat, or you can hide all tool labels to save space in the toolbar area.

❖ Choose View > Toolbars > Button Labels > *[option]*.

Note: *Tool labels are turned off selectively when space in the toolbar area becomes limited.*

Review properties for tools and objects

The Properties toolbar provides easy access to the properties for many tools and objects such as links, comments, form fields, media clips, and bookmarks. For example, if you select the Note tool, the Properties toolbar displays the current default properties for that tool. If you select a note in the document, the Properties toolbar displays properties for that note.

You can use the Properties toolbar to change many of the settings that appear there. A few items only provide information and cannot be edited.

Like all toolbars, the Properties toolbar can float or be docked in the toolbar area. The Properties toolbar is different in that it doesn't contain tools and can't be customized to hide options.

1 Do one of the following:

- Choose View > Toolbars > Properties Bar.
- Right-click/Control-click the toolbar area, and choose Properties Bar from the context menu.

2 Select the object or tool that you want to review.

3 Change properties for the selected item, as desired.

If you want to change object properties other than those listed in the Properties toolbar, right-click/Control-click the object, and choose Properties.

Show or hide the navigation pane

The navigation pane is an area of the work space that can display different navigation panels. Typically, these panels act like a table of contents, with items you can click to jump to a specific place in the document. For example, the Pages panel contains thumbnail images of each page; clicking a thumbnail opens that page in the document.

When you open a PDF, the navigation pane is closed by default, but buttons along the left side of the work area provide easy access to various panels, such as the Pages panel button and the Bookmarks panel button. When Acrobat is open but empty (no PDF is open), the navigation pane is unavailable.

1 To open the navigation pane, do one of the following:

- Click any panel button on the left side of the work area to open that panel.
- Choose View > Navigation Panels > Show Navigation Pane.

2 To close the navigation pane, do one of the following:

- Click the button for the currently open panel in the navigation pane.
- Choose View > Navigation Panels > Hide Navigation Pane.

Note: *The creator of the PDF can control the contents of some navigation panels and may make them empty.*

Adjust navigation panels

Like toolbars, navigation panels can be docked in the navigation pane, or they can float anywhere in the work area. You can hide or close panels you don't need and open the ones you do. You can also adjust the width of the navigation pane.

Change the display area for navigation panels

- To change the width of the navigation pane, drag its right border.
- To collapse a floating panel without closing it, click the tab name at the top of the window. Click the tab name again to restore the panel to its full size.

Change the orientation of a docked navigation panel

By default, some panels, such as Bookmarks, appear in a column on the left side of the work area. Others, such as the Comments panel, appear horizontally across the bottom of the document pane. You can change the orientation of any panel to either vertical or horizontal by dragging the button for that panel, which appears on the left side of the work area.

- To orient the panel vertically, drag its button to the upper part of the navigation pane, near the buttons of other vertically oriented panels.

- To orient the panel horizontally, drag its button to the lower part of the navigation pane, near the buttons of other horizontally oriented panels.

In either case, a gray frame highlights the entire panel buttons area. If you release the mouse button before the area is highlighted, the panel will float above the work area. If that happens, try again by dragging the panel tab into the upper or lower part of the button area.

View a different panel in the navigation pane

By default, only a selected set of panel buttons appears on the left side of the work area. Other panels are included in the View menu and may open as floating panels rather than in the navigation pane. However, you can dock the panel in the navigation pane later.

❖ Do one of the following:

- On the left side of the navigation pane, select the button for the panel.
- Choose View > Navigation Panels > [*panel name*].

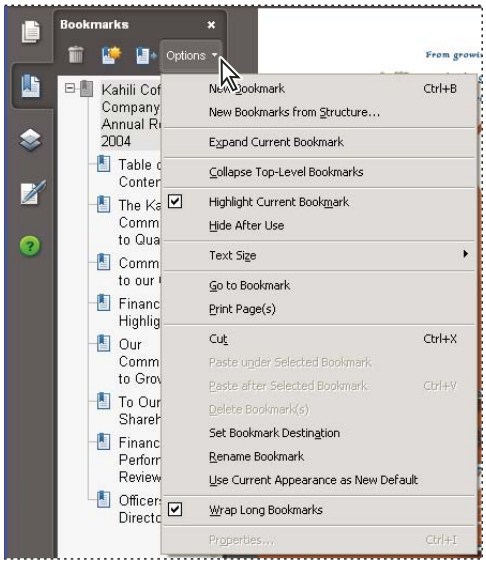
Dock or float navigation panels

- To float a panel that is docked in the navigation pane, drag the panel button into the document pane.
- To dock a floating panel, drag the tab to the navigation pane.
- To group two floating panels, drag the tab of one panel into the other floating panel.

Options in a navigation panel

All navigation panels have an Options menu in the upper-right corner. The commands available in these menu vary.

Some panels also contain other buttons that affect the items in the panel. Again, these vary among the different panels, and some panels have none.



Click Options to open the menu.

Viewing PDF pages

Open a PDF

You can open a PDF from within the Acrobat application, from the desktop, or from within certain other applications.

Open a PDF in the application

❖ Start Acrobat and do one of the following:

- Choose File > Open, or click the Open button in the toolbar. In the Open dialog box, select one or more filenames, and click Open. PDF documents usually have the extension .pdf.
- (Windows) Choose File > [*a previously opened PDF*].
- (Mac OS) Choose File > Open Recent File > [*a previously opened PDF*].
- From either the File > Organizer submenu or the Organizer button menu on the File toolbar, choose Collections > [*collection name*] > [*PDF filename*].
- From the File menu or the Organizer button menu on the File toolbar, choose History > [*time period*] > [*PDF filename*].

If more than one document is open, you can switch between documents by choosing the document name from the Window menu. In Windows, the application places a button for each open document on the Windows taskbar. You can click this button to move between open documents.

Open a PDF from the desktop or within another application

❖ Do one of the following:

- To open a PDF attached to an email message, open the message, either by double-clicking the PDF icon or right-clicking/Control-clicking and choosing Open.
- To open a PDF linked to an open web page, click the PDF file link. The PDF usually opens in the web browser.
- Double-click the PDF File icon in your file system.

Note: *In Mac OS, you may not be able to open a PDF created in Windows by double-clicking the icon. Instead, choose File > Open With > Acrobat.*

Opening pages in a PDF

Depending on the PDF you open, you may need to move forward through multiple pages, see different parts of the page, or change the magnification. There are many ways to navigate, but the following items are commonly used:

Note: *If you do not see these items, choose View > Toolbars > Reset Toolbars.*

Next and Previous The Next Page and Previous Page buttons appear on the Page Navigation toolbar. The text box next to them is also interactive, so you can type a page number and press Enter to go directly to that page.

Scroll bars Vertical and horizontal scroll bars appear to the right and bottom of the document pane whenever the view does not show the entire document. Click the arrows or drag to view other pages or different areas of the page.

Select & Zoom toolbar This toolbar contains buttons and controls for changing the page magnification.

Pages panel The Pages button on the left side of the work area opens the navigation pane to the Pages panel, which displays thumbnail images of each page. Click a page thumbnail to open that page in the document pane.

See also

"Retrace your viewing path" on page 29

"Adjust page magnification" on page 37

Page through a document

There are many ways to turn pages in a PDF. Many people use the buttons on the Page Navigation toolbar, but you can also use arrow keys, scroll bars, and other features to move forward and backward through a multipage PDF.

The Page Navigation toolbar opens by default. The default toolbar contains frequently used tools: the Next Page, Previous Page, and Page Number. Like all toolbars, the Page Navigation toolbar can be hidden and reopened by choosing it on the Toolbars menu under the View menu. You can display additional tools on the Page Navigation toolbar by right-clicking/Control-clicking the toolbar and choosing an individual tool, Show All Tools, or More Tools and then selecting and deselecting tools in the dialog box.

See also

"About bookmarks" on page 327

"About page thumbnails" on page 324

"Set the page layout and orientation" on page 40

Move through a PDF

❖ Do one of the following:

- Click the Previous Page or Next Page button on the toolbar.
- Choose View > Go To > [*location*].
- Choose View > Go To > Page, and then type the page number in the Go To Page dialog box.
- Press the Page Up and Page Down keys.

Jump to a specific page

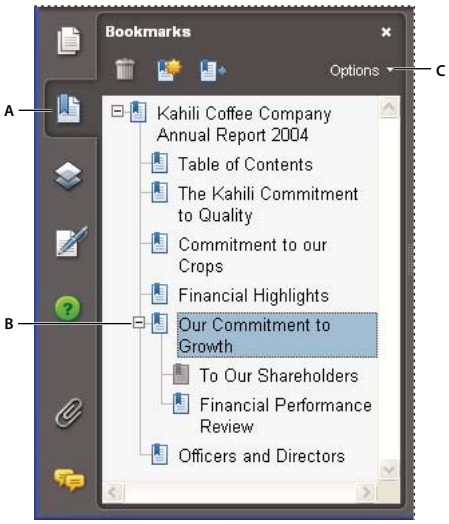
❖ Do one of the following:

- Drag the vertical scroll bar until the page appears in the small pop-up display.
- Type the page number to replace the one currently displayed in the Page Navigation toolbar, and press Enter or Return.

Note: *If the document page numbers are different from the actual page position in the PDF file, the page's position within the file appears in parentheses after the assigned page number in the Page Navigation toolbar. For example, if you assign numbering for a file that is an 18-page chapter to begin with page 223, the number shown when the first page is active is 223 (1 of 18). You can turn off logical page numbers in the Page Display preferences. See "Renumber pages" on page 138 and "Preferences for viewing PDFs" on page 33.*

Jump to bookmarked pages

Bookmarks provide a table of contents and usually represent the chapters and sections in a document. Bookmarks appear in the navigation pane.



Bookmarks panel
***A.** Bookmarks button **B.** Expanded bookmark **C.** Click to display bookmark Options menu.*

1 Click the Bookmarks button, or choose View > Navigation Panels > Bookmarks.

2 To jump to a topic, click the bookmark. Click the plus (+) or minus (-) sign to expand or collapse the bookmark contents.

***Note:** Depending on how the bookmark was defined, clicking it may not take you to that location but perform some other action instead.*

If the list of bookmarks disappears when you click a bookmark, click the Bookmarks button to display the list again. If you want to hide the Bookmarks button after you click a bookmark, select Hide After Use on the Options menu.

Use page thumbnails to jump to specific pages

Page thumbnails provide miniature previews of document pages. You can use thumbnails in the Pages panel to change the display of pages and to go to other pages. The red page-view box in the page thumbnail indicates which area of the page appears. You can resize this box to change the zoom percentage.

1 Click the Pages button or choose View > Navigation Panels > Pages to display the Pages panel.

2 To jump to another page, click its thumbnail.

View, sort, and search components in a PDF package

Both Adobe Reader users and Acrobat users can view, sort, and search component files in a PDF package.

***Note:** You can dramatically increase the speed of searches by creating an embedded index when you create a PDF package.*

See also

"Searching PDFs" on page 369

"Creating PDF indexes" on page 375

View component PDFs in a PDF package

The PDF package navigation bar contains buttons that control the visibility and placement of the list of component files. If the list is hidden, the View Top button or View Left button will make the list visible either horizontally or vertically adjacent to the document pane.

1 Open the PDF package in Acrobat.

2 In the PDF package navigation bar, select the View Left or View Top button, as needed, so that you can see the list of component PDFs.

3 Select the PDF you want to read. Or, use the Open Next and Open Previous buttons to review the component PDFs one by one.

Sort the components of a PDF package

Because the data categories are shown in columns in View Top mode, use that view to complete this procedure.

1 In the PDF package navigation bar, select the View Top button, if necessary, so that you can see the list of component PDFs and the categories bar across the top of the list.

2 Do any of the following:

- Click a category name. Click it a second time to reverse the order between Ascending and Descending.
- In the PDF package navigation bar, choose Options > Sort By > [*category name*].
- Right-click/Control-click a PDF in the list or anywhere in the categories bar and choose Sort By > [*category name*].
- Right-click/Control-click a PDF in the list or anywhere in the categories bar and choose Package Properties. Then choose options in the Sort By and Sort Order menus. (This sets the default sorting for the PDF package.)

Note: *Unless you change the default sorting for the PDF package, the sorting remains in place for only the current session or until you change the sorting again. The next time you open the PDF package, it will appear in the default sorting order.*

Search component PDFs in a PDF package

1 Choose Edit > Search, or choose Open Full Acrobat Search on the Find toolbar pop-up menu.

2 Select which PDFs to search. You can search only the currently open document, several documents that you select, or all the PDFs in the package.

3 Enter the search text and select other options for searching, as usual.

Automatically scroll through a document

Automatic scrolling advances your view of the PDF at a steady rate, moving vertically down the document. If you interrupt the process by using the scroll bars to move back or forward to another page or position, automatic scrolling continues from that point forward. At the end of the PDF, automatic scrolling stops and does not begin again until you choose automatic scrolling again.

1 Choose View > Automatically Scroll.

2 Press Esc to stop scrolling.

Retrace your viewing path

You can find PDF pages that you viewed earlier by retracing your viewing path. It's helpful to understand the difference between previous and next pages and previous and next views. In the case of pages, previous and next refer to the two adjacent pages, before and after the currently active page. In the case of views, previous and next refer to your viewing history. For example, if you jump forward and backward in a document, your viewing history retraces those steps, showing you the pages you viewed in the reverse order that you viewed them.

Retrace your path in a PDF

1 Choose View > Go To > Previous View.

2 To continue seeing another part of your path, do either of the following:

- Repeat step 1.
- Choose View > Go To > Next View.

Note: *You can make the Previous View button and Go To Next View button available in the toolbar area by right-clicking/Control-clicking the Page Navigation toolbar and choosing them on the context menu, or choosing Show All Tools.*

Retrace your path through multiple PDFs

❖ Choose View > Go To > Previous Document or Next Document. These commands open the other PDF documents if the documents are closed.

Note: *If Acrobat is open in a web browser, you can use the web browser's Back and Forward options as usual to retrace your steps.*

Change the PDF/A viewing mode

PDF/A is an ISO standard for PDFs. Documents you scan to PDF are PDF/A-compliant. You can specify when and whether you want to view documents in this viewing mode.

1 Choose Edit > Preferences (Windows) or Acrobat> Preferences (Mac OS).

2 Select Documents under Categories.

3 Choose an option for View Documents In PDF/A: Never, Always, or Only For PDF/A Documents.

You can switch in or out of PDF/A viewing mode by changing this preference setting again.

Navigate with links

Links can take you to another location in the current document, to other PDF documents, or to websites. Clicking a link can also open file attachments and play 3D content, movies, and sound clips. To play these media clips, you must have the appropriate hardware and software installed.

The person who created the PDF document determines what links look like in the PDF.

Note: *Unless a link was created in Acrobat using the Link tool, you must have the Automatically Detect URLs From Text option selected in the General preferences for a link to work correctly.*

1 Choose the Select tool .

2 Position the pointer over the linked area on the page until the pointer changes to the hand with a pointing finger. A plus sign (+) or a *w* appears within the hand if the link points to the web. Then click the link.

See also

"Links and attachments" on page 331

"Multimedia preferences" on page 381

PDFs with file attachments

If you open a PDF that has one or more attached files, the Attachments panel automatically opens, listing the attached files. You can open these files for viewing, edit the attachments, and save your changes, as permitted by the document authors.

If you move the PDF to a new location, the attachments automatically move with it.

See also

"Open, save, or delete an attachment" on page 335

Open or close reading mode

The reading mode view hides everything in the work area except the document and the menu bar.

❖ Choose View > Reading Mode.

Choosing Reading Mode again restores the work area to its previous view, with the same navigation buttons and toolbar displays.

View PDFs in Full Screen mode

In Full Screen mode, PDF pages fill the entire screen; the menu bar, toolbars, and window controls are hidden. A PDF creator can set a PDF to open in Full Screen mode, or you can set the view yourself. Full Screen mode is often used for presentations, sometimes with automatic page advancement and transitions.

The pointer remains active in Full Screen mode so that you can click links and open notes. There are two ways to advance through a PDF in Full Screen mode: You can use keyboard shortcuts for navigational and magnification commands, and you can set a Full Screen preference to display Full Screen navigation buttons that you click to change pages or exit Full Screen mode.

See also

"Preferences for viewing PDFs" on page 33

"Setting up a presentation" on page 353

Set the Full Screen navigation bar preference

1 Choose Edit > Preferences.

2 Under Categories, select Full Screen.

3 Select Show Navigation Bar.

4 Select View > Full Screen Mode.

The Full Screen navigation bar contains Previous Page, Next Page, and Close Full Screen View buttons, which appear in the lower left corner of the work area.

Read a document in Full Screen mode

If the Full Screen navigation bar is not shown, you can use keyboard shortcuts to navigate through a PDF.

Note: *If you have two monitors installed, the Full Screen mode of a page may appear on only one of the monitors. To page through the document, click the screen displaying the page in Full Screen mode.*

1 Choose View > Full Screen Mode.

2 Do any of the following:

- To go to the next page, press the Enter, Page Down, or Right Arrow key.
- To go to the previous page, press Shift+Enter, Page Up, or the Left Arrow key.
- To change the magnification, press Ctrl+0/Command+0 for Fit Page view, Ctrl+1/Command+1 for actual size, Ctrl+2/Command+2 for Fit Width view, or Ctrl+3/Command+3 for Fit Visible view.

You can show a Full Screen tool on the Page Display toolbar by right-clicking/Control-clicking the Page Display toolbar and choosing Full Screen Mode. Then, you can click the Full Screen tool to switch to Full Screen mode.

Close Full Screen mode

❖ Do one of the following:

- Press Ctrl+L/Command+L.
- Press Esc. (Escape Key Exits must be selected in the Full Screen preferences. This is the default setting.)

Viewing PDFs in a web browser

You can view PDFs in a supported web browser, or you can set your Acrobat Internet preferences to open linked or downloaded PDF files in a separate Acrobat window. If you open PDFs in Acrobat outside the browser, you cannot use Fast Web Viewing, form submittal in a browser, or search highlighting on the web.

Because keyboard commands may be mapped to the web browser, some Acrobat shortcuts may not be available. Similarly, you may need to use the tools and commands in the Acrobat toolbar rather than the browser toolbar or menu bar. For example, to print a PDF document, use the Print button in the Acrobat toolbar rather than the Print command in the browser. (In Microsoft Internet Explorer, you can choose File > Print, Edit > Copy, and Edit > Find on the Internet Explorer toolbar.)

Important: *(Mac OS) If you have Adobe Reader installed on your system and subsequently install Acrobat, Safari continues to use Adobe Reader to open PDFs in your browser. To reconfigure Safari to use Acrobat, you must quit Safari and all versions of Acrobat or Adobe Reader, start Acrobat, and then start Safari while Acrobat is running.*

Internet preferences

To open the Internet preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Internet under Categories.

Display PDF In Browser Displays any PDF opened from the web in the browser window. If this option is not selected, PDFs open in a separate Acrobat window. On Mac OS, if you have installed versions of Adobe Reader and Acrobat, you can select which application and which version to use.

Allow Fast Web View Downloads PDFs for viewing on the web one page at a time. If this option is not selected, the entire PDF downloads before it is displayed. If you want the entire PDF to continue downloading in the background while you view the first page of requested information, also select Allow Speculative Downloading In The Background.

Allow Speculative Downloading In The Background Allows a PDF to continue downloading from the web, even after the first requested page appears. Downloading in the background stops when any other task, such as paging through the document, is initiated in Acrobat.

Connection Speed Choose a connection speed from the menu. This setting is also used by the multimedia plug-in.

Internet Settings [or Network Settings] Click to open the Internet or network connection dialog box or panel for your computer. For more information, consult your operating system Help, your Internet service provider, or your local network administrator.

Read articles

In PDFs, *articles* are optional electronic threads that the PDF author may define within that PDF. Articles lead readers through the PDF content, jumping over pages or areas of the page that are not included in the article, in the same way that you might skim through a traditional newspaper or magazine, following one specific story and ignoring the rest. When you read an article, the page view may zoom in or out so that the current part of the article fills the screen.

See also

"Articles" on page 340

Open and navigate an article thread

1 Choose Tools > Select & Zoom > Hand Tool, or click the Hand Tool on the Select & Zoom toolbar.

2 Choose View > Navigation Panels > Articles to open the Articles panel.

Note: *You cannot open the Articles panel if you are viewing the PDF inside a browser. You must open the PDF in Acrobat.*

3 Double-click the article icon to go to the beginning of that article. The icon changes to the follow-article pointer .

Note: *If the Articles panel is blank, then the author has not defined any article threads for this PDF.*

4 With the article thread open, do any of the following:

- To scroll through the article one pane at a time, press Enter/Return or click in the article.
- To scroll backward through the article one pane at a time, Shift-click in the article, or press Shift+Return.
- To go to the beginning of the article, Ctrl-click/Option-click within the article.

5 At the end of the article, click in the article again.

The previous page view is restored, and the pointer changes to the end-article pointer .

Exit a thread before the end of the article

1 Make sure that the Hand tool is selected.

2 Shift+Ctrl-click/Shift+Option-click the page or press Enter/Return.

The previous page view is restored.

Preferences for viewing PDFs

The Preferences dialog box defines a default page layout and customizes your application in many other ways. To modify preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select the panel you want under Categories. For viewing PDFs, examine the preferences options for Documents, General, Multimedia, and Page Display.

The preferences settings control how the application behaves whenever you use it; they are not associated with any particular PDF document.

Note: *If you install any third-party plug-ins, set these preferences using the Third-Party Preferences menu item.*

See also

"3D preferences" on page 399

"Multimedia preferences" on page 381

"Setting accessibility preferences" on page 293

Documents preferences

Open Settings

Show Each Document In Its Own Window Creates multiple Acrobat windows rather than opening multiple PDFs in one instance of Acrobat.

Restore Last View Settings When Reopening Documents Determines whether documents open automatically to the last viewed page within a work session.

Open Cross-document Links In Same Window Closes the current document and opens the document being linked to in the same window, minimizing the number of windows open. If the document being linked to is already open in another window, the current document is not closed when you click a link to the open document. If you do not select this option, a new window opens each time you click a link to a different document.

Allow Layer State To Be Set By User Information Allows the author of a layered PDF document to specify layer visibility based on user information.

Allow Documents To Hide The Menu Bar, Toolbars, And Window Controls Allows the PDF to determine whether the menu bar, toolbar, and window controls are hidden when the PDF is opened.

Documents In Recently Used List Sets the maximum number of documents listed in the File menu (Windows) or when you choose File > Open Recent File (Mac OS). The default is five for Windows and nine for Mac OS.

Remember Files In Organizer History For Specifies how long PDF files remain in the History list.

Save Settings

Automatically Save Document Changes To Temporary File Every _ Minutes Determines how often Acrobat automatically saves changes to an open document.

Save As Optimizes For Fast Web View Restructures a PDF document for page-at-a-time downloading from web servers.

PDF/A View Mode

View Documents In PDF/A Mode Specifies when to use this viewing mode: Always, Never, or Only For PDF/A Documents.

Examine Document

Examine Document Examines the PDF for items that may not be apparent, such as metadata, file attachments, comments, and hidden text and layers. The examination results appear in a dialog box, and you can remove any type of item that appears there.

- **Examine Document When Closing Document** (Not selected by default.)
- **Examine Document When Sending Document By Email** (Not selected by default.)

Adobe Version Cue CS3

Enable Version Cue File-Version Manager Turns on Adobe Version Cue® CS3 (a feature of Adobe Creative Suite 3) and adds the Save A Version command and the Versions command to the File menu.

Note: *To use Version Cue in Acrobat, you must be able to access a Version Cue Workspace in Creative Suite.*

Full Screen preferences

Full Screen Setup

Current Document Only Specifies whether or not the display is limited to a single PDF.

Fill Screen With One Page At A Time Sets the page view to the maximum screen coverage by a single page.

Alert When Document Requests Full Screen Displays a message before going into Full Screen mode. Selecting this option overrides a previous selection of Do Not Show This Message Again in that message.

Which Monitor To Use Specifies the monitor on which full-screen display appears (for users with multiple-monitor configurations).

Full Screen Navigation

Escape Key Exits Lets you exit Full Screen mode by pressing the Esc key. If this option is not selected, you can exit by pressing Ctrl+L/Command+L.

Show Navigation Bar Shows a minimal navigation toolbar regardless of the document settings.

Left Click To Go Forward One Page; Right Click To Go Back One Page Lets you page through an Adobe PDF document by clicking the mouse. You can also page through a document by pressing Return, Shift-Return (to go backward), or the arrow keys.

Loop After Last Page Lets you page through a PDF document continuously, returning to the first page after the last. This option is typically used for setting up kiosk displays.

Advance Every _ Seconds Specifies whether to advance automatically from page to page every set number of seconds. You can page through a document using mouse or keyboard commands even if automatic paging is selected.

Full Screen Appearance

Background Color Specifies the window's background color in Full Screen mode. You can select a color from the color palettet to customize the background color.

Mouse Cursor Specifies whether to show or hide the pointer when Full Screen mode is in operation.

Full Screen Transitions

Ignore All Transitions Removes transition effects from presentations that you view in Full Screen mode.

Default Transition Specifies the transition effect to display when you switch pages in Full Screen mode and no transition effect has been set for the document.

Direction Determines the flow of the selected default transition on the screen, such as Down, Left, Horizontally, and so forth. The available options vary according to the transition. If no directional options affect the selected default transition, this option is not available.

Navigation Controls Direction Mimics the user's progress through the presentation, such as transitioning from top to bottom when the user proceeds to the next page and from bottom to top when the user backtracks to the previous page. Available only for transitions with directional options.

General preferences

Basic Tools

Use Single Key Accelerators To Access Tools Enables you to select tools with a single keystroke. This is off by default.

Create Links From URLs Specifies whether links that weren't created with Acrobat are automatically identified in the PDF document and become clickable links.

Make The Hand Tool Select Text Enables the Hand tool to function as the Select tool when it hovers over text in an Adobe PDF.

Make The Hand Tool Read Articles Changes the appearance of the Hand tool pointer when over an article thread. Upon the first click, the article zooms to fill the document pane horizontally; subsequent clicks follow the thread of the article.

Make The Hand Tool Use Mouse-wheel Zooming Changes the action of the mouse wheel from scrolling to zooming.

Make The Select Tool Select Images Before Text Changes the order in which the Select tool selects.

Use Fixed Resolution For Snapshot Tool Images Sets the resolution used to copy an image captured with the Snapshot tool.

Warnings

Do Not Show Edit Warnings Disables warning boxes that would normally appear when you delete items such as links, pages, page thumbnails, and bookmarks.

Reset All Warnings Restores default settings for warnings.

Print

Show Page Thumbnails In Print Dialog Controls the print preview display in the Print dialog box. Deselecting this option speeds up the preview.

Emit Passthrough PostScript When Printing Enables Adobe PostScript® XObjects in the PDF file to be emitted when that PDF file is printed to a PostScript printer.

Application Startup

Show Splash Screen Determines whether the application splash screen appears each time the application starts.

Use Only Certified Plug-Ins Ensures that only Adobe-certified third-party plug-ins are loaded.

Page Display preferences

Default Layout And Zoom

Resolution

Use System Setting Uses the system settings for monitor resolution.

Custom Resolution Sets the monitor resolution.

Rendering

Smooth Text Specifies the kind of text-smoothing to apply: None, For Monitor, or For Laptop/LCD.

Smooth Line Art Applies smoothing to remove abrupt angles in lines.

Smooth Images Applies smoothing to minimize abrupt changes in images.

Use Local Fonts Specifies whether the application uses or ignores local fonts installed on your system. When deselected, substitute fonts are used for any font not embedded in the PDF. If a font cannot be substituted, the text appears as bullets and an error message appears.

Use 2D GPU Acceleration (Appears only if your computer hardware supports 2D GPU acceleration.) Speeds up zooming, scrolling, and redrawing of page content, and speeds the rendering and manipulation of 2D PDF content. This option is deselected by default.

Note: *If the 2D GPU Acceleration option appears on the Page Display preferences but is not available, you may need to update your GPU card driver to enable this hardware feature. Contact your card vendor or computer manufacturer for an updated driver.*

Use Page Cache Places the next page in a buffer before the current page is viewed to reduce the time required to page through a document.

Page Content And Information

Show Large Images Displays large images. If your system is slow to display image-intensive pages, you can deselect this option.

Overprint Preview Turns overprint preview on or off. The Overprint Preview mode lets you see (on-screen) the effects of ink aliasing in the printed output. A printer or service provider may create an ink alias if a document contains two similar spot colors and only one is required, for example.

Show Art, Trim, & Bleed Boxes Displays any art, trim, or bleed boxes defined for a document.

Show Transparency Grid Displays the grid behind transparent objects.

Use Logical Page Numbers Enables the Number Pages command for matching the position of the page in the PDF to the number printed on the page. A page number, followed by the page position in parentheses, appears in the Page Navigation toolbar and in the Go To Page and Print dialog boxes—for example, i (1 of 1) if the printed number of the first page is i. If this option is not selected, pages are numbered with arabic numbers starting at 1. Selecting this option helps prevent unexpected behavior when clicking Back or Go Back in your web browser.

Always Show Document Page Size Displays the page measurements beside the horizontal scroll bar.

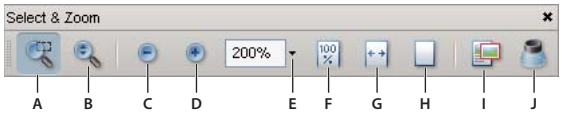
Use Smooth Zooming When deselected, turns off animation effects, which improves performance.

Use Smooth Scrolling When deselected, turns off animation effects, which improves performance.

Adjusting PDF views

Adjust page magnification

Tools on the Select & Zoom toolbar can change the magnification of PDF documents. Only some of these tools appear on the default view of the toolbar. You can see all the tools by right-clicking/Control-clicking the Select & Zoom toolbar and choosing either individual tools, Show All Tools, or More Tools and then selecting individual tools.



All zoom tools
A. *Marquee Zoom tool* ***B.*** *Dynamic Zoom tool* ***C.*** *Zoom Out button* ***D.*** *Zoom In button* ***E.*** *Zoom Value menu button* ***F.*** *Actual Size button* ***G.*** *Fit Width button* ***H.*** *Fit Page button* ***I.*** *Pan & Zoom Window tool* ***J.*** *Loupe tool*

- The Marquee Zoom tool works in a few different ways. You can use it to drag a rectangle around a portion of the page that you want to fill the viewing area. Or, simply clicking the Marquee Zoom tool increases the magnification by one preset level, centering on the point where you clicked. To decrease the magnification by one preset level, Ctrl-click/Option-click the Marquee Zoom tool.
- The Dynamic Zoom tool zooms in when you drag it up the page and it zooms out when you drag down. If you use a mouse wheel, this tool zooms in when you roll forward and zooms out when you roll backward.
- Zoom In and Zoom Out buttons change the document magnification by preset levels.
- The Zoom Value option changes the page view according to a percentage you type in or select from a pop-up menu.
- Actual Size displays the page at 100% magnification.
- Fit Width adjusts the magnification so that the PDF fills the document pane horizontally.
- Fit Page adjusts the magnification so that one page fills the document pane vertically.
- The Pan & Zoom Window tool adjusts the magnification and position of the view area to match the area in an adjustable rectangle in the Pan & Zoom window's thumbnail view of the page.
- The Loupe Tool window displays a magnified portion of the PDF that matches the area in an adjustable rectangle on the document pane.

Resize a page to fit the window

- To resize the page to fit entirely in the document pane, choose View > Zoom > Fit Page.
- To resize the page to fit the width of the window, choose View > Zoom > Fit Width. Part of the page may be out of view.
- To resize the page to fit the height of the window, choose View > Zoom > Fit Height. Part of the page may be out of view.
- To resize the page so that its text and images fit the width of the window, choose View > Zoom > Fit Visible. Part of the page may be out of view.

To see keyboard shortcuts for resizing the document, open the View menu.

Show a page at actual size

❖ Choose View > Zoom > Actual Size.

The actual size for a PDF page is typically 100%, but the document may have been set to another magnification level when it was created.

Change the magnification with zoom tools

❖ Do one of the following:

- Click the Zoom In button or the Zoom Out button in the toolbar.
- Enter a magnification percentage in the Select & Zoom toolbar, either by typing or choosing from the pop-up menu.
- Drag the Marquee Zoom tool to define the area of the page that you want to fill the document pane.
- Drag the Dynamic Zoom tool up to increase the magnification and down to decrease magnification.

When the Marquee Zoom tool is selected, you can Ctrl-click/Option-click or Ctrl-drag/Option-drag to zoom out. Holding down Shift switches temporarily from the Marquee Zoom tool to the Dynamic Zoom tool.

Change the magnification with the Pan & Zoom Window tool

1 Choose Tools > Select & Zoom > Pan & Zoom Window, or select the Pan & Zoom Window tool on the Select & Zoom toolbar.

2 Do any of the following:

- Drag the handles of the box in the Pan & Zoom window to change the document magnification.
- Drag the center of the box to pan across the area you want to see.
- Click the navigation buttons to move to a different page.
- Enter a value in the zoom text box, or click the plus or minus buttons to increase or decrease the magnification by preset levels.

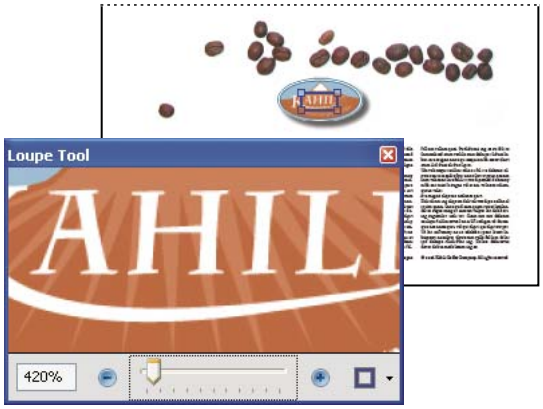
Change the magnification with the Loupe tool

1 Choose Tools > Select & Zoom> Loupe, or select the Loupe tool on the Select & Zoom toolbar, if it is displayed.

2 Click the area of the document you want to view in closer detail. A rectangle appears in the document, corresponding to the area shown in the Loupe Tool window. You can drag or resize the rectangle to change the Loupe tool view.

3 To change the magnification of the Loupe tool, do any of the following:

- Drag the slider.
- Click the plus or minus buttons.
- Enter a value in the zoom text box.



Use the Loupe tool to view a magnified area of the document.

Note: *You can change the color of the Loupe tool rectangle, click the Line Color pop-up menu in the lower right corner of the Loupe Tool window, and select a new color.*

Change the magnification by using a page thumbnail

1 Click the Pages button on the left side of the window to view the page thumbnails.

2 Locate the thumbnail for the current page, and then position the pointer over the lower right corner of the page-view box until the pointer changes into a double-headed arrow.

3 Drag the corner of the box to reduce or expand the view of the page.

4 As needed, move the pointer over the zoom box frame within the thumbnail until it changes to a Hand icon, and then drag the frame to see a different area of the page in the document pane.



A page-view box in a page thumbnail indicates the area of the page currently showing in the document pane.

Change the default magnification

1 Choose Edit > Preferences.

2 Under Categories, select Page Display.

3 Open the Zoom pop-up menu and choose a default magnification level.

Set the page layout and orientation

Changing the page layout is especially useful when you want to zoom out to get an overview of the document layout. You can use the following page layouts when viewing PDF documents:

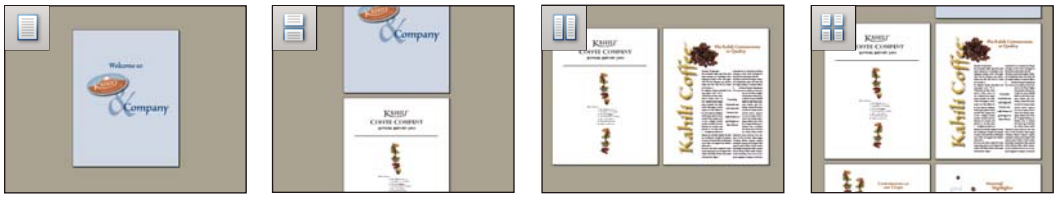
Single Page Displays one page at a time, with no portion on other pages visible.

Single Page Continuous Displays pages in a continuous vertical column that is one page wide.

Two-Up Displays each two-page spread with no portion of other pages visible.

Two-Up Continuous Displays facing pages side by side in a continuous vertical column.

Note: *If a document has more than two pages, the Two-Up and Two-Up Continuous views display the first page alone on the right side of the document pane, to ensure proper display of two-page spreads.*



Single Page, Single Page Continuous, Two-Up, Two-Up Continuous page layouts

Set page layout

- To see only one page at a time, choose View > Page Display > Single Page.
- To see two pages at a time, side by side, choose View > Page Display > Two-Up.
- To scroll down continuously through one page after another, choose View > Page Display > Single Page Continuous.
- To scroll down continuously through two pages at a time, choose View > Page Display > Two-Up Continuous.

You can also display buttons for each of these options in the Display Pages toolbar by choosing Tools > Toolbars > More Tools, and selecting them in the More Tools dialog box.

Note: *In Single Page layout, choosing Edit > Select All selects all text on the current page. In other layouts, Select All selects all text in the PDF.*

Rotate the page view

You can change the view of a page in 90˚ increments. This changes the view of the page, not its actual orientation. You can't save this change.

❖ Choose View > Rotate View > Clockwise or Counterclockwise, or click the Rotate Clockwise button or the Rotate Counterclockwise button in the toolbar.

Note: *If you want the rotation to be saved with the document, choose Document > Rotate Pages.*

Change the default page layout

1. Choose Edit > Preferences.
2. Under Categories, select Page Display.
3. Open the Page Layout menu and choose Automatic, Continuous, Single Page, Two-Up, or Two-Up Continuous.

Use split-window view

You can view a PDF with the document pane divided into two panes (Split command) or four panes (Spreadsheet Split command).

With Split view, you can scroll, change the magnification level, or turn to a different page in the active pane without affecting the other pane.

The Spreadsheet Split view is useful if you want to keep column headings and row labels visible while scrolling through a large spreadsheet or table. In this mode, changing the magnification in one pane changes the magnification in all panes. Also, scrolling is coordinated between the panes: scrolling a pane horizontally also scrolls the pane above or below it; scrolling vertically also scrolls the pane to the left or right of that pane.

1 Start creating the type of split view you want:

- To split the view into two panes, choose Window > Split, or drag the gray box above the vertical scroll bar.
- To split the view into four panes with synchronized scrolling and zoom levels, choose Window > Spreadsheet Split.

2 Drag the splitter bars up, down, left, or right to resize the panes, as needed.

3 Adjust the zoom level, as needed:

- In Split view, click a pane to make it active, and change the zoom level for that pane only.
- In Spreadsheet Split view, adjust the zoom level to change the displays in all four panes.

4 Scroll, as needed:

- In Split view, click a pane to make it active, and scroll to change that pane only.
- In Spreadsheet Split view, click a pane, and scroll vertically to change the views in the active pane and the pane beside it. Scroll horizontally to change the views in the active pane and the pane above or below it.

5 To restore single-pane view, choose Window > Remove Split.

View a document in multiple windows

You can create multiple windows for the same document using the New Window command. New windows have the same size, magnification, and layout as the original window and open at the same page and on top of the original window. When you open a new window, Acrobat adds the suffix 1 to the original filename and assigns the suffix 2 to the new window. You can open multiple windows with the suffix incrementing with each new window. Closing a window causes the remaining open windows to be renumbered sequentially; that is, if you have five windows open and you close the third window that you opened, the windows are renumbered with the suffixes 1 to 4.

Note: *This feature is not available when PDFs are viewed in a browser.*

Open a new window

❖ Select Window > New Window.

Close a window

❖ Click the close box in the window. You are prompted to save any changes. Closing a window does not close a document if more than one window is open.

Close all windows for a document

❖ Choose File > Close. You are prompted to save any changes before each window is closed.

Display off-screen areas of a magnified page

When you zoom in to a high magnification, you may be able to see only part of a page. You can shift the view to show other areas of the page without changing the magnification level.

❖ Do either of the following:

- Use the vertical scroll bars to move up and down the pages or the horizontal scroll bars to move across the page.
- Select the Hand tool in the Select & Zoom toolbar, or choose Tools > Select & Zoom > Hand Tool, and drag to move the page, as if moving a piece of paper on a table.

See also

"About PDF layers" on page 360

Display PDFs in Line Weights view

The Line Weights view applies a constant stroke width (1 pixel) to lines, regardless of zoom. When you print the document, the stroke will print at the true width. Line Weights view is off by default.

❖ Choose View > Line Weights. To turn off Line Weights view, choose View > Line Weights again.

Note: *Line Weights view is not available for viewing PDFs within a web browser.*

Grids, guides, and measurements

About grids, rulers, and measurement tools

Acrobat includes a set of tools that helps you fine-tune the layout of your Adobe PDF documents. Tools such as grids, rulers, guides, measurement tools, and the Info panel are especially useful when you're designing forms, inspecting CAD (computer-aided design) drawings, and preparing for professional printing.

View grids

You can use grids to accurately line up text and objects in a document. When turned on, the grid is visible over the document. The Snap To Grid option aligns an object with the nearest grid line when you move the object.

View or hide the grid

❖ Choose View > Grid. A check mark appears next to the command name when the grid is displayed.

Turn the Snap To Grid option on or off

❖ Choose View > Snap To Grid. A check mark appears next to the command name when the option is turned on.

Change the grid appearance

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select Units & Guides under Categories.

2 To change grid settings, do any of the following:

- To change the spacing between grid lines, use the arrow keys or the text box to enter a value for Width Between Lines and Height Between Lines.

- To change the origin of the grid, use the arrow keys or the text box to enter a value for Grid Offset From Left Edge and Grid Offset From Top Edge.
- To change the number of subdivisions within each grid square, use the arrow keys or the text box to enter a value for Subdivisions. Subdivision lines are lighter than grid lines.
- To change the color of the grid lines, click the Grid Line Color square and choose a new color from the Color panel. Then click OK.

3 Click OK to close the Preferences dialog box.

Create ruler guides

Horizontal and vertical rulers let you check the size of objects in your documents. You can also create guides in your document, which are especially useful for lining up objects, such as form fields. You can change the unit of measurement and color used in the ruler.

Create new ruler guides

1 Choose View > Rulers.

2 Do one of the following:

- Drag down from the horizontal ruler to create a horizontal guide, or drag to the right of the vertical ruler to create a vertical guide.
- Double-click a location on the horizontal ruler to create a vertical guide, or double-click a location on the vertical ruler to create a horizontal guide.

Show or hide guides

❖ Choose View > Guides.

Move or delete ruler guides

❖ Click the guide to select it, and then drag it to a new location, or press Delete. To delete all guides, right-click/Control-click in the ruler area and choose Clear All Guides or Clear Guides On Page.

Change guide colors

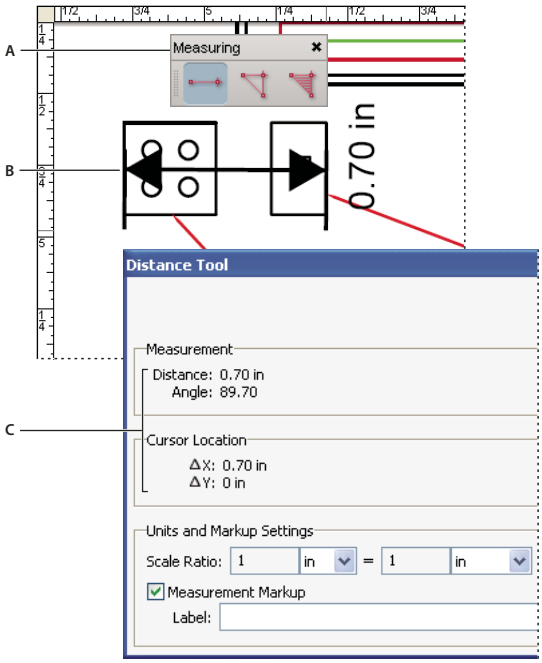
1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select Units & Guides under Categories.

2 Click the Guide Color square and choose a new color from the Color pop-up menu, and then click OK.

Measure the height, width, or area of objects

The Measuring toolbar contains tools you can use to measure distances and areas of objects in PDF documents. The measuring tools are especially useful when you need to know the distances or areas associated with objects in a form or computer-aided design (CAD) drawing, or when you want to measure certain areas of a document before sending it to a professional printer. The measuring tools are available to Reader users only if the PDF creator enables measuring functionality.

When you use a measuring tool, the tool dialog box displays the measurements of the line segments you draw.



Measuring tools
***A.** Measuring toolbar **B.** Object being measured **C.** Tool display*

1 Choose Tools > Measuring, and select a measuring tool. Or, right-click/Control-click the toolbar area, and then choose Measuring.

2 To measure areas of your PDF document, do any of the following:

- Select the Distance tool to measure the distance between two points. Click the first point, move the pointer to the second point, and then click again. The measurements appear in the tool dialog box.
- Select the Perimeter tool to measure a set of distances between multiple points. Click each point you want to measure. Then, double-click the last point, or hold the pointer over the last point and click.
- Select the Area tool to measure the area within the line segments that you draw. Click each point you want to measure. After you have clicked at least two points, click the first point to complete the area measurement.

***Note:** You can also finish a measurement by right-clicking/Control-clicking and choosing Complete Measurement from the context menu.*

3 While measuring objects, do any of the following:

- To change the scaling ratio (such as 3:2) on the drawing areas, specify the appropriate numbers in the tool dialog box. If desired, change the unit of measurement next to this ratio.
- Select Measurement Markup in the tool dialog box if you want the lines you draw to appear as a comment. You can then use the Hand tool to double-click the comment and view the measurement for the line segments that you draw. Unless Annotate is selected, the object you draw will disappear when you measure another object or select another tool.

View the Info panel

The Info panel lets you see the coordinate position of the pointer within the document pane. The position numbering begins at the upper left corner of the document. The Info panel also shows the width and height of a selected object as you resize it.

View x and y coordinates

1 Choose View > Navigation Panels > Info.

2 Move the mouse pointer to view x and y coordinates.

Change the panel's measurement units

❖ In the Options menu in the Info panel, choose a different unit of measurement. The currently selected option has a check mark next to its name.

Saving PDFs

About saving PDFs

You can save a copy of a PDF with any comments, entries in form fields, or digital signatures that you have added to the PDF. If the PDF restricts your usage rights, the document message bar under the toolbar area describes these restrictions when you open the document.

You can also save the contents of a PDF in text format. This allows you to easily reuse the text from a PDF and to use the content with a screen reader, screen magnifier, or other assistive technology.

Save a copy of a PDF

1 Choose File > Save As (or Save A Copy, if Save As is not shown).

2 In the Save As dialog box, enter the filename and location, and click Save.

Save comments, form field entries, and digital signatures

❖ Do one of the following:

- Choose File > Save to save changes to the current file.
- Choose File > Save As to save changes to a new file.



If you are viewing a PDF in a web browser, the Acrobat File menu is not available. However, you can use the Save A Copy button in the Acrobat toolbar to save the PDF.

See also

"Filling in PDF forms" on page 201

"Participating in a PDF review" on page 161

Save document changes

If you modify a PDF—such as by adding new pages from another file or deleting pages—you can save your changes by saving the PDF or by saving a copy of the PDF. You can also save changes to your work incrementally and then recover those changes if a problem occurs.

Note: *Saving a digitally signed PDF invalidates the signature.*

Save changes

- To save the changes to the current document, choose File > Save.
- To save the modified document to a new file, choose File > Save As. For Save As Type (Windows) or Format (Mac OS), choose Adobe PDF Files (*.pdf). Type a name and location, and click Save.

Recover the last saved version

❖ Choose File > Revert, and then click Revert.

About the Autosave feature

The Autosave feature guards against losing your work in case of a power failure by incrementally, and at regular intervals, saving file changes to a specified location. The original file is not modified. Instead, Acrobat creates an autosave file of changes, which includes all the changes you made to the open file since the last automatic save. The amount of new information that the autosave file contains depends on how frequently Acrobat saves the autosave file. If you set the autosave interval to 15 minutes, you could lose the last 14 minutes of your work if a problem occurs. Frequent automatic saving prevents loss of data, and is especially useful if you make extensive changes to a document, such as by adding comments.

You can apply autosave changes to the original files when you restart Acrobat. When you close, save manually, or revert to the last-saved version of a file, the autosave file is deleted.

Note: *If you use assistive technology, such as a screen reader, you may want to disable the Autosave feature so that you don't lose your place when the file is reloaded.*

The Autosave feature won't work in the following cases:

- A document that has its security changed. You must save the document to re-enable automatic saving of document changes.
- A document created using the WebCapture feature or extracted from a larger PDF (Document > Extract Pages). You must save the document to enable automatic saving of changes.
- A document displayed in a web browser or incorporated into a container document that supports Object Linking and Embedding (OLE). This document appears outside the default file system and cannot support automatic saving.

Recover lost changes

To prevent lost changes after an unexpected interruption, the Autosave feature must be enabled, which is the default setting.

Set up automatic saving

1. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).
2. Select Documents in the Categories list.

3 If Automatically Save Document Changes To Temporary File Every *xx* Minutes (1-99) is not selected, select it now.

4 In the Minutes box, specify how often you want Acrobat to save files.

Recover lost changes after an unexpected shutdown

1 Start Acrobat or open the file you were working on last.

2 When prompted, click Yes to open the autosave file or files. If multiple files were open, Acrobat opens all of the files for you.

3 Save the file or files with the same names as the files you were originally working on.

Reduce file size by saving

You can sometimes reduce the file size of a PDF simply by using the Save As command. Reducing the size of PDFs improves their performance—particularly when they're being accessed on the web—without altering their appearance.

The Reduce File Size command resamples and recompresses images, removes embedded fonts, compresses document structure, and cleans up elements such as invalid bookmarks. If the file size is already as small as possible, this command has no effect.

Note: *Reducing the file size of a digitally signed document removes the signature.*

1 Choose Document > Reduce File Size.

2 Select the version compatibility that you need, and click OK.

If you're certain that all your users use Acrobat 8 or Adobe Reader 8, limiting compatibility to the latest version can further reduce file size.

If you want to control changes and quality trade-offs, use PDF Optimizer, which makes more options available.

Note: *If you select Acrobat 4.0 And Later, and the document contains transparency, the transparency is flattened.*

See also

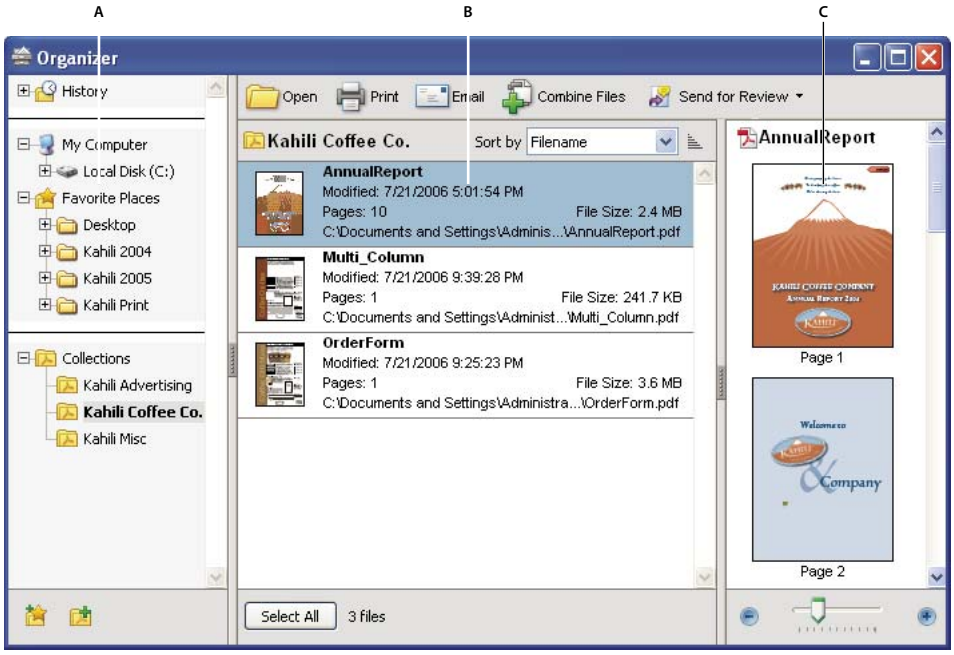
"PDF Optimizer" on page 343

Organizer

Organizer window overview

Organizer helps you find PDFs that you've previously opened and PDFs that you've organized into collections and favorites. With Organizer, you can see thumbnail images of PDF pages to quickly identify files. You can also use Organizer to organize related PDFs without changing their location in your file structure, and quickly browse, find, and sort PDFs that you recently viewed.

You access the Organizer and Organizer-related commands in the File menu. After you select one or more files within the Organizer, you can start one of several different tasks using the buttons above the file list.



Organizer window in Windows
***A.** Categories pane **B.** Files pane **C.** Pages pane*

Categories pane

The categories pane of the Organizer window is divided vertically into sections that contain categories. These items can help you locate and organize PDFs that reside on your computer, on a network, and on the web.

History Contains subcategories that list all the PDFs that you've opened during a specified period of time. You can't change the subcategory names or manually add PDFs to the History, which is automatically updated each time you open a PDF and as time passes, but you can clear the entire history by using the Clear History button in the files pane. You can also control the maximum length of the file history or turn it off with the Remember Files In Organizer History For option in Edit > Preferences > Documents.

My Computer (Windows) or *[disk name]* (Mac OS) Lists the hard drives and folders in their current hierarchy. This category is especially useful if you know where a particular PDF resides.

Favorite Places Lists any folders, network locations, and web directories that you've specified as favorite destinations. This category functions like bookmarks or favorite destinations that you create for quick access in a web browser, except that the destinations are folders or disk drives that contain PDFs. You can add or remove destinations from the Favorite Places list, but you can't edit the destination names.

Collections Contains collection folders that list all PDFs that you've associated with each particular collection folder. Each collection folder can point to multiple PDFs no matter where each PDF is located; for example, a single collection folder can list PDFs that are actually located in different folders on your computer, on a network, and also on the web. You can change each collection folder's name, add new collection folders, and add PDFs to each collection folder.

***Note:** Collections and PDF packages both involve multiple PDFs, but in very different ways. A PDF package is itself a PDF file that can be composed of multiple PDFs and that exists in a folder on your computer. For example, you can attach a PDF package to an email message. Collections are more like reminders that help you find related files that may be stored in different locations on your computer.*

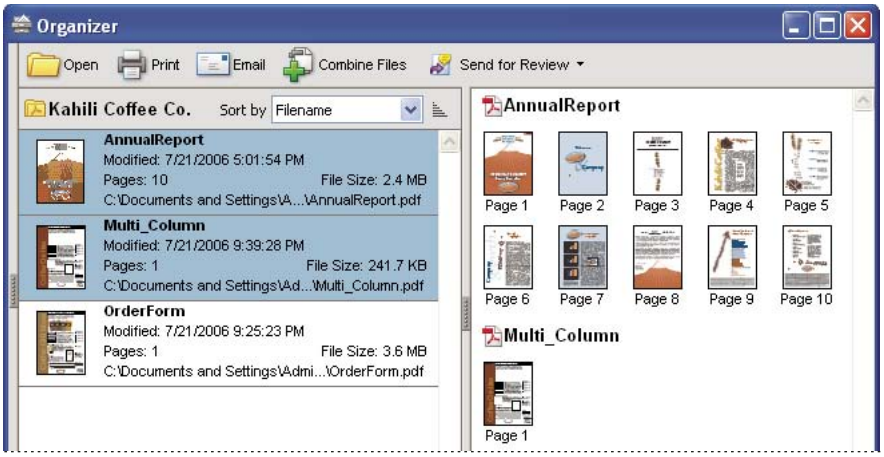
Files pane

The files pane in the Organizer window lists the PDFs that are within the subcategory or folder selected in the categories pane; each PDF listing shows the filename, modification date, page number, file size, location, and a thumbnail image of the first page. You can sort the list by filename, metadata information, number of pages, file size, modification date, and date last opened.

Use the buttons at the top of the Organizer window to open, print, email, or combine one or more selected PDFs; in addition, you can send a selected PDF for review or approval, or upload it for a browser-based review.

Pages pane

The pages pane of the Organizer window displays thumbnails for every page of all PDF files that are selected in the files pane. The Zoom slider and buttons at the bottom of the pages pane let you adjust the size of the page thumbnails.



Selecting a PDF (left) reveals a thumbnail for each page in the pages pane (right).

Adjust the Organizer window

You can make changes to your view of the Organizer.

See also

"Combining files into PDFs" on page 119

"Starting and managing a review" on page 157

Display the Organizer window

❖ Choose File > Organizer > Open Organizer.

It isn't necessary to open the Organizer window if you want to open a PDF in a collection, create a new collection, add an open PDF to a collection, or open a PDF from your history of opened PDFs. Choose File > Organizer or File > History to access commands that let you do all of these things.

Resize the Organizer and its panes

- To resize a pane relative to the other panes, drag the vertical bar that separates two panes.
- To resize the Organizer window, drag the left, right, or bottom edge of the window.

Sort the files pane list

1 If necessary, select a subcategory or folder in the categories pane to display PDFs in the files pane.

2 In the files pane, do any of the following:

- To sort the list of PDF files according to a particular property, choose a property from the Sort By menu.
- To change the sorting direction, click the Ascending Sort Order button or the Descending Sort Order button to the right of the Sort By menu.
- To view the location of the selected PDFs, right-click/Control-click, and choose Show In Windows Explorer (Windows) or Show In Finder (Mac OS).

Organize PDF collections

You can manage PDF collections in the Organizer window.

Add a PDF to a collection

❖ Do any of the following:

- Right-click/Control-click the collection, choose Add Files, select one or more PDFs, and click Add.
- Right-click/Control-click the PDF in the files pane, and choose Add To A Collection > *[collection name]*.
- Drag a PDF from Windows Explorer or Mac OS Finder to the collection in the categories pane.
- After selecting a subcategory in the History, My Computer, or Favorite Places category, drag a PDF from the files pane to the desired collection.
- In Acrobat, open the PDF and choose File > Organizer > Add To A Collection. Then either select the collection to which you want to add the PDF or click New Collection, type a name, and click Create.

You can open any PDF from a collection by using the Open button in the Organizer window or by choosing the PDF filename from a submenu directly in Acrobat. To open a PDF from a collection in Acrobat, choose Collections > [collection name] > [PDF filename] from either the File > Organizer submenu or the Organizer menu in the File toolbar.

Edit the collection folders

- To rename a collection, right-click/Control-click the collection name, choose Rename Collection, and then type the new name.
- To delete a collection, right-click/Control-click the collection name, choose Delete Collection, and then click Yes in the confirmation dialog box. The PDF files within the collection aren't deleted from their original locations.
- To create a new collection, click the Create A New Collection button in the Organizer window. Or, in Acrobat, choose File > Organizer > Create A New Collection. Type a name for the collection.

Move a PDF to a different collection

❖ To move a PDF from one collection to another, select the collection that contains the PDF, right-click/Control-click the PDF file in the files pane, and choose Move To Collection > *[collection name]*.

Remove a PDF from a collection

❖ To remove a PDF from a collection, select the collection, right-click/Control-click the PDF in the files pane, and choose Remove From *[collection name]*.

Organize PDFs with the Favorite Places category

1 To add an existing folder or hard drive to the category, do one of the following:

- Click the Add A Favorite Place button, select a folder or hard drive, and click OK.
- Right-click/Control-click the folder in the My Computer (Windows) or *[disk name]* (Mac OS) category, and choose Add *[folder name]* To Favorite Places.
- Right-click/Control-click the subfolder in the Favorite Places category, and choose Add *[favorite place name]* To Favorite Places.

2 To remove a folder or hard drive from the list of Favorite Places, right-click/Control-click the item, and choose Remove *[folder name]* From Favorite Places.

Expand views in the Categories pane

Items in the Categories pane can be expanded and collapsed by clicking the plus sign [+] (Windows) or arrow (Mac OS) so that you can see more of the structure. When you select a date category, folder, or collection, all PDFs in that item are listed in the pages pane.

Expand an Organizer category

1 To expand or collapse a category or folder in the categories pane, click the icon to the left of the category icon or folder icon.

2 Select a subcategory or folder under a main category. The pages pane lists all PDFs associated with that subcategory or folder.

Expand the file structure

❖ Select a folder in the My Computer (Windows) or *[disk name]* (Mac OS) category. All PDFs in that folder are listed in the files pane.

Start a task from the Organizer files pane

1 Select a subcategory or folder under a main category in the categories pane to display PDFs in the files pane.

2 Select the file or files you want to work with:

- To select a listed PDF file, click it.
- To select all the PDF files listed, click Select All.
- To add noncontiguous PDF files to or remove them from the selection, Ctrl-click/Command-click them.
- To add contiguous PDF files to the selection, Shift-click them.

3 To perform an action on the selected PDF files, click one of the task buttons at the top of the Organizer window:

- To open, print, or email the PDF files, use the buttons above the files pane.
- To start combining PDF files into a single PDF file, click the Combine Files button and follow the instructions in the wizard.
- To start a review, select the PDF and choose Send For Review > Send For Shared Review or Send For Review > Attach For Email Review.

See also

"Combining files into PDFs" on page 119

"Starting and managing a review" on page 157

Erase the history of opened PDFs

1 Select a History subcategory in the categories pane.

2 Click Clear History in the files pane.

Maintaining the software

About the updating process

Acrobat application files and components can be updated in a variety of ways. Some updates are available when you open a PDF that triggers the updating process automatically. For example, if you open a form that uses Asian-language fonts, Acrobat asks whether you want to download the fonts. Other updates are available only from the Help menu, and you must install them manually. Some updates are available both automatically and manually.

Depending on your preferences settings, Acrobat downloads updates in the background.

Update the software

❖ Choose Help > Check For Updates, and follow any on-screen instructions.

Change updating preferences

1 Choose Help > Check For Updates.

2 In the Adobe Updater dialog box, click Preferences.

3 Select Automatically Check For Adobe Updates, and specify whether you want automatic checking on a weekly or monthly basis and whether or not you want to be asked before updates are downloaded.

4 Make sure that the application you are running (Adobe Reader or Adobe Acrobat) is selected as the software that will be updated.

5 If appropriate, click Browse to navigate to the location in which you want the downloads to be placed.

About Speed Launcher (Windows)

When you install Acrobat, the Speed Launcher program is installed into your computer's Common Startup group. The Speed Launcher shortens the time needed to start Acrobat.

Although this is not recommended, you can disable Speed Launcher by dragging its icon out of the Startup folder.

Note: *If you have both Acrobat and Reader installed on the same system, two Speed Launcher icons appear in the Startup folder. If you want to disable Speed Launcher, remove both Speed Launcher icons from the Startup folder.*

For more information about this topic, see the Adobe support website.

Manage plug-ins

Plug-ins add more functionality, but they also increase the memory needed. To minimize memory requirements, you may want to install only the plug-ins that you use. To load a plug-in correctly, you must place it in the plug-ins folder. You can temporarily disable plug-ins when starting your software.

Disable a plug-in

1 Do one of the following:

- (Windows) Open the plug_ins folder (Program Files/Adobe/ Acrobat 8.0/ Acrobat/plug_ins).
- (Mac OS) Control-click the application icon, and choose Show Package Contents. Then double-click the Contents folder and open the Plug-ins folder.

2 Select the plug-ins you do not want to load, and move them out of the folder. Some of the plug-ins may be in folders nested inside the plug-ins folder.

Disable all plug-ins temporarily

❖ Press the Shift key immediately after starting Acrobat.

Adobe Digital Editions

Acrobat 8 changes the way you open and manage eBooks. Now, you use the free Adobe® Digital Editions software to read and organize eBooks and other publications. Digital Editions is a separate web-based Rich Internet Application (RIA) that replaces the eBooks features in previous versions of Acrobat.

When you install Digital Editions, your existing bookshelf items are automatically imported and available within the new Digital Editions bookshelf experience. You can also manually import individual PDFs into your Digital Editions bookshelf.

Note: *When you double-click the icon for an eBook, Acrobat automatically opens the Digital Editions download website, where you can start installing the software.*

To learn more about how to make the transition to this new solution for eBooks and for a link to the secure download website, go to the Adobe website.

Non-English languages

Asian language PDFs

You can use Acrobat to view, search, and print PDF documents that contain Asian text (Traditional and Simplified Chinese, Japanese, and Korean). You can also use these languages when you fill in forms, add comments, and apply digital signatures.

Almost all of the Acrobat features are supported for Traditional and Simplified Chinese, Japanese, and Korean text.

In Windows, you must install the Asian language support files by using the custom installation and selecting the Asian Language Support options under Create Adobe PDF and View Adobe PDF.

PDFMaker and the Adobe PDF printer automatically embed most Asian fonts in your file when creating PDF files. You can control whether Asian fonts are embedded.

In Windows, you may be able to view and print files that contain Asian languages without having the necessary Asian language support installed on your system. If you try to open a PDF file for which language support is required, you are automatically prompted to install the required fonts.

Cyrillic, Central European, and Eastern European language PDFs

You can work with Adobe PDF files that contain Cyrillic text (including Bulgarian and Russian), Central European text, and Eastern European text (including Czech, Hungarian, and Polish) if the fonts are embedded in the PDF files. If the fonts are embedded, you can view and print the files on any system. Fonts do not need to be embedded to use the Search feature.

Note: *If you open a PDF file in which form fields or text boxes contain these languages but the fonts are not embedded and are not installed on your system, choosing Help > Check For Updates Now automatically prompts you to download and install the necessary fonts.*

Hebrew, Arabic, Thai, and Vietnamese language PDFs

Acrobat supports the entry and display of Thai and Vietnamese text. In Windows only, Acrobat also supports Arabic and Hebrew. By default, Right-To-Left Language Options is enabled under Arabic and Hebrew regional settings (in Windows).

Enable right-to-left languages

Enabling right-to-left language options displays the user interface elements for controlling paragraph direction, digit style, and ligature. When this option is selected, you can specify the writing direction (left-to-right or right-to-left) and type of digits (Western or Arabic-Indic) used for creating and filling out certain form fields, adding digital signatures, and creating text box markups.

Enable Right-To-Left Language Options is enabled by default under Arabic and Hebrew regional settings.

1. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).
2. Under Categories, select International.
3. Select Enable Right-To-Left Language Options.

Chapter 3: Creating PDFs

Adobe PDF is the solution of choice for capturing robust information from any application on any computer system. You can create PDFs from blank pages, document files, scanned paper documents, and clipboard images.

Quickstart

Following are quick steps for some common PDF creation tasks.

Create from a file

To create a PDF from within Acrobat, the application that created the original file must be installed on the system in most cases.

1 Click the Create PDF button and choose From File.

2 Select the file you want to convert, and click Open.

The authoring application opens automatically or a progress dialog box appears. If the file is in an unsupported format, a message appears, telling you that the file cannot be converted to a PDF.

See also

"Convert a file to PDF" on page 61

Create from a paper document

You can create a PDF directly from a paper document using Acrobat and your scanner.

1 Click the Create PDF button and choose From Scanner.

2 Select the input, output, and document options in the Acrobat Scan dialog box, and then click Scan.

3 If creating a new PDF, specify a filename and location, and click Save.

4 Select Scan More Pages or Scanning Complete.

See also

"Scan a paper document to PDF" on page 63

Create from a web page

You can download and convert web pages from the top level, or any number of subordinate levels, of a URL.

1 Click the Create PDF button and choose From Web Page.

2 Type the URL into the text box. (Click Browse to convert a web page you have already downloaded.)

3 Specify the number of levels to download and where to download files from, and then click Create.

See also

"Convert web pages to PDF in Acrobat" on page 91

Create from scratch

You can create small PDFs that can be edited in Acrobat.

1 Choose File > Create PDF > From Blank Page.

2 Click in the document and begin typing. Use options on the New Document toolbar to change text attributes.

3 Save the document.

4 To continue editing, choose Document > Resume Editing.

To convert the PDF so that it cannot be re-edited, choose Document > Prevent Further Edits.

See also

"Create a PDF from a blank page" on page 62

Create from Word

After you install Acrobat, an Acrobat PDFMaker toolbar is added to Microsoft® Word. In Word 2007 for Windows, you access the PDFMaker options from the Acrobat ribbon instead of the toolbar.

1 In Word, open the file you want to convert.

2 Do one of the following:

- (Word 2007 for Windows) Click Acrobat and then click the Create PDF button .
- (Other versions of Word) Click the Convert To Adobe PDF button .

3 Specify a filename and location, and click Save.

4 (Mac OS only) Click View File or Done.

You can also convert a file to PDF and then email it for review by clicking Create And Send For Review (Office 2007) or Send For Review (other versions of Office).

See also

"Creating PDFs with PDFMaker" on page 73

Create from Outlook (Windows)

After you install Acrobat, an Acrobat PDFMaker toolbar is added to Outlook.

1 Select the desired email messages and click Create Adobe PDF From Selected Messages .

2 Specify a filename and location, and click Save.

The selected messages are converted to a PDF package or a merged PDF, depending upon conversion settings. To convert email folders, select the desired folders and click Create Adobe PDF From Folders . You can also automatically archive email messages and folders.

See also

"Convert email messages to PDFs (Windows)" on page 77

Automatically archive email (Windows)

You can automatically archive your Outlook email messages as PDFs.

1 In Outlook, choose Adobe PDF > Setup Automatic Archival.

2 Click the Automatic Archival tab, and select Enable Automatic Archival.

3 Specify frequency and run time. If desired, set up a log file and embedded index.

4 Click Add, select the desired folders, and specify a filename and location for the archive.

To create an archive immediately, click Run Archival Now.

See also

"Set up automatic email archiving (Windows)" on page 79

Create from Lotus Notes (Windows)

After you install Acrobat, an Acrobat PDFMaker toolbar is added to IBM Lotus Notes and commands are added to the Actions menu.

1 Select the desired email messages and click Convert Selected Messages To Adobe PDF .

2 Specify a filename and location, and click Save.

The messages are converted to a merged PDF or a PDF package, depending upon conversion settings. You can convert an entire folder to PDF by clicking Convert Selected Folder To Adobe PDF .

See also

"Convert email messages to PDFs (Windows)" on page 77

Create from Internet Explorer (Windows)

You can convert an entire web page or a selected portion of it to PDF.

1 In Microsoft Internet Explorer, open the web page you want to convert.

2 (Optional) Drag to select the text and images you want to convert.

3 Click Convert Web Page To PDF .

4 Specify a filename and location, and click Save.

You can also convert one or more web pages, and even entire websites, from within Acrobat.

See also

"Convert web pages to PDF in Internet Explorer (Windows)" on page 89

Create using Adobe PDF printer

In many applications, you can use the Print command with the Adobe PDF printer to convert a file to PDF.

1 Open the file you want to convert, and choose File > Print.

2 Choose Adobe PDF from the list of printers, and print the file.

3 If prompted, specify a filename and location, and click Save.

You can also choose a different default Adobe PDF printer setting or create a customized setting.

See also

"Create PDFs by printing to file" on page 69

Overview of creating PDFs

What's the best way to create a PDF?

There are many correct answers to this question. You create a PDF by converting other documents and resources to Portable Document Format.

Adobe Acrobat is a powerful tool with many uses, but it is not an *authoring application*—that is, not an application in which you design page layouts, write text, or create and place images on a blank page. Instead, it works in harmony with other applications and built-in operating system features to produce PDFs that you can then use for a variety of purposes.

The best method for creating a PDF depends on several things:

- What is the source document?

You can create PDFs from documents printed on paper, Word documents, InDesign files, images taken by a digital camera, and spreadsheets, to name just a few examples. Different types of sources have different tools available for PDF conversion.

- What is already running on your computer?

You can save time by using the most readily available Acrobat conversion feature. If the document you want to convert is already open in its authoring application (for example, a spreadsheet that is open in Excel), there are several ways to convert the file to PDF without opening Acrobat. Similarly, if Acrobat is already open, you don't have to open the authoring application to convert a file to PDF.

- How will you use the PDF?

Every PDF strikes a balance between efficiency (small file size) and quality (such as resolution and color). When that balance is critical to your task, you'll want to use a method that includes access to various conversion options as a part of the process.

For example, you can drag and drop files on the Acrobat icon on the desktop to create PDFs, but Acrobat simply applies the most recently used conversion settings without offering you access to those settings. If you want more control over the process, another method might be a better choice.

Note: *In Acrobat 8, you can also create a new PDF from a blank page.*

See also

"Create a PDF from a blank page" on page 62

PDF creation methods by file type

Refer to the following lists to determine the methods available for the different types of files.

Most files

These methods can be used for documents and images in almost all file formats.

Create PDF menu Within Acrobat, by choosing From File.

Adobe PDF printer Within most applications, in the Print dialog box.

Drag and drop On the desktop, in Windows Explorer or in Mac OS Finder.

Context menu On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

Paper documents

Requires a scanner and a hard copy of the document.

Create PDF menu Within Acrobat, by choosing From Scanner. Or, for previously scanned paper documents, by choosing From File.

Document menu Within Acrobat, by choosing Scan To PDF.

Microsoft Office documents

PDFMaker Within the authoring application, in the PDF toolbar and on the Adobe PDF menu. For Office 2007 applications, in the Acrobat Ribbon and on the Microsoft Office Button menu.

Adobe PDF printer Within the authoring application, in the Print dialog box.

Drag and drop On the desktop, in Windows Explorer or in Mac OS Finder.

Context menu On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

Email messages

PDFMaker (Windows only) Within Microsoft Outlook or Lotus Notes, by clicking Acrobat PDFMaker toolbar buttons or choosing commands in the Adobe PDF menu (Outlook) or the Actions menu (Lotus Notes).

Adobe PDF printer Within the email application, in the Print dialog box. Creates a PDF (not a PDF package).

Web pages

Create PDF menu Within Acrobat, by choosing From Web Page.

PDFMaker Within Internet Explorer or when editing in a web-authoring application that supports PDFMaker, such as Word; in the Acrobat PDFMaker toolbar and on the Adobe PDF menu.

Adobe PDF printer Within Internet Explorer or when editing in a web-authoring application that supports PDFMaker, such as Word; in the Print dialog box.

Drag and drop On the desktop, in Windows Explorer or in Mac OS Finder, dragging the HTML file.

Context menu (HTML files) On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking the HTML file).

Images copied on the clipboard

Create PDF menu Within Acrobat, by choosing From Clipboard Image.

Adobe Creative Suite files

Adobe PDF printer Within the authoring application, in the Print dialog box.

Export Within InDesign or Adobe GoLive®, on the File menu. (In InDesign, using the file type menu in the Export dialog box; in GoLive, using the HTML As Adobe PDF command on the Export submenu.)

Save As Within Adobe Photoshop® or Adobe Illustrator, on the File menu and using the file type menu in the Save As dialog box.

Drag and drop On the desktop, in Windows Explorer or in Mac OS Finder.

Context menu On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

AutoCAD files

Create PDF menu Within Acrobat, by choosing From File.

PDFMaker Within AutoCAD, in the Acrobat PDFMaker toolbar or on the Adobe PDF menu.

Adobe PDF printer Within AutoCAD, in the Print dialog box.

Context menu On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

PostScript and EPS files

Drag and drop On the desktop, in Windows Explorer or in Mac OS Finder, by dragging to the Acrobat Distiller icon or into the Acrobat Distiller window.

Double-clicking (PostScript files only) On the desktop, in Windows Explorer or Mac OS Finder.

Open command Within Acrobat Distiller, on the File menu.

Create PDF menu Within Acrobat, by choosing From File.

Adobe PDF printer Within the authoring application, in the Print dialog box.

Context menu On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

3D captures

Note: *Requires Adobe Acrobat 3D. Adobe Acrobat Professional and Adobe Acrobat Standard cannot convert 3D files to PDF.*

Create PDF menu Within Acrobat 3D, by choosing From 3D Capture.

Adobe PDF printer Within the authoring application, in the Print dialog box.

Context menu On the desktop, in Windows Explorer or in Mac OS Finder (by right-clicking/Control-clicking).

Balancing PDF file size and quality

There are important settings that you can select so that your PDF has the best balance between file size, resolution, conformity to specific standards, and other factors. Which settings you select depends on your goals for the PDF that you are creating. For example, a PDF intended for high-quality commercial printing requires different settings than a PDF intended only for on-screen viewing and quick downloading over the Internet.

Once selected, these settings apply across PDFMaker, Acrobat, and Acrobat Distiller. However, there are some settings that are limited to specific contexts or file types. For example, PDFMaker options can vary among the different types of Microsoft Office applications.

For convenience, you can select one of the conversion presets available in Acrobat. You can also create, define, save, and reuse custom presets that are uniquely suited to your purposes.

See also

"Adobe PDF conversion settings" on page 99

Creating simple PDFs with Acrobat

Convert a file to PDF

1 In Acrobat, do one of the following:

- Choose File > Create PDF > From File.
- On the toolbar, click the Create PDF button  and choose From File.

2 In the Open dialog box, select the file you want to convert to PDF. You can browse all file types or select a specific type in the Files Of Type menu.

3 (Optional) Click Settings to change the conversion options. The options available vary depending on the file type.

Note: *The Settings button is unavailable if you choose All Files as the file type or if no conversion settings are available for the selected file type.*

4 Click Open to convert the file to a PDF.

Depending on the type of file being converted, the authoring application opens automatically or a progress dialog box appears. If the file is in an unsupported format, a message appears, telling you that the file cannot be converted to PDF.

5 When the new PDF opens, choose File > Save or File > Save As; then select a name and location for the PDF.

When naming a PDF that's intended for electronic distribution, limit the filename to eight characters (with no spaces) and include the .pdf extension. This ensures that email programs or network servers don't truncate the filename and that the PDF opens as expected.

See also

"View PDFMaker conversion settings" on page 75

"Combining PDF content" on page 116

Drag and drop to create PDFs

This method is usually best reserved for small, simple files, such as small image files or plain text files, when the balance between file size and output quality is not important. You can use this technique with many other types of files, but you won't have the opportunity to adjust any conversion settings during the process.

1 Using Explorer (Windows) or the Finder (Mac OS), select the file icons of one or more files that you want to convert to PDF.

2 Drag the file icons onto the Acrobat application icon. Or, (Windows only) drag the files into the open Acrobat window.

If a message appears saying that the file could not be opened in Acrobat, then that file type cannot be converted to PDF by the drag-and-drop method. Use one of the other conversion methods for that file.

Note: *You can also convert PostScript and EPS files to PDF by dragging them onto the Acrobat Distiller window or the Distiller application icon.*

3 Save the PDF.

(Windows only) You can also right-click a file in Windows Explorer and choose Create PDF.

Convert clipboard images to PDF

You can create PDFs from screen captures and other images you copy from an image-editing application.

❖ Use the method described for the operating system running on your computer:

- (Windows) Capture a displayed image to the Clipboard, either by using the Copy command in an image-editing application, such as Adobe Photoshop, or by pressing the PrintScreen key. Then in Acrobat, choose File > Create PDF > From Clipboard Image, or choose From Clipboard Image in the Create PDF toolbar menu.
- (Mac OS) Choose Acrobat > Services > Grab > [Screen, Selection, or Timed Screen]. (Grab is the Mac OS X screen-capture utility.) Your screen capture automatically converts to a PDF and opens.

Note: *The From Clipboard Image command appears only when there is an image copied to the clipboard. If the clipboard is empty or if you have copied text to the clipboard, the command does not appear.*

Create a PDF from a blank page

Adobe® Acrobat® 8 Professional introduces the PDF Editor feature. With it, you can create a PDF from a blank page rather than beginning with a file, a clipboard image, or scanning.

This process can be useful for creating relatively small PDFs of up to about a dozen pages. For longer, more complex, or heavily formatted new documents, it's usually better to create the source document in an authoring application that offers more layout and formatting options, such as Adobe InDesign or various business software products.

Note: *The PDF Editor can make changes in text only with PDFs created from blank pages. To add a blank page to a PDF created by another method, create a blank document in another application and convert that file to PDF and import it into the existing PDF.*

Create and add text to a new, blank PDF

1. Choose File > Create PDF > From Blank Page.
2. Begin typing the text you want to add to the blank page.
3. Add any formatting to the text by selecting it and selecting options on the New Document toolbar.
4. As needed, select other tools and options that you want to apply to the PDF.
5. Choose File > Save, and select a name and location for the PDF file.

Note: *When the page is filled with text, the PDF Editor automatically adds a new blank page to the document.*

Edit text in a PDF created from a blank page

1. Choose File > Open, and locate and select a PDF created with PDF Editor (that is, one created from a blank page).
2. Choose Document > Resume Editing.
3. Add text and formatting as needed.

Prevent changes in PDF Editor

You can freeze the text you have added to PDFs created from a blank page. This prevents anyone from adding or changing the text. There is no Undo for this process.

1. Choose Document > Prevent Further Edits.
2. In the message that appears, click Prevent Further Edits to confirm your choice. Or, click Keep Text Editable if you want to continue adding or editing text with the PDF Editor.

3 In the Save As dialog box, select a new name and location for the file, or leave the original name and location selected to replace the original file with the uneditable version.

Preferences for the PDF Editor

You can access the PDF Editor preferences options by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and then selecting New Document in the list under Categories.

Font Specifies the font family that will be used by default for typing on a new, blank page.

Size Specifies the font size of the default font.

Default Margins Specifies the measurements of the insets from the edges of the page: Left, Right, Top, and Bottom.

Size (under Default Page) Specifies the standard paper size, such as Letter, Tabloid, A4, and so on.

Orientation Specifies whether the longer side of the page runs horizontally (Landscape) or vertically (Portrait).

Scan a paper document to PDF

You can create a PDF file directly from a paper document, starting within Acrobat and using your scanner. In Windows XP, Acrobat supports TWAIN scanner drivers and Windows Image Acquisition (WIA) drivers.

If you need to convert large numbers of paper documents to PDF archives, consider purchasing Adobe Acrobat Capture®.

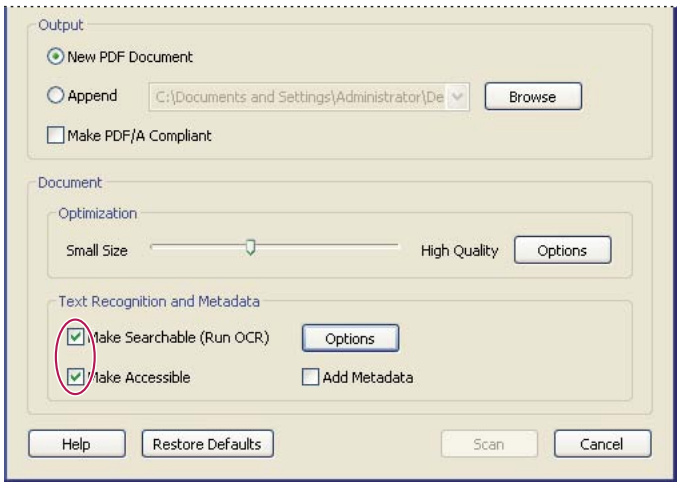
Note: *You can also scan paper forms in a way that converts them into interactive PDF forms. See "Creating new forms" on page 212.*

Scan a paper document directly to PDF

1 In Acrobat, do one of the following:

- Choose File > Create PDF > From Scanner.
- Choose Document > Scan To PDF.
- Choose From Scanner from the Create PDF menu on the toolbar.

2 In the Acrobat Scan dialog box, select basic scanning options.



Note: *The Options button under Text Recognition And Metadata is not available unless Make Searchable (Run OCR) is selected.*

3 As needed, click Scanner Options and the two Options buttons to access advanced settings for your selected scanner, Optimization Options, and Recognize Text settings.

Note: *If you specify that you want to use your scanner's native interface instead of the Acrobat interface, other windows or dialog boxes appear. Consult the scanner manufacturer's documentation for more information on available options. In Mac OS, the scanner's interface is always shown.*

4 Click Scan.

5 Click the Scan More Pages (Put Sheet *N*+1) option if you are scanning multiple pages (where *N* is the number of pages already scanned); click Scanning Complete and OK if you are finished scanning.

Optimize a scanned PDF

1 Open a PDF created from a scanned document.

2 Choose Document > Optimize Scanned PDF.

3 Select options in the dialog box, and click OK.

The options available in the Optimized Scanned PDF dialog box also appear in the Optimization Options dialog box, which are described in detail under that heading in this topic.

Basic scanning options

Scanner Select an installed scanner. You must have the manufacturer's scanning software installed on your computer.

Scanner Options (Windows only) Click to open the Scanner Options dialog box. (Available only after you select a scanner.)

Sides Specify single or double-sided scanning. If you select Both Sides and the scanner's own settings are for only one side, the scanner setting overrides the Acrobat settings.

Note: *You can scan both sides of pages even on scanners that do not themselves support two-sided scanning. When Both Sides is selected, a dialog box appears after the first sides are scanned. You can then reverse the original paper documents in the tray, select the Scan Reverse Side (Put Reverse Of Sheets) option in that dialog box, and click OK to scan the back sides of the paper pages. This produces a PDF with all pages in the proper sequence.*

Color Mode (Windows only) Select a basic color mode (Color, Black and White, or Grayscale) supported by your scanner. This option is enabled if your Scanner Options are set to use the Acrobat scanning dialog box instead of the scanner application.

Resolution (Windows only) Select a resolution supported by your scanner. This option is enabled if your Scanner Options are set to use the Acrobat scanning dialog box instead of the scanner application.

Note: *If you select a Color Mode or Resolution option not supported by your scanner, a message appears and your scanner's application window opens, where you can select different options.*

New PDF Document Select this to create a new PDF; deselect it if you want to append the scanned pages to an existing PDF.

Append Select this if you want to add the converted scan to an existing PDF. Use the pop-up menu to select an open PDF or click Browse to find and select another PDF.

Make PDF/A Compliant Select this option to make the PDF conform to ISO standards for PDF/A-1b. When selected, only Searchable Image (Exact) is available in the Recognize Text - Settings dialog box for the PDF Output Style option.

Optimization Drag the slider to set the balance point between file size and quality. Click the Options button if you want to customize optimization with specific settings for file compression and filtering.

Make Searchable (Run OCR) Select this option to make text and images in the PDF searchable and selectable. This option applies OCR and font and page recognition to the text images and converts them to normal text. Click the Options button to select specific settings in the Recognize Text - Settings dialog box. See "Recognize text in scanned documents" on page 67.

Make Accessible Select this option to add tags to the document, which improve accessibility for disabled users. (Available only when Make Searchable (Run OCR) is selected.)

Add Metadata Select this if you want to add information about the scanned document to the PDF file. When this option is selected, the Document Properties dialog box appears after scanning, where you can type in the metadata you want to add.

Scanner Options dialog box

Data Transfer Method Native Mode transfers in the default mode for your scanner. Memory Mode is automatically selected for scanning in resolutions over 600 dots per inch (dpi).

User Interface The Hide Scanner's Native Interface option bypasses the windows and dialog boxes provided by the scanner manufacturer. Instead, scanning from Acrobat opens the Acrobat Scan dialog box.

Paper Size The menu lists available standard page sizes.

Invert Black And White This option creates positive images from black-and-white negatives, for example.

Optimization Options dialog box

The Optimization Options dialog box for image settings controls how scanned images are filtered and compressed for the PDF. Default settings are suitable for a wide range of document pages, but you may want to customize settings for higher-quality images, smaller file sizes, or scanning issues.

Automatic Applies default settings to balance file size and quality at a moderate level.

- **Aggressive** Applies settings that minimize file size. In some cases, selecting this option may visibly affect the quality of the scanned PDF.

Custom Settings Makes additional settings available under Compression and Filtering and disables the Aggressive setting under Automatic. If you select Custom Settings, the Color/Grayscale or Monochrome settings are available, depending on the option you selected in the Acrobat Scan dialog box.

Color/Grayscale settings When scanning color or grayscale pages, select one of the following:

- **Lossless** Does not apply compression or filters—such as Deskew, Background Removal, and so forth—to scanned pages.

- **Adaptive** Divides each page into black-and-white, grayscale, and color regions and chooses a representation that preserves appearance while highly compressing each kind of content. Recommended scanning resolutions are 300 pixels per inch (ppi) for grayscale and RGB input, or 600 ppi for black-and-white input.

- **JPEG** Applies JPEG compression to the entire grayscale or RGB input page.

Note: *The scanner uses either the selected Color/Grayscale option or the selected Monochrome option. Which one is used depends on the settings you select in the Acrobat Scan dialog box or in the scanner's TWAIN interface, which may open after you click Scan in the Acrobat Scan dialog box. (By default, the scanner application dialog box does not open.)*

Monochrome When scanning black-and-white or monotone images, select one of the following:

• **JBIG2** Applies the JBIG2 compression method to black-and-white input pages. Settings of 0.95 or higher use the lossless method; at lower settings, text is highly compressed. Text pages typically are 60% smaller than CCITT Group 4 compressed pages, but processing is slow. Compatible with Acrobat 5.0 (PDF 1.4) and later.

Note: *For compatibility with Acrobat 4.0, use a compression method other than JBIG2.*

• **Adaptive** (As described above, under Color/Grayscale settings.)

• **CCITT Group 4** Applies CCITT Group 4 compression to black-and-white input page images. This fast, lossless compression method is compatible with Acrobat 3.0 (PDF 1.2) and later.

Deskew Rotates any page that is not square with the sides of the scanner bed, to make the PDF page align vertically. Choose Automatic or Off.

Background Removal Whitens nearly white areas of grayscale and color input (not black-and-white input).

For best results, calibrate your scanner's contrast and brightness settings so that a scan of a normal black-and-white page has dark gray or black text and a white background. Then, Off or Low should produce good results. If scanning off-white paper or newsprint, use Medium or High to clean up the page.

Edge Shadow Removal Removes dark streaks that occur at the edges of scanned pages, where the scanner light is shadowed by the paper edge. Choose Off, Cautious, or Aggressive.

Despeckle Removes isolated black marks in black-and-white page content. Low uses a basic peephole filter. Medium and High use both a peephole filter and a large area filter that removes larger spots farther from nearby features.

Descreen Removes halftone dot structure, which can reduce JPEG compression, cause moire patterns, and make text difficult to recognize. Suitable for 200–400 ppi grayscale or RGB input or, for Adaptive compression, 400–600 ppi black-and-white input. The Automatic setting (recommended) applies the filter for 300 ppi or higher grayscale and RGB input. Select Off when scanning a page with no pictures or filled areas, or when scanning at a resolution higher than the effective range.

Halo Removal When On (recommended), removes excess color at high-contrast edges, which may have been introduced during either printing or scanning. This filter is used only on color input pages.

Scanning tips

- Acrobat scanning accepts images between 10 and 3000 ppi. If you select Searchable Image or Formatted Text & Graphics for PDF Output Style, input resolution of 72 ppi or higher is required, and input resolution higher than 600 ppi is downsampled to 600 ppi or lower.
- On the Color/Grayscale menu in the Optimization Options dialog box, apply lossless compression to a scanned image by choosing CCITT for black-and-white images or Lossless for color or grayscale images. If this image is appended to a PDF document, and the file is saved by Save, the scanned image remains uncompressed. If the PDF document is saved using Save As, the scanned image may be compressed.
- For most pages, black-and-white scanning at 300 ppi produces text best suited for conversion. At 150 ppi, OCR accuracy is slightly lower, and more font-recognition errors occur; at 400 ppi and higher resolution, processing slows and compressed pages are bigger. If a page has many unrecognized words or very small text (9 points or smaller), try scanning at higher resolution. Scan in black and white whenever possible.

- When Recognize Text Using OCR is disabled, full 10-to-3000 ppi resolution range may be used, but the recommended resolution is 72 and higher ppi. For Adaptive compression, 300 ppi is recommended for grayscale or RGB input, or 600 ppi for black-and-white input.
- Pages scanned in 24-bit color, 300 ppi, at 8-1/2–by-11 inches (21.59-by-27.94 cm) result in large images (25 MB) prior to compression. Your system may require 50 MB of virtual memory or more to scan the image. At 600 ppi, both scanning and processing typically are about four times slower than at 300 ppi.
- Avoid dithering or halftone scanner settings. These can improve the appearance of photographs, but they make it difficult to recognize text.
- For text printed on colored paper, try increasing the brightness and contrast by about 10%. If your scanner has color-filtering capability, consider using a filter or lamp that drops out the background color. Or if the text isn't crisp or drops out, try adjusting scanner contrast and brightness to clarify the scan.
- If your scanner has a manual brightness control, adjust it so that characters are clean and well formed. If characters are touching, use a higher (brighter) setting. If characters are separated, use a lower (darker) setting.

Recognize text in scanned documents

You can use Acrobat to recognize text in previously scanned documents that have already been converted to PDF.

OCR runs with header/footer/Bates number on image PDF files.

1. Open the scanned PDF.
2. Choose Document > OCR Text Recognition > Recognize Text Using OCR.
3. In the Recognize Text dialog box, select an option under Pages.
4. (Optional) Click Edit to open the Recognize Text - Settings dialog box, and select the options you want to use.

Recognize Text - Settings

Optical Character Recognition (OCR) software enables you to search, correct, and copy the text in a scanned PDF. If you do not apply OCR when you create a PDF by scanning a paper document, you can apply OCR to the PDF later if you have set the scanner resolution at 72 ppi and higher.

OCR runs with header/footer/Bates number on image PDF files.

Primary OCR Language Specifies the language for the OCR engine to use to identify the characters.

PDF Output Style Determines the type of PDF to be produced. All options require an input resolution of 72 ppi or higher (recommended). All formats apply OCR and font and page recognition to the text images and convert them to normal text.

- **Searchable Image** Ensures that text is searchable and selectable. This option keeps the original image, deskews it as needed, and places an invisible text layer over it. The selection for Downsample Images in this same dialog box determines whether or not the image will be downsampled and to what extent.

- **Searchable Image (Exact)** Ensures that text is searchable and selectable. This option keeps the original image and places an invisible text layer over it. Recommended for cases requiring maximum fidelity to the original image.

- **Formatted Text & Graphics** Reconstructs the original page using recognized text, fonts, and graphic elements. The accuracy of the results depends on the scanning resolution and other factors. You may need to review and correct the OCR text in the new PDF page after scanning.

Note: *The Formatted Text & Graphics option is available for only some languages.*

Black-and-white scanning at 300 ppi produces the best text for conversion. At 150 ppi, OCR accuracy is slightly lower, and more font-recognition errors occur. For text printed on colored paper, try increasing the brightness and contrast by about 10%. If your scanner has color-filtering capability, consider using a filter or lamp that drops out the background color.

Downsample Images Decreases the number of pixels in color, grayscale, and monochrome images after OCR is complete. Choose the degree of downsampling that you want to apply. Higher-numbered options do less downsampling, producing higher-resolution PDFs.

Correct OCR text in PDFs

When you scan to Formatted Text & Graphics output, Acrobat analyzes bitmaps of text and substitutes words and characters for those bitmap areas. If the ideal substitution is uncertain, Acrobat marks the word as suspect. Suspects appear in the PDF as the original bitmap of the word, but the text is included on an invisible layer behind the bitmap of the word. This makes the word searchable even though it is displayed as a bitmap. You can accept these suspects as they are, or you can use the TouchUp Text tool to correct them.

Note: *If you try to select text in a scanned PDF that does not have OCR applied, or try to perform a Read Out Loud operation on an image file, Acrobat asks if you want to run OCR. If you click OK, the Recognize Text dialog box opens and you can select options, which are described in detail under the previous topic.*

1 Do one of the following:

- Choose Document > OCR Text Recognition > Find All OCR Suspects. All suspect words on the page are enclosed in boxes. Click any suspect word to show the suspect text in the Find Element dialog box.
- Choose Document > OCR Text Recognition > Find First OCR Suspect.

Note: *If you close the Find Element window before correcting all suspect words, you can return to the process by choosing Document > OCR Text Recognition > Find First OCR Suspect, or by clicking any suspect word with the TouchUp Text tool.*

2 In the Find option, choose OCR Suspects.

3 Compare the word in the Suspect text box with the actual word in the scanned document, and accept, correct, or ignore the word. If the suspect was incorrectly identified as text, click the Not Text button.

4 Review and correct the remaining suspect words, and then close the Find Element dialog box.

Enable Fast Web View in a PDF

Fast Web View restructures a PDF document for page-at-a-time downloading (byte-serving) from web servers. With Fast Web View, the web server sends only the requested page, rather than the entire PDF. This is especially important with large documents that can take a long time to download from a server.

Check with your webmaster to make sure that the web server software you use supports page-at-a-time downloading. To ensure that the PDF documents on your website appear in older browsers, you may also want to create HTML links (versus ASP scripts or the POST method) to the PDF documents and use relatively short path names (256 characters or fewer).

Verify that an existing PDF is enabled for Fast Web View

❖ Do one of the following:

- Open the PDF in Acrobat, and choose File > Properties. Look in the lower right area of the Description panel of the dialog box for the Fast Web View setting (Yes or No).

- (Windows only) In Windows Explorer, right-click the PDF file icon and choose Properties. Click the PDF tab and look near the bottom of the panel for the Fast Web View setting (Yes or No).

Verify the Fast Web View Preferences setting

Follow this procedure to make sure that you have Acrobat set up to enable Fast Web View during the PDF creation process.

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

2 Under Categories, select Documents.

3 On the right side of the dialog box, under Save Settings, make sure that Save As Optimizes For Fast Web View is selected, or select it now, and click OK.

Enable Fast Web View for an existing PDF

Use this procedure after you have verified your Fast Web View Preferences setting and checked the PDF properties to be sure that the file is not already enabled for Fast Web View.

1 Open the PDF that you want to have Fast Web View.

2 Choose File > Save As. Select the same filename and location.

3 When a message appears asking if you want to overwrite the existing file, click OK.



You can also quickly enable Fast Web View in entire folders of Adobe PDF files by using a batch sequence. See "Run a predefined batch sequence" on page 364.

Using the Adobe PDF printer

Create PDFs by printing to file

In many authoring applications, you can use the Print command with the Adobe PDF printer to convert your file to PDF. Your source document is converted to PostScript and fed directly to Distiller for conversion to PDF, without manually starting Distiller. The current Distiller preference settings and Adobe PDF settings are used to convert the file. If you're working with nonstandard page sizes, create a custom page size.

Note: *The Adobe PDF printer creates untagged PDFs. A tagged structure is required for reflowing content to a handheld device and is preferable for producing reliable results with a screen reader.*

See also

"Creating accessible PDFs" on page 299

Create a PDF using the Print command (Windows)

1 Open the file that you want to convert to a PDF in its authoring application, and choose File > Print.

2 Choose Adobe PDF from the printers menu.

3 Click the Properties (or Preferences) button to customize the Adobe PDF printer setting. (In some applications, you may need to click Setup in the Print dialog box to access the list of printers, and then click Properties or Preferences.)

4 In the Print dialog box, click OK.

Note: *By default, your PDF is saved in the folder specified in the printer port. The default location is My Documents. The filename and destination are controlled by the Prompt For Adobe PDF Filename setting in the Adobe PDF Printing Preferences dialog box.*

Create a PDF using the Print command (Mac OS)

1 Open the file that you want to convert to a PDF in its authoring application, and choose File > Print.

2 Choose Adobe PDF 8.0 from the printers menu.

3 Choose PDF Options from the pop-up menu that is beneath the Presets menu (it may show Copies & Pages by default).

4 For Adobe PDF Settings, choose one of the default settings, or customize the settings using Distiller. Any custom settings that you have defined are listed.

For most users, the default Adobe PDF conversion settings are adequate.

5 For After PDF Creation, specify whether or not to open the PDF.

6 Click Print.

7 Select a name and location for your PDF, and click Save.

Note: *By default, your PDF is saved with the same filename and a .pdf extension.*

Adobe PDF printing preferences (Windows)

Printing preferences apply to all applications that use the Adobe PDF printer, unless you change the settings in an authoring application by using the Page Setup, Document Setup, or Print menu.

Note: *The dialog box for setting printing preferences is named Adobe PDF Printing Preferences, Adobe PDF Printing Defaults, or Adobe PDF Document Properties, depending on how you access it.*

To access printing preferences:

- Click the Start button and choose Settings > Printers And Faxes. Right-click the Adobe PDF printer, and choose Printing Preferences.
- In an authoring application such as Adobe InDesign, choose File > Print. Select Adobe PDF as the printer, and click the Properties (or Preferences) button. (In some applications, you may need to click Setup in the Print dialog box to access the list of printers, and then click Properties or Preferences to customize the Adobe PDF settings.)

PDF-specific options appear in the Adobe PDF Settings tab. The Paper Quality tab and Layout tab contain other familiar options for the paper source, printer ink, page orientation, and number of pages per sheet.

Note: *Printing Preferences are different from printer Properties. The Preferences include Adobe PDF-specific options for the conversion process; the Properties dialog box contains tabs of options that are available for any type of printer.*

Adobe PDF Conversion Settings Select a predefined set of options from the Default Settings menu or click Edit to view or change the settings in the Adobe PDF Settings dialog box.

Adobe PDF Security To add security to the PDF, choose one of the following options, or click Edit to view or change the security settings:

- **Reconfirm Security For Each Job** Opens the Adobe PDF - Security dialog box each time you create a PDF using the Adobe PDF printer. Specify settings in the dialog box.
- **Use The Last Known Security Settings** Uses the same security settings that were used the last time a PDF was created using the Adobe PDF printer on your computer.

Adobe PDF Output Folder Choose an output folder for the converted PDF, or click Browse to add or change the output folder. Choose Prompt For Adobe PDF Filename to specify a location and filename at conversion time.

Adobe PDF Page Size menu Select a custom page size that you have defined.

View Adobe PDF Results Automatically starts Acrobat and displays the converted document immediately.

Add Document Information Includes information such as the filename and date and time of creation.

Rely On System Fonts Only; Do Not Use Document Fonts Deselect this option to download fonts when creating the PDF. All your fonts will be available in the PDF, but it will take longer to create it. Leave this option selected if you are working with Asian-language documents.

Delete Log Files For Successful Jobs Automatically deletes the log files unless the job fails.

Ask To Replace Existing PDF File Warns you when you are about to overwrite an existing PDF with a file of the same name.

See also

"Create and use a custom page size" on page 72

Set Adobe PDF printer properties (Windows)

In Windows, you can usually leave the Adobe PDF printer's properties unchanged, unless you have configured printer sharing or set security.

Note: *Printing Properties are different from printer Preferences. The Properties dialog box contains tabs of options that apply to any type of printer; the Preferences include conversion options specifically for the Adobe PDF printer.*

Set Adobe PDF printer properties

1. Open the Printers window from the Start menu, and right-click the Adobe PDF printer.
2. Choose Properties.
3. Click the tabs, and select options as needed.

Reassign the port that the Adobe PDF printer uses

1. Quit Distiller if it is running, and allow all queued jobs to the Adobe PDF printer to complete.
2. Open the Printers window from the Start menu.
3. Right-click the Adobe PDF printer, and choose Properties.
4. Click the Ports tab, and then click Add Port.
5. Select Adobe PDF Port from the list of available port types, and click New Port.
6. Select a local folder for PDF output files, and click OK. Then click Close to quit the Printer Ports dialog box.
7. In the Adobe PDF Properties dialog box, click Apply, and then click OK.

For best results, select a folder on the same system where Distiller is installed. Although remote or network folders are supported, they have limited user access and security issues.

Delete a folder and reassign the Adobe PDF printer to the default port

1. Quit Distiller if it is running, and allow a few minutes for all queued jobs to Adobe PDF to complete.
2. Open the Printers window from the Start menu.

3 Right-click the Adobe PDF printer, and choose Properties.

4 Click the Ports tab.

5 Select the default port, My Documents, and click Apply.

6 Select the port to delete, click Delete Port, and then click Yes to confirm the deletion.

7 Select the My Documents port again and click Close.

Configure the Adobe PDF printer (Mac OS)

In Mac OS, you must configure the Adobe PDF printer in three places: Distiller, your authoring application's Page Setup menu, and your authoring application's Print dialog box.

1 In Distiller, specify the Adobe PDF settings, font locations, and security.

2 In an authoring application such as Adobe InDesign, choose File > Page Setup.

3 Select Adobe PDF 8.0 from the Format For menu.

4 Specify the paper size, orientation, and scale as necessary.

5 In your authoring application, choose File > Print, and select Adobe PDF 8.0 from the Printer menu.

6 In the pop-up menu below the Presets menu, choose PDF Options, and set any of the following options:

- Select a set of predefined conversion settings from the Adobe PDF Settings menu if you want to override default settings. Default settings are the settings currently defined in Distiller.
- Specify whether to open the converted files in Acrobat in the After PDF Creation menu.

7 Specify print settings as desired in the other menus available in the pop-up menu below the Presets menu.

Create and use a custom page size

It's important to distinguish between *page size* (as defined in the source application's Document Setup dialog box for your document) and *paper size* (the sheet of paper, piece of film, or area of the printing plate you'll print on). Your page size might be U.S. Letter (8-1/2-by-11 inches or 21.59-by-27.94 cm), but you might need to print on a larger piece of paper or film to accommodate any printer's marks or the bleed area. To ensure that your document prints as expected, set up your page size in both the source application and the printer.

The list of paper sizes available to Acrobat comes from the PPD file (PostScript printers) or from the printer driver (non-PostScript printers). If the printer and PPD file you've chosen for PostScript printing support custom paper sizes, you see a Custom option in the Paper Size menu. For printers capable of producing very large print areas, Acrobat supports pages as large as 15,000,000 inches (38,100,000 cm) by 15,000,000 inches (38,100,000 cm).

Create a custom page size (Windows)

1 Do one of the following:

- Open the Printers or Printer And Faxes window from the Start menu. Right-click the Adobe PDF printer, and choose Printing Preferences.
- In an authoring application such as Adobe InDesign, choose File > Print. Select Adobe PDF as the printer, and click the Properties button. (In some applications, you may need to click Setup in the Print dialog box to access the list of printers, and then click Properties or Preferences to customize the Adobe PDF settings.)

2 In the Adobe PDF Settings tab, click the Add button next to the Adobe PDF Page Size menu.

3 Specify the name, width, height, and unit of measurement. Click Add/Modify to add the custom page size name to the Adobe PDF Page Size menu.

Create a custom page size (Mac OS)

1 In an authoring application such as Adobe InDesign, choose File > Page Setup.

2 In the Settings pop-up menu, select Custom Paper Size.

3 Click the New button.

4 Specify the name, height, width, and margins. The unit of measurement depends on the system language.

5 Click Save, and then click OK.

Use the custom page size

1 Choose File > Print Setup.

2 Select the new custom page size from the Paper Size menu, and click OK.

Creating PDFs with PDFMaker

About Acrobat PDFMaker

PDFMaker is an Acrobat feature that operates within many business applications, such as Microsoft Office applications and Lotus Notes. When you install Acrobat, PDFMaker controls appear in the work area of the authoring application.

Using PDFMaker within an authoring application is a simple, one-click procedure. It involves clicking an Acrobat PDFMaker toolbar button or (Windows only) choosing a command on the Adobe PDF menu. It is not necessary to open Acrobat.

Use PDFMaker to convert a file to PDF (Windows)

In Windows, Acrobat installs both an Acrobat PDFMaker toolbar and an Adobe PDF menu in many popular authoring applications. You can use either the toolbar buttons or the Adobe PDF menu (the Action menu in Lotus Notes) to create PDFs, but the menu also provides access to conversion settings. Although many of the conversion options are common to all authoring applications, a few are application-specific.

For Microsoft Office 2007 applications such as Word, Excel, and PowerPoint, the options for creating PDFs are available from the Acrobat Ribbon.

Note: *If you don't see the PDF toolbar buttons in an application, choose View > Toolbars > Acrobat PDFMaker 8.0. Or, in Lotus Notes only, choose File > Preferences > Toolbar Preferences, click Toolbars, and select the Visible check box for Acrobat PDFMaker 8.0.*

See also

"Customize Adobe PDF settings" on page 101

"Create PDFs from Word mail merges" on page 80

Convert a file to PDF

1 Open the file in the application used to create it.

2 Click the Convert To Adobe PDF button on the Acrobat PDFMaker toolbar, or (if available) choose Adobe PDF > Convert To Adobe PDF. (In Lotus Notes only, PDF conversion commands appear on the Actions menu.)

For Microsoft Office 2007 applications such as Word, Excel, PowerPoint, and Access, click the Create PDF button on the Acrobat Ribbon.

3 In the Save Adobe PDF File As dialog box, enter a filename and location for the PDF, and click Save.

Create a PDF as an email attachment

1 Open the file in the application used to create it.

2 Choose Adobe PDF > Convert To Adobe PDF And Email.

For Microsoft Office 2007 applications such as Word, Excel, PowerPoint, and Access, click the Create And Attach To Email button on the Acrobat Ribbon.

When the conversion is finished, a blank message with the new PDF included as an attachment automatically opens in your default email application. You can then address and complete the message and either send it or save it as a draft.

Attach a file as PDF (Outlook)

1 In the Outlook email Message window, click the Attach As PDF button.

Note: *If the Attach As PDF button isn't visible, in Outlook, choose Adobe PDF > Change Conversion Settings, and then select Show Attach As Adobe PDF Buttons. The Attach As PDF button is not available for Outlook 2007.*

2 Select a file to attach, and click Open.

Convert files to a secured PDF and attach it to an email message (Outlook)

1 In the Outlook email Message window, click the Attach As Secured Adobe PDF button.

Note: *The Attach As Secured Adobe PDF button appears only after you've configured an Adobe LiveCycle Policy Server using the Advanced > Security Settings menu.*

2 Click Browse, select a file to convert, and click Open.

3 Specify the users that can open the PDF, and then click OK:

- To specify only users that receive the PDF, select Restrict Access Only To People In This Message's To:, Cc:, And Bcc: List. In this case, the PDF isn't secured until you send the email message.
- To specify only users that are specified by a security policy, select Restrict Access By Applying The Following Security Policy, and then select a security policy in the list. In this case, the PDF is secured before it is attached to the email message.

4 If prompted, enter your user name and password to log in to the Adobe Policy Server.

Create a PDF and send it for review

1 Open the file in the application used to create it.

2 Click the Convert To Adobe PDF And Send For Review button on the Acrobat PDFMaker toolbar, or (if available) choose Adobe PDF > Convert To Adobe PDF And Send For Review.

For Microsoft Office 2007 applications such as Word, Excel, PowerPoint, and Access, click the Create And Send For Review button on the Acrobat Ribbon.

3 When the Identity Setup dialog box appears, enter the appropriate information about yourself, and click Complete.

4 Follow the directions in the wizard that appears, as described in "Start an email-based review" on page 158.

Use PDFMaker to convert a file to PDF (Mac OS)

The default Acrobat installation adds Convert To Adobe PDF buttons to Office application toolbars. You can use these buttons to create Adobe PDF files quickly and easily from Microsoft Word, Excel, and PowerPoint files without opening Acrobat.

The PDF creation process applies the currently selected conversion settings. If you want to change those settings, you must open Acrobat Distiller and select options there. In most cases, the default settings produce good results.

Note: *Password-protected Excel files can't be converted to PDF on Mac OS. Also, many PowerPoint features aren't converted when you produce a PDF from a PowerPoint file on Mac OS. For example, animations and transitions aren't converted.*

1 Open the file in the Office application.

2 On the Adobe Acrobat PDFMaker 8 toolbar, select one of the following:

- Convert To Adobe PDF.
- Convert To Adobe PDF And EMail.

3 In the Save dialog box, type a filename, select a folder in which to save the PDF, and click Save.

4 When the conversion is complete, choose View File if you want to open the new PDF in Acrobat, or Done if you want to close the Acrobat PDFMaker status dialog box without opening the PDF.

If you selected Convert To Adobe PDF And Email, the newly created PDF is attached to a blank email that opens in your default email application. You can either address, complete, and send the message immediately or save it as a draft to send later.

See also

"Customize Adobe PDF settings" on page 101

View PDFMaker conversion settings

PDFMaker conversion settings vary according to file types. For example, the options available for PowerPoint files aren't the same as those available for Outlook files. Once you've selected conversion settings, those choices apply to all subsequent PDFs you create from that file type. It's a good idea to review the settings occasionally.

1 Open a PDFMaker-enabled application (such as Word or Excel).

2 Do one of the following:

- (Lotus Notes) Choose Actions > Change Adobe PDF Conversion Settings.
- (Office 2007 applications) Choose Acrobat > Preferences.
- (All other applications) Choose Adobe PDF > Change Conversion Settings.

3 (Optional) To revert to the original default settings, click Restore Defaults on the Settings tab.

Note: *PDFMaker isn't available for email applications on Mac OS.*

See also

"Application-specific features of PDFMaker" on page 77

"Adobe PDF conversion settings" on page 99

Settings tab of the Conversion Settings

The settings available for PDFMaker depend on the application in which you're using PDFMaker.

Conversion Settings Specifies the standard by which the PDF will be optimized. When you choose an item in the menu, a description of that preset appears immediately below it.

View Adobe PDF Result Opens the converted document directly into Acrobat. (Exception: when you choose Convert To Adobe PDF And Email.)

Prompt For Adobe PDF File Name Lets you enter a custom filename for the resulting PDF. Deselect this option to save the file in the same folder as the source file, using the same name but with a .pdf extension.

Convert Document Information Adds document information from the Properties dialog box of the source file. This setting overrides the printer preferences and settings in the Advanced panel of the Adobe PDF Settings dialog box.

Note: *The Advanced Settings button opens the Adobe PDF Settings dialog box, which contains many additional conversion options. These conversion settings apply to all Acrobat features that create PDFs, such as Acrobat Distiller, PDFMaker, and the Acrobat application itself.*

Create PDF/A Compliant PDF File Creates the PDF so that it conforms to this ISO standard for long-term preservation of electronic documents. (In the Microsoft Publisher application alone, PDFMaker does not support the PDF/A standard.)

Note: *When Conversion Settings are opened from within Word, Excel, or PowerPoint, this option specifies PDF/A 1-a:2005. When opened from within Microsoft Visio, Access, Microsoft Project, AutoCAD, or Publisher, it specifies PDF/A 1-b:2005.*

Security tab of the Conversion Settings

The settings available for PDFMaker depend on the application in which you're using PDFMaker.

Require A Password To Open The Document When selected, makes the Document Open Password option available, where you type to set a password that users must use in order to open the document.

Restrict Editing And Printing Of The Document When selected, makes the other Permissions options available.

Change Permissions Password Specifies a password you set that users must use in order to do any allowable printing or editing.

Printing Allowed Specifies whether users who use the Permissions Password can print the document and at what resolution.

Changes Allowed Specifies what kind of changes users who use the Permissions Password can make.

Enable Copying Of Text, Images, And Other Contents Prevents or allows users from copying from the PDF.

Enable Text Access For Screen Reader Devices For The Visually Impaired Prevents or allows screen reader devices to access text. (Selected by default.)

Enable Plaintext Metadata Specifies whether or not the search engine can access the document metadata. Available only when the PDF-compatibility is set to Acrobat 6.0 (PDF 1.5) or later.

Application-specific features of PDFMaker

Convert email messages to PDFs (Windows)

You can use PDFMaker to convert one or more Microsoft Outlook or Lotus Notes email messages or entire folders of messages to a merged PDF or PDF package. Within a package, each email message appears as a separate PDF file.

The Acrobat PDFMaker Conversion Settings dialog box contains the option that determines whether email messages are merged into one continuous PDF or assembled into a PDF package.

The controls that activate an email conversion to PDF appear in two places within the email application: on the Acrobat PDFMaker toolbar and on a menu. In Outlook, the menu is called Adobe PDF and appears to the right of the Outlook Help menu. In Lotus Notes, PDF commands appear under the Actions menu.

You can convert one currently open email message to PDF (not to a PDF package) by choosing File > Print, and selecting Adobe PDF as the printer in the Print dialog box. The PDFMaker conversion settings do not affect this process.

See also

"Application-specific PDFMaker settings" on page 85

"Create and manage an index in a PDF" on page 375

Specify whether email messages become merged PDFs or PDF packages

1 Do one of the following:

- (Outlook) Choose Adobe PDF > Change Conversion Settings.
- (Lotus Notes) Choose Actions > Change Adobe PDF Conversion Settings.

2 Do one of the following:

- To convert and merge email messages into a PDF as sequential pages of one document, deselect Output Adobe PDF Package When Creating A New PDF File.
- To assemble converted email messages as components of a PDF package, select Output Adobe PDF Package When Creating A New PDF File.

Convert an open email message to PDF (Outlook)

❖ Choose Adobe PDF > Convert To Adobe PDF.

You can also convert a different file to PDF from within an open Outlook email message if the Attach As Adobe PDF toolbar is shown. Clicking this button opens a series of dialog boxes for selecting and saving the new PDF and also starts Acrobat, if it is not already running. The resulting PDF is attached to the open email message.

Convert email messages to a new PDF

1 In Outlook or Lotus Notes, select the individual email messages that you want to archive.

2 Do one of the following:

- (Outlook) Click the Convert Messages button in the Acrobat PDFMaker toolbar, or choose Adobe PDF > Convert To Adobe PDF > Selected Messages.
- (Lotus Notes) Click the Convert Selected Messages To Adobe PDF button in the Acrobat PDFMaker toolbar, or choose Actions > Convert Selected Messages To Adobe PDF.

3 In the Save Adobe PDF As dialog box, select a location, type a filename, and click Save.

Note: *For security reasons, the default settings in Outlook 2003 block automatic downloading of pictures in HTML email messages from unknown senders and sites. If you want to download such images and include them in the conversion to PDF, you can change that setting in Outlook by choosing Tools > Options, clicking the Security tab, and then clicking the Change Automatic Download Settings, where specific options are available. For more information, see the Outlook Help system.*

Add email messages to an existing PDF

1 In Outlook or Lotus Notes, select the individual email messages that you want to convert and add to a PDF.

2 Do one of the following:

- (Outlook) Choose Adobe PDF > Convert And Append To Existing Adobe PDF > Selected Messages.
- (Lotus Notes) Choose Actions > Append Selected Messages To Existing Adobe PDF.

3 Locate and select the PDF or PDF package to which you want to add the converted emails, and click Open.

Important: *Do not type a new name for the PDF. If you do, a warning message appears telling you that the PDF was not found. Click OK, and select a PDF without changing its name.*

4 (Outlook only) If a message appears, alerting you that the existing PDF was creating using an earlier version of PDFMaker, do one of the following:

- To create a PDF package from the original PDF archive, click Yes, and select a name and location for the new archive. (The default name adds *_Packaged* to the original PDF filename.) When the conversion is complete and the Creating Adobe PDF dialog box closes, the new archive opens in Acrobat.
- To not create a PDF package from the original PDF archive, click No and cancel the process.

Note: *In earlier versions of Acrobat and for email merged into a single PDF, messages might be duplicated when running the append process. For PDF packages of email converted or migrated in Acrobat 8, only new messages—that is, messages that are not already part of the PDF package—are appended.*

(Lotus Notes) Convert an email folder to a new PDF

1 In Lotus Notes, select the folder that you want to convert to PDF.

2 Click the Convert Selected Folder To Adobe PDF button  on the Acrobat PDFMaker toolbar, or choose Actions > Convert Selected Folder To Adobe PDF.

3 In the Save Adobe PDF File As, specify a location and name for the PDF package, and click Save.

To convert other Lotus Notes folders to PDF, repeat this procedure for each folder.

(Outlook) Convert email folders to a new PDF

In Outlook, PDFMaker can convert multiple folders to PDF in one procedure. It is not necessary to select those folders at the beginning of the process because you can make these selection in a dialog box that appears automatically.

1 In Outlook, choose Adobe PDF > Convert To Adobe PDF > Selected Folders.

2 In the Convert Folder(s) To PDF dialog box, select the folders you want to convert, and then select or deselect the Convert This Folder And All Sub Folders option.

3 In the Save Adobe PDF File As, select a location and name for the PDF package.

The Creating Adobe PDF status dialog box shows the progress of the conversion. When the conversion is complete, the new PDF opens in Acrobat.

Migrating old Outlook PDF archives to PDF packages (Windows)

There are two good reasons for migrating old PDF email archives to PDF packages: to facilitate sorting and other functions, and to make it possible to add new email messages to those archives.

In PDF packages, each email message is converted as a component PDF. You can then sort the messages by message folder, sender, subject line, date, size, or attachments. Also, you can create custom categories and sort by those.

You can open email archives you created with earlier version of Acrobat in Acrobat 8.0, but you cannot add email messages to that archive in the same way. If you try, messages will appear that will guide you through the process of creating a new archive from the old one and appending the selected messages to the new PDF package archive.

Migrate old Outlook PDF archives to PDF packages (Windows)

1 Open Outlook.

2 Choose Adobe PDF > Migrate Old PDF Archives To PDF Packages.

3 If a message appears, click Yes to continue the migration process.

4 Locate and select the old PDF archive, and click Open.

5 Select a location and name for the migrated PDF package, and click Save. (The default naming adds *_Packaged* to the existing filename, such as renaming an archive called *Inbox.pdf* as *Inbox_Packaged.pdf*.)

When the conversion process is complete and the Creating Adobe PDF dialog box closes, the new archive opens in Acrobat.

Set up automatic email archiving (Windows)

In Microsoft Outlook, you can set up PDFMaker to automatically archive your email messages.

1 In Outlook, choose Adobe PDF > Setup Automatic Archival.

2 On the Automatic Archival tab of the Acrobat PDFMaker dialog box, select Enable Automatic Archival, and then select options for Frequency and the time of day at which automatic archiving occurs.

3 Select other options, according to your needs:

Maintain Log Of Archival Creates a record of each archiving session.

Choose File Specifies the name and location of the archiving log.

Embed Index For Faster Search Creates an index that you can search to find specific words or characters instead of having to search each individual document.

4 Click Add, and select the email folders and subfolders that you want PDFMaker to archive. Then select or deselect the Convert This Folder And All Sub Folders option, as preferred, and click OK.

5 In the Save PDF Archive File As dialog box, select a name and location for the archived email PDF. Then click Open.

6 Review the settings and the archive folder names listed in the Acrobat PDFMaker dialog box, and do any of the following:

- To add other email folders to the list, click Add and select the folder.
- To remove folders from the list, select the ones you want to remove and click Delete.
- To make changes to an archive file, select any folder name on the list, click Change Archive File, and specify the name and location.
- To start archiving email immediately, click Run Archival Now.

Create PDFs from Word mail merges

Mail merges from Word generate documents like form letters—for one common example—which are personalized with information like the names and addresses of the individuals to whom they will be sent. With Acrobat PDFMaker, you can save steps by using a Word mail merge document and corresponding data file to output mail merges directly to PDF. You can even set up PDFMaker to attach those PDFs to email messages that are generated during the PDF-creation process.

Note: *For more information on setting up files for the Word Mail Merge feature, see Microsoft Office Word Help.*

1 In Microsoft Word, open the template that you have created as the basis of your mail merge, or create the file using the Word Mail Merge toolbar and Mail Merge wizard, as needed.

Important: *Do not complete the mail merge in Word. Instead, set up and preview the mail merge as usual, so that you can verify that the merge will work correctly.*

2 Do one of the following:

- Choose Adobe PDF > Mail Merge To Adobe PDF.
- Click the Mail Merge To Adobe PDF button on the Mail Merge toolbar (View > Toolbars > Mail Merge).
- (Word 2007) Choose Acrobat > Mail Merge.

3 In the Acrobat PDFMaker - Mail Merge dialog box, select the options you want:

- To specify which records in the data file will be imported into the merged files, select All or Current, or enter a range of pages by typing in the From and To boxes.
- To name the PDF that will be created, type in the Specify PDF File Name box.

Note: *The PDF will be named using this text plus a series of numbers. For example, if you type* ***JulyLetter*** *in the Specify PDF File Name box, the mail-merged PDFs might appear as JulyLetter_0000123, JulyLetter_0000124, July Letter_0000125, and so forth.*

4 For Automatically Send Adobe PDF Files By Email, do one of the following:

- To create and save merged PDFs for printing or sending later in email, leave the option deselected, and click OK.
- To create merged PDFs and attach each one to an email message to the appropriate recipient, select this check box, and fill in the other Email options.

5 When the Browse For Folder dialog box appears, navigate to the location you want to use and click OK.

Status indicators appear as PDFMaker generates the individual PDFs, which takes an amount of time that is proportional to the complexity of the merge and the number of PDFs you create.

6 If you selected Automatically Send Adobe PDF Files By Email, a dialog box appears asking for your email profile. Enter the appropriate information and click OK.

When the job is finished, a message appears, telling you that the process was successful.

Email options for PDF mail merges

To Use the pop-up menu to select the field or column in the associated data file that contains the email addresses in each individual's record.

Subject Line Type the text that you want to appear in the subject line of each message.

Message Type to add or edit text that you want to appear in the body of the email messages.

PDFs from Microsoft Project, Publisher, and Access (Windows)

There are specific differences to be aware of when you create PDFs from files authored in these applications:

Microsoft Project You can create PDFs of only the currently selected view. Views designated as nonprintable in Project cannot be converted to PDF.

Note: *Converting Project files requires Acrobat Professional or Acrobat 3D.*

Microsoft Publisher PDFs converted from Microsoft Publisher support crop marks, links, bookmarks, spot colors, transparency, bleed marks, printing bleed marks, and CMYK color conversion.

Microsoft Access When creating PDFs from Access files, the process can involve two additional steps:

- You must select the object in the Access file to be created as a PDF before using the PDFMaker button or command.
- You can choose Adobe PDF > Convert Multiple Reports To Single Adobe PDF. For Access 2007, click Acrobat and then click Convert Multiple Report. You can select individual reports that you want to include, and click Add Report(s). When all of the reports that you want to convert appear in the Reports In PDF list, click Convert to start creating the PDF.

Note: *When you convert an Access 2003 or Access 2002 file to PDF, Access reports, tables, queries, and forms are converted. When you convert an Access 2000 file to PDF, only reports are converted.*

Convert Visio files to PDF (Windows)

PDFs created from Visio files preserve page sizes and support layers, searchable text, custom properties, links, bookmarks, and comments, depending on your settings in the conversion settings. (Choose Adobe PDF > Change Conversion Settings to review these, if needed.)

When you convert your Visio file, only shapes and guides that are printable and visible in the Visio drawing are converted and appear in the PDF. Shapes are converted regardless of their protection or behavior. Shape custom properties can be converted to PDF object data.

When you convert the Visio file to a PDF, you can preserve all or just some layers, or you can flatten all layers. If you flatten layers, the PDF will look like the original drawing, but won't contain any layer information. When flattened, the contents of only visible and printable layers will appear in the converted PDF.

See also

"Adobe PDF conversion settings" on page 99

Convert Visio files

1 If you want to change the PDFMaker conversion settings, open Visio and choose Adobe PDF > Change Conversion Settings. (For information about a setting, place the pointer over the setting to display a tool tip below.)

2 If you want to convert each page in the Visio file to a bookmarked page in the PDF file, choose Adobe PDF > Convert All Pages In Drawing. If this option is deselected, only the current page is converted.

3 Do one of the following:

- Click the Convert To Adobe PDF button in the Adobe PDF toolbar.
- Choose Adobe PDF > Convert To Adobe PDF.
- Choose Adobe PDF > Convert To Adobe PDF And EMail. The PDF file attaches to a new email message in your default email application.

- Choose Adobe PDF > Convert To Adobe PDF And Send For Review. The file converts to an Adobe PDF file, and an email-based review process begins.

4 If you want to include the custom properties of shapes, select that option.

5 Click Continue.

6 Select a layers option to retain or flatten layers in the resulting PDF, and click Continue.

Note: *If you select Retain Some Layers In The Selected Page, you'll be prompted to choose which Visio layers to include.*

7 Click Convert To Adobe PDF, specify a location and filename, and click Save.

Select Visio layers to convert

You can convert a Visio drawing that contains layers to a PDF and retain some or all of the layers in the resulting PDF, or you can flatten the layers. You can also organize the Visio layers in *layer sets*, which are folders in the Acrobat Layers panel.

1 With the multilayered file open in Visio, click a button in the Adobe PDF toolbar, and select Retain Some Layers In The Selected Page.

Note: *If the Retain Some Layers In The Selected Page option is not available, deselect the Convert All Pages In Drawing option.*

2 Select one or more layers in the Layers In Visio Drawing list:

- To select a single layer, click the name of the layer.
- To select all layers, right-click and choose Select All.
- To select more than one layer, Ctrl-click the desired layers. (You can also Ctrl-click a layer to remove it from a selection.)

3 To add the selected Visio layers to the list of layers to convert to the PDF file, do one of the following:

- To convert the selected Visio layers to individual PDF layers within a PDF layer set, click Create Layer Set, and optionally, type a layer name.
- To convert the selected Visio layers to individual layers (but not grouped under a layer set), click the Add Layer(s) button.

Note: *The name of a layer in the Layers In Visio Drawing list is unavailable if that layer is included in the Layers In PDF list. When you select that layer in the Layers In PDF list, a bullet appears next to the layer's name in the Layers In Visio Drawing list.*

4 Optionally, do any of the following:

- To reorder the layers in the Layers In PDF list, drag an item up or down in the list.
- To include a visibility property that can be switched on or off in Acrobat, deselect Locked On adjacent to the PDF layer; to lock the resulting PDF layer's visibility on, select Locked On.
- To save the current settings of Visio layers selected, click Save PDF Settings, and click OK. These settings are used the next time you convert the current Visio file to a PDF file.

5 Click Convert To PDF, specify a folder in the Save In box in which to save the PDF file, type a filename, and then click Save.

Note: *Visio layers that were selected for conversion and that have Visio settings for visible, printable, or lock are converted to PDF layers; the visible and printable properties are included in the resulting PDF layers. If the Visio file contains a background page, header, or footer, the PDF file automatically has PDF layers named for those items.*

Convert AutoCAD files to PDF (Windows)

If you're working in AutoCAD, you can convert files from within the application with the Acrobat PDFMaker.

Note: *Converting AutoCAD files in DWF or DST formats to PDF requires use of the default filters installed with the AutoCAD application. For more information, refer to the AutoCAD application documentation.*

See also

"Adobe PDF conversion settings" on page 99

"What's the best way to create a PDF?" on page 58

Convert AutoCAD files when AutoCAD is not installed

The default Acrobat installation installs Autodesk filters that allow you to convert files with DWG, DWF, or DST format into PDF, without the native application installed. All layers and layouts will be created in the PDF file.

For information about different methods to convert AutoCAD files to PDF, see "PDF creation methods by file type" on page 58.

Convert AutoCAD files when AutoCAD is installed

The default Acrobat installation adds two Convert To Adobe PDF buttons to the toolbar that allow you to convert your AutoCAD data into a PDF that preserves layers and layouts. You can create PDF settings to define the layers and layer status in the resulting PDF. You can then name, save, and reuse these settings for subsequent conversions.

Note: *Acrobat PDFMaker automatically acquires and uses the necessary page size and plotting information of the respective layout to create a correctly sized PDF file.*

1 If you want to change the PDF conversion settings, choose Adobe PDF > Change Conversion Settings in AutoCAD. (For information on the conversion settings, place the pointer over each option to display a tool tip.)

2 Do one of the following:

- Click a button on the Adobe PDF toolbar: Convert To Adobe PDF  or Convert To Adobe PDF And Send For Review button .
- Choose Adobe PDF > Convert To Adobe PDF.
- Choose Adobe PDF > Convert To Adobe PDF And Email.
- Choose Adobe PDF > Convert To Adobe PDF And Send For Review.

3 To select which AutoCAD layouts to include in the resulting PDF and their order, do any of the following in the Acrobat PDFMaker dialog box, and then click OK:

- To include one or more AutoCAD layouts, select the layouts in the Layouts In Drawing list, and click Add.
- To remove AutoCAD layouts from the list of layouts to include, select the layouts in the Layouts In PDF list, and click Remove.
- To reorder the PDF layouts, select a layout in the Layouts In PDF list, and click Move Up or Move Down.

4 To determine how the AutoCAD layers are converted, select one of the following, and click Continue:

- Flatten All Layers.
- Retain All Or Some Layers. The Acrobat PDFMaker dialog box displays a screen in which you must choose which layers to include in the resulting PDF.

5 Choose a location in which to save the resulting PDF file in the Save In box, type a filename, and click Save.

Select AutoCAD layers to convert

If you choose to create a PDF file that retains some AutoCAD layers, you can specify which layers are preserved in the PDF.

The Layers In Drawing list shows all the layers in the AutoCAD file. You transfer layers that you want to be present in the PDF from the Layers In Drawing list to the Layers In PDF list. Only layers and objects of layers present in the Layers In PDF list are present in the PDF.

1 In AutoCAD, start to convert an AutoCAD file and select the Retain All Or Some Layers option.

2 To show AutoCAD layers in the Acrobat PDFMaker dialog box, do any of the following:

- Choose an option from the Named Layer Filters menu to list all layers that fit that criterion.
- Select the Invert option to list all layers except those that are described by the selected choice in the Named Layer Filters menu.
- To change the sort order of the layers, click the headings.

Note: *To change a layer's On, Frozen, or Plot properties, click Cancel Conversion, change the properties in the AutoCAD drawing, and restart the procedure.*

3 Do any of the following to select the AutoCAD layers from the Layers In Drawing list that you want to convert and include in the PDF:

- To select a set of layers you've already saved, choose a layer setting from the PDF Layer Settings menu.
- To select a single layer, click the name of the layer.
- To select more than one layer, Ctrl-click the desired layers.
- To select all layers, right-click and choose Select All.

Note: *To navigate through the AutoCAD layers, use the Up and Down Arrow keys. Use the scroll bar at the bottom of the column to scroll horizontally through the table.*

4 To add the selected AutoCAD layers to the list of layers to convert to PDF, do one of the following:

- To convert the selected AutoCAD layers to individual PDF layers within a PDF layer set, click Create Layer Set, and optionally, type a layer name. (A PDF layer set is a folder for organizing layers in the Layers panel in Acrobat.)
- To convert the selected AutoCAD layers to individual layers, click the Add Layer(s) button.

The name of a layer in the Layers In Drawing list is unavailable if that layer is included in the Layers In PDF list. When you select that layer in the Layers In PDF list, a bullet appears next to the layer's name in the Layers In Drawing list.

5 Optionally, do any of the following:

- To reorder the layers in the Layers In PDF list, drag an item up or down in the list.
- To include a visibility property that can be switched on or off in Acrobat, deselect Locked On adjacent to the PDF layer; to lock the resulting PDF layer's visibility on, select Locked On.
- To save the current settings of AutoCAD layers selected, click Add PDF Settings, name the layer setting, and click OK. The Add PDF Settings button is unavailable unless you've added at least one AutoCAD layer from the Layers In Drawing list to the Layers In PDF list. These settings are used the next time you convert an AutoCAD file to PDF and can be renamed or edited at any time.

6 Click the Convert To PDF button, specify a folder in the Save In box in which to save the PDF file, type a filename, and then click Save.

Convert AutoCAD files in batches

❖ Choose Adobe PDF > Batch Conversion, and follow the instructions.

Application-specific PDFMaker settings

PDFMaker is a flexible feature of Acrobat that adapts according to its environment. The conversion settings available in one PDFMaker-enabled application may be different than those you would encounter within a different application.

Some PDFMaker settings are common to several or most applications. Some options are unique to a specific application.

See also

"Adobe PDF conversion settings" on page 99

"Convert web pages to PDF in Internet Explorer (Windows)" on page 89

"Settings for a single conversion for Office 2007 applications" on page 88

Settings tab options available from within most applications

The following settings appear on the Settings tab accessed from within most PDFMaker-enabled applications.

Attach Source File To Adobe PDF Includes the document being converted as an attachment to the PDF.

Add Bookmarks To Adobe PDF Converts certain elements in original Office documents to PDF bookmarks: Word headings, Excel worksheet names, or PowerPoint titles. Selecting this option overrides any settings in the Bookmarks tab of the Conversion Settings dialog box.

Note: *In Microsoft Publisher 2003 documents, PDFMaker includes Publisher headings as bookmarks in the PDF. PDFMaker does not support the conversion of Publisher 2002 bookmarks, links, transparency, or crop marks and bleed marks.*

Add Links To Adobe PDF Includes active links and hypertext in the PDF.

Enable Accessibility And Reflow With Tagged Adobe PDF Embeds tags in the PDF.

Excel-specific options on the Settings tab

Convert Comments To Notes Converts user-created Excel comments to notes and lists them in the Acrobat Comments panel.

Fit Worksheet To A Single Page Adjusts the size of each worksheet so that all the entries on that worksheet appear on the same page of the PDF.

Prompt For Selecting Excel Sheets Opens a dialog box at the beginning of the file conversion process, in which you can specify which worksheets are included in the PDF and the order in which the sheets appear in the PDF.

PowerPoint-specific options on the Settings tab

Convert Multimedia To PDF Multimedia Adds any linked audio-video files to the PDF.

Save Animations In Adobe PDF Converts any animation effects in the PowerPoint file to equivalent animations in the PDF.

Save Slide Transitions In Adobe PDF Converts PowerPoint slide transition effects to PDF transition effects.

Convert Hidden Slides To PDF Pages Converts any PowerPoint slides that are not seen in the usual playing of the presentation to PDF pages.

Convert Speaker Notes To Text Notes In Adobe PDF Converts any speaker notes for the PowerPoint presentation into Text notes in the PDF.

PDF Layout Based On PowerPoint Printer Settings Uses the same printer settings in the PDF as in the original file.

Email-specific options on the Settings tab

The following options appear when you open the PDFMaker settings from within Microsoft Outlook or Lotus Notes.

Attachments Indicates whether or not all files attached to email messages will be included in the new PDF.

Output Adobe PDF Package When Creating A New PDF File When selected, always converts individual messages as component files of a PDF package. When deselected, merges individual messages as separate pages of a PDF.

Embed Index For Faster Search Creates an embedded index, which speeds up searches, especially when you convert large numbers of email messages or message folders.

Show "Attach As Adobe PDF" Buttons If selected, the Attach As Adobe PDF button appears in the Outlook email message window.

Page Layout options Specify page properties, similar to those found in the Print dialog box: page dimensions, orientation, and margins.

AutoCAD-specific options on the Settings tab

Open Layers Pane When Viewed In Acrobat Shows layers structure when a PDF is opened in Acrobat or Adobe Reader.

Embed Scale Information Preserves drawing-scale information, which is usable with the Acrobat measurement tools.

Choose Layout Specifies whether Current Layout, All Layouts, or Selected Layouts are included in the PDF.

Choose Layer Specifies whether All Layers, Selected Layers, or No Layers are included as layers in the PDF.

Visio-specific options on the Settings tab

The following options appear when you open the PDFMaker settings from within Microsoft Visio.

Include Visio Custom Properties As Object Data In The Adobe PDF Indicates whether or not custom properties of the Visio image will be included as object data in the new PDF.

Exclude Visio Objects With No Custom Properties Indicates if the new PDF should exclude Visio objects without custom properties.

Convert Comments To Adobe PDF Indicates if the comments in the Visio file should be converted to PDF comments in the new PDF.

Always Flatten Layers In Adobe PDF Specifies if the layers should be flattened. If you flatten layers, the PDF will look like the original drawing, but won't contain any layer information. All shapes in the Visio drawing are converted, regardless of their protection or behavior, and shape custom properties can be converted to PDF object data.

Word 2007-specific options on the Settings tab

The following options appear when you open the PDFMaker settings from within Microsoft Word 2007.

Fully Functional PDF creates a fully functional, high-quality, and compact PDF file.

Quick And Simple PDF Creates a basic PDF file for viewing. The Bookmark and Word tab settings are not available for quick and simple PDFs.

Word tab settings (Microsoft Word)

Convert Displayed Comments To Notes In The Adobe PDF Changes any Word comment entries to PDF comments. If the currently open Word document contains comments, more options appear in the Comments list on this tab:

- **Reviewer** Lists the names of reviewers who have entered comments in the current Word document.
- **Include** When deselected, does not include that reviewer's comments in the PDF.
- **Notes Open** Specifies whether the PDF comment windows automatically open or are closed for that reviewer's comments.
- **Color** Shows the color for that reviewer's comment icons. Clicking the color icon repeatedly cycles through a limited set of available colors.

Convert Cross-References And Table Of Contents To Links Enables one-click navigation of these elements in the new PDF.

Convert Footnote And Endnote Links Integrates these into the PDF.

Enable Advanced Tagging Integrates this into the PDF.

Bookmarks tab settings (Microsoft Word)

The options you specify on this tab determine which items are converted into PDF bookmarks in the PDF.

Important: *The Add Bookmarks To Adobe PDF option on the Settings tab must be selected in order to include any bookmarks in the conversion process. If you deselect that option, it overrides any options you select on this tab and no bookmarks will be created.*

Convert Word Headings To Bookmarks Selects all the headings in the Elements list for conversion to PDF bookmarks.

Convert Word Styles To Bookmarks Selects all the text styles in the Elements list for conversion to PDF bookmarks. (Deselected by default.)

Convert Word Bookmarks Converts any user-created Word bookmarks to PDF bookmarks.

Element list Specifies which Word headings and styles will be converted as PDF bookmarks.

- **Element** Lists the names of all available Word headings and styles. The icons for Headings and Styles ¶ indicate the element types.
- **Type** Also indicates whether the element is a heading or style in the Word document.
- **Bookmark** Displays X's, indicating whether or not individual elements will be converted to PDF bookmarks. Clicking an individual Bookmark check box changes the selection status for that element.
- **Level** Specifies where the element will fit in the hierarchy structure of the PDF Bookmarks panel. Clicking an individual Level number opens a menu that you can use to change the value.

Note: *When some but not all of the available Word headings and styles are selected for conversion to PDF bookmarks, the marker in the corresponding check boxes at the top of the tab change. If all elements of the type are selected, a check mark appears. If only some of the elements of that type are selected, a colored square appears. Otherwise, the check box is empty.*

Settings for a single conversion for Office 2007 applications

For Word 2007, Excel 2007, and PowerPoint 2007 applications, if you want the settings to be used only for the selected conversion and not for future conversions, you can define the settings by accessing the conversion options from the Save Adobe PDF File As dialog box.

View and modify options for a single conversion

1 Click the Office button and choose Save As > Adobe PDF.

2 Select the View Result check box if you want to view the PDF file after the conversion is complete.

3 (Word 2007) Specify if you want the PDF to be complete and fully functional or if you just need a quick and simple PDF. The quick and simple PDF option does not allow you to create bookmarks from Word styles.

4 Click Adobe PDF Conversion Options to define the options to be used for the current conversion.

The initial settings in the Conversion Options dialog box are based on the options that you set using the Preferences button on the Acrobat Ribbon.

Converting web pages to PDF

Web pages and PDFs

The core of a web page is a file written in Hypertext Markup Language (HTML). Typically, the HTML file includes associations with other files that either appear on the web page or govern how it looks or works.

When you convert a web page to PDF, the HTML file and all associated files—such as JPEG images, Adobe Flash files, cascading style sheets, text files, image maps, and forms—are included in the conversion process.

The resulting PDF behaves much like the original web page. For example, the images, links, image maps, and most media files appear and function normally within the PDF. (Animated GIF files appear as still images, showing the last frame of the animation.)

Also, the PDF functions like any other PDF. For example, you can navigate through the file by scrolling or using bookmarks; users can add comments to it; you can add security, form fields, and other features that enhance it.

In preparing to convert web pages to PDF, there are decisions to consider that affect how you approach the conversion process:

- How much do you want to convert?

If you want to convert only a selected area of the currently open web page, use PDFMaker from within Internet Explorer. If you want to convert several levels or all of a multipage web site to PDF, work within Acrobat.

- Do you want to create a new PDF from the web pages or to append the converted pages to an existing PDF?

You can do this in either Acrobat or Internet Explorer PDFMaker, but you choose different buttons or commands to accomplish these things.

- Do you need to apply advanced conversion settings to the process?

The conversion settings available from within Internet Explorer are limited. Use Acrobat for the conversion process if you need to select additional settings. When you finish your selections and have converted at least one web page to PDF from within Acrobat, those settings will apply when you convert web pages from within Internet Explorer, too.

Note: *To convert Chinese, Japanese, and Korean (CJK) language web pages to PDF on a Roman (Western) system in Windows, you must have installed the CJK language support files while installing Acrobat. Also, it is preferable to select an appropriate encoding from the HTML conversion settings.*

Convert web pages to PDF in Internet Explorer (Windows)

When you install Acrobat, Internet Explorer (version 6.0 and later) gains an Adobe PDF toolbar. Using the commands on this toolbar, you can convert the currently displayed web page to PDF in various ways: You can convert the entire web page or just a selected part of it; you can create a new PDF or append the converted web page to an existing PDF. The Adobe PDF toolbar menu also contains commands that initiate further actions after conversion, such as attaching the new PDF to a new email message or printing it.



A menu on the PDF toolbar provides easy conversion and print capabilities.

Convert a web page to PDF

1. Start Internet Explorer and go to the web page that you want to convert to PDF.
2. Using the Adobe PDF toolbar menu, do one of the following:

Note: *If you don't see the Adobe PDF toolbar in Internet Explorer, choose View > Toolbars > Adobe PDF.*

- To create a new PDF from the currently open web page, choose Convert Web Page To PDF. Then select a location, type a filename, and click Save.
- To add a PDF of the currently open web page to another PDF, choose Add Web Page To Existing PDF. Then locate and select the PDF to which the converted file will be added, and click Save.
- To create and print a new PDF from the currently open web page, choose Print Web Page. When the conversion is complete and the Print dialog box opens, select options and click OK.
- To create a new PDF from the currently open web page and attach it to a blank email message, choose Convert Web Page And Email. Then select a location for the PDF, type a filename, and click Save. Type the appropriate information in the email message that opens after the conversion is complete.

Convert part of a web page to PDF

You can convert text or images on a web page. This is useful if you want to save content without saving navigation frames or advertising.

1. Drag the pointer to select text and images on a web page.
2. On the Adobe PDF toolbar menu, choose one of the following:

- To create a new PDF, choose Convert Web Page To PDF. Then select a name and location for the PDF.
- To append the selected content to another PDF, choose Add Web Page To Existing PDF. Then locate and select the PDF to which the selection will be added.

3. Make sure that Only Convert Selection is selected, and click Save.

Convert a linked web page to PDF

❖ In the open web page, right-click the linked text and choose one of the following:

- To convert the linked web page to a new PDF, choose Convert Link Target To Adobe PDF.
- To add the linked web page to an existing PDF, choose Convert Link Target To Existing PDF. Then locate and select the existing PDF, and click Save.

Set PDF conversion preferences for Internet Explorer (Windows)

The Internet Explorer PDF preferences determine only whether converted files open in Acrobat automatically, and whether you are prompted to confirm the deletion of files or addition of pages to an existing PDF.

1 In Internet Explorer, choose Preferences from the Adobe PDF toolbar menu.

2 Select and deselect options in the Adobe PDF Preferences, as needed:

- To continue working in Internet Explorer after the conversion without opening the new PDF in Acrobat, deselect Open PDF Files In Acrobat After Conversion.
- To delete PDF files without further notice, deselect Ask For Confirmation Before Deleting PDF Files.
- To append PDF files without further notice, deselect Ask For Confirmation Before Adding Pages To PDF Files.
- To skip alerts reminding you that the PDF file you are appending to has been changed, deselect Warn Before Adding Pages If The PDF File Has Been Modified.

Manage PDFs in Internet Explorer (Windows)

You can open the Adobe PDF Explorer Bar within Internet Explorer to see PDF files and folders on your computer in a familiar navigation-tree pane and format. All other types of files do not appear, which makes it easier to find the PDFs on your computer. You can move PDFs and folders, rename them, or delete them, just like in Windows Explorer.

The Adobe PDF Explorer Bar also contains buttons for converting the current web page to PDF or creating new folders on your computer.

Note: *When you right-click a web page, the context-sensitive menu includes some commands for converting PDFs. Which commands are available depends on the element you right-click on the web page. For example, the commands that appear when you right-click a text link differ from those that appear when you right-click ordinary text on the web page.*

1 Open the Adobe PDF pane in Internet Explorer, using one of the following methods:

- Choose Adobe PDF Explorer Bar from the Adobe PDF toolbar menu.
- Choose View > Explorer Bar > Adobe PDF.

2 In the Adobe PDF pane, manage folders by doing any of the following:

- To add a new folder, select the location for the folder in the tree structure and click New Folder, or right-click the location icon and choose New Folder.
- To rename a folder, right-click the folder, choose Rename, and type a new name.
- To delete a folder, right-click the folder and choose Delete.

Note: *Only PDF files appear in the navigation structure in the Adobe PDF pane, but other files may be present in folders. If you attempt to delete a folder that contains files that aren't visible, a confirmation message appears. If you're not sure that you want to delete those files, click No.*

3 In the Adobe PDF pane, manage PDFs by right-clicking a PDF and choosing one of the following:

Open In Internet Explorer Opens the selected PDF within the document pane of Internet Explorer.

Open In Acrobat Opens the selected PDF in a standalone instance of Acrobat.

Open Containing Folder Opens the folder in which the PDF is located, as a new instance of Windows Explorer.

Add Web Page To This File Converts the currently open web page to PDF and adds it as a new page to the selected PDF.

Add Selection To This File Converts your selection within the currently open web page to PDF and adds it as a new page to the selected PDF.

Note: *You can also rename or delete the selected PDF from the right-click menu.*

Convert web pages to PDF in Acrobat

Although you can convert an open web page to PDF from Internet Explorer, you get additional options when you run the conversion from the Acrobat application. For example, you can include an entire website in the PDF or just some levels of a website. Also, you can select Web Page Conversion options that apply when you create PDFs from web pages.

See also

"Asian language PDFs" on page 53

"Web Page Conversion options in Acrobat" on page 93

Convert a web page to PDF

1 In Acrobat, choose File > Create PDF > From Web Page, or click the Create PDF From Web Page button on the toolbar to open the dialog box.

2 In URL, enter the complete path to the web page, or click Browse and locate the HTML page that you want to convert.

3 Under Settings, enter the number of levels you want to include, or select Get Entire Site to include all levels from the website.

Note: *Some websites may have hundreds or even thousands of pages. This can take a long time to download, may make your system slow and unresponsive, and can even use up all available hard disk space and memory, causing a system crash. You may want to begin by downloading only one level of pages and then go through them to find particular links to download.*

4 Select one or both of the following options:

Stay On Same Path Downloads only web pages subordinate to the specified URL.

Stay On Same Server Downloads only web pages stored on the same server.

5 Click Settings, and review the selected options in the Web Page Conversion Settings dialog box. Make any changes you want on the General and Page Layout tabs, and click OK.

6 Click Create.

Note: *You can view PDF pages while they are downloading; however, you cannot modify a page until the download process is complete.*

If you closed the Download Status dialog box, Choose Advanced > Web Capture > Bring Status Dialogs To Foreground to see the dialog box again.

Add an unlinked web page to an existing PDF

Use this procedure to append pages to a writable PDF. If the original PDF is read-only, the result will be a new PDF rather than new pages in the existing PDF.

1 Open the existing PDF in Acrobat (the PDF to which you want to append a web page).

2 Choose Advanced > Web Capture > Create PDF From/Append Web Page.

3 Enter the URL to the web page you want to append and select options, as described for converting web pages to PDF, and then click Create.

Add a linked web page to an existing PDF

1 Open the previously converted PDF in Acrobat. If necessary, scroll to the page containing links to the pages you want to add.

2 Do one of the following:

- Click a web link in your PDF.
- Right-click/Control-click the web link, and choose Append To Document.
- Choose Advanced > Web Capture > View Web Links. The dialog box lists all the links on the current page or on the tagged bookmark's pages. Using the Shift key or Ctrl key as needed, click to select the linked pages you want to add, or click Select All. Click Properties to set the download options, as needed, and then click Download.
- Choose Advanced > Web Capture > Append All Links On Page.

Note: *After pages have been converted, links to these pages change to internal links, and clicking a link takes you to the PDF page, rather than to the original HTML page on the web.*

Convert a linked web page to a new PDF

1 Open the previously converted PDF in Acrobat. If necessary, scroll to the page containing a web link you want to convert.

2 Do one of the following:

- Right-click/Control-click the web link, and choose Open Weblink As New Document.
- Ctrl-click/Control-click the web link.

Note: *In Windows, you can also convert a linked page from a web page displayed in Internet Explorer, using a similar right-click command.*

Copy the URL of a web link

Use this procedure to copy the path for a web link to the clipboard, to use it for other purposes.

1 Open the previously converted PDF in Acrobat. If necessary, scroll to the page containing links to the pages you want to copy.

2 Right-click/Control-click the web link and choose Copy Link Location.

Change Acrobat web page conversion options

The settings for converting web pages to PDF apply to the conversion process. Any changes you make to these settings apply to PDFs you create from web pages after changing the settings. The settings changes do not affect existing PDFs.

Edit the web page conversion options

1 Choose File > Create PDF > From Web Page.

2 Click the Settings button.

3 On the General tab, select new options under File Type Settings and PDF Settings, as needed. If you select a text file type, you can click the Settings button to see additional options for that file type.

4 On the Page Layout tab, select options for page size, orientation, and scaling, as needed, and then click OK.

Reset web page conversion options to default settings

1 Choose Edit > Preferences.

2 Under Categories, select Web Capture, and then click Reset Conversion Settings To Defaults.

Web Page Conversion options in Acrobat

The Web Page Conversion Settings dialog box is available only from within Acrobat. The Settings button in the Create PDF From Web Page dialog box opens the Web Page Conversion Settings.

Note: *The options available in the Web Page Conversion Settings are different from those available in the Web Capture Preferences. Together, these settings apply to both the web conversion and web capture processes.*

General tab

File Type Settings Specifies the file type to be downloaded. If you select HTML or Plain Text as the file type, click Settings to select the font properties and other display characteristics.

Create Bookmarks Creates a tagged bookmark for each converted web page using the page's title (HTML Title element) as the bookmark name. If the page has no title, the URL is used as the bookmark name.

Create PDF Tags Stores a structure in the PDF that corresponds to the HTML structure of the web pages and lets you create tagged bookmarks for paragraphs, list elements, and other items that use HTML elements.

Place Headers & Footers On New Pages Places a header and footer on every page. Headers show the web page's title; footers show the page's URL, the page number in the downloaded set, and the date and time of the download.

Save Refresh Commands Saves a list of all URLs and remembers how they were downloaded in the PDF for refreshing (updating) purposes. Must be selected before you can update a PDF-converted website.

Page Layout tab

The upper portion of this tab shows options similar to those on a Page Setup or Print dialog box, specifying a selection of page sizes and options for width, height, margin measurements, and page orientation. The right side of the tab area shows a Sample Page that adjusts when you change the measurements or orientation options.

The Scaling portion of the tab area shows these options:

Scale Wide Contents To Fit Page (Windows)/Scale Contents To Fit Page (Mac OS) Rescales a page's contents, if necessary, to fit the width of the page. If this option is not selected, the paper size adjusts to fit the page's contents if necessary.

Switch To Landscape If Scaled Smaller Than Changes the page orientation to landscape if the new version of a page is less than 70% of the original size. Available only if you selected portrait orientation.

HTML Conversion Settings

This dialog box opens when you select HTML on the General tab of the Web Page Conversion Settings dialog box, and then click the Settings button.

General tab Lets you specify the following options:

- **Default Colors** Sets the default colors for text, page backgrounds, web links, and text that replace unavailable images. Click the color button to open a palette, and select the color. To use these colors on all pages, select Force These Settings For All Pages.
- **Background Options** Specifies whether to display colors and tiled images in page backgrounds and colors in table cells. If options are deselected, converted web pages may look different than they do in a web browser, but may be easier to read when printed.
- **Line Wrap** Wraps preformatted (HTML) lines of text. When selected, this option changes the line breaks so that the text fits on the PDF pages. Select this setting if an HTML file has unreasonably long lines of preformatted text.
- **Multimedia** Determines whether to reference multimedia (such as SWF files) by URL, disable multimedia capture, or embed multimedia files when possible.
- **Convert Images** Includes images in the conversion to PDF. If you do not select this option, an image is indicated by a colored border (and possibly text, if specified by the page's design).
- **Underline Links** Underlines textual web links on the pages.

Fonts And Encoding tab Lets you specify the following options:

- **Default** Under Input Encoding, sets the input encoding of a file's text from a menu of operating systems and alphabets.
- **Always** Ignores any encoding that is specified in the HTML source file and uses the selection shown in the Default option.
- **When Page Doesn't Specify Encoding** Uses the selection shown in the Default option only if the HTML source file does not specify a type of encoding.
- **Language Specific Font Settings** Use these settings to change the fonts used to display body text, headings, and preformatted text. Click Change, select new fonts from the menus, and click OK.
- **Font Size** Sets the font sizes used for body text, headings, and preformatted text.
- **Embed Platform Fonts When Possible** Stores the fonts used on the pages in the PDF so that the text always appears in the original fonts. Note that embedding fonts increases the size of the file.

Plain Text Conversion Settings

General tab Lets you specify the following options:

- **Color swatches** Swatches indicate the colors selected for text and background. Colors can be changed by clicking the swatch and selecting a new color in the color picker that opens.
- **Wrap Lines At Margin** Inserts a soft return when the text reaches the edge of the text area on the page.
- **Reflow Text** (Available only when Wrap Lines At Margin is selected.) Makes text more accessible for users with special needs.
- **Limit Lines Per Page** Sets the maximum number of lines that can appear on a single page, based on the entry in Max Lines.

Fonts And Encoding tab Lets you specify the following options:

- **Default** Under Input Encoding, sets the input encoding of a file's text.
- **Language Specific Font Settings** Use these settings to change the fonts used to display body text, headings, and preformatted text. Click Change, select new fonts from the menus, and click OK.
- **Font Size** Sets the font sizes used for body text, headings, and preformatted text.
- **Embed Platform Fonts When Possible** Stores the fonts used on the pages in the PDF so that the text always appears in the original fonts. Note that embedding fonts increases the size of the file.

Web Capture preferences in Acrobat

You can set several preferences for opening PDFs created from web pages and for customizing the process of converting web pages to PDFs. To open the Web Capture Preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and select Web Capture under Categories.

Note: *The options available in the Web Capture Preferences are different from those available in the Web Page Conversion Settings. Together, these settings apply to both the web conversion and web capture processes.*

Verify Stored Images Specifies how often to check whether images on the website have changed.

Show Bookmarks Panel When New PDF File (Created From Web Page) Is Opened When selected, automatically opens the navigation pane and displays tagged bookmarks when you open a new file. (When deselected, the navigation pane is closed when you open converted web pages, but the tagged bookmarks are still created. Click the Bookmarks button to see the tagged bookmarks in the navigation pane.)

Skip Downloading Secured Pages Select Always to skip secured pages when downloading multiple levels of a website. If you select After, a password dialog box appears that times out and skips the secured pages after the specified number of seconds.

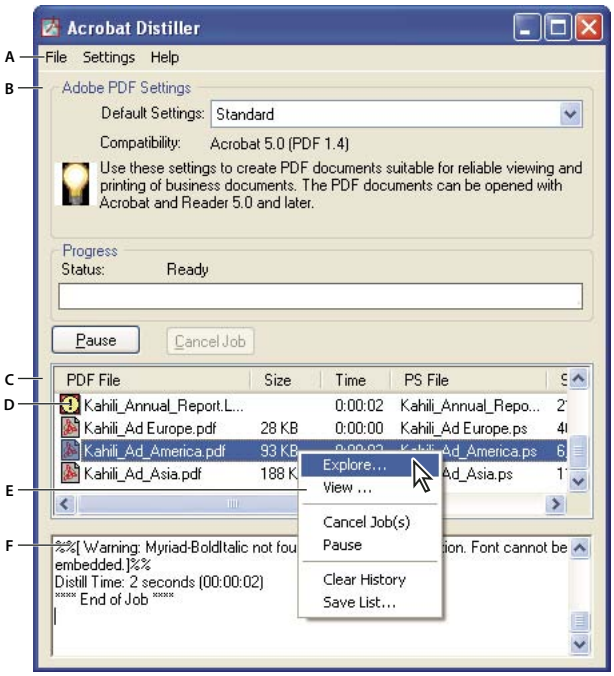
Reset Conversion Settings To Defaults Changes the options in the Web Page Conversion Settings dialog box back to the original settings.

Note: *If you select this option, the settings revert immediately and irreversibly. If you want to restore your custom conversion options, you must enter each of those settings again.*

Creating PDFs with Acrobat Distiller

Acrobat Distiller overview

In Acrobat Distiller, you can select settings used to convert documents to PDFs, security options, and font information. You also use the Acrobat Distiller window to monitor the jobs you've lined up for PDF conversion.



Acrobat Distiller main window (Windows)
A. *Menus* ***B.*** *Adobe PDF settings files* ***C.*** *Files in job queue* ***D.*** *Failed job* ***E.*** *Context menu* ***F.*** *Status window*

Note: *In Mac OS, there is no context menu. Instead, a Clear List button clears all distilled jobs from the list.*

To convert PostScript files automatically, set up a watched folder in Distiller.

Start Acrobat Distiller

❖ Do one of the following:

- In Acrobat, choose Advanced > Print Production > Acrobat Distiller.
- (Windows) Choose Start > Programs > Acrobat Distiller 8.0.
- (Mac OS) Use the Finder to locate Acrobat Distiller 8.0, and double-click it to open the Distiller application.

Manage the conversion queue

Distiller lets you queue PostScript files that you create in authoring applications and then monitor them throughout the PDF conversion process.

Queue a PostScript file

1 In Distiller, select an Adobe PDF settings file from the Default Settings pop-up menu.

2 (Optional) Choose Settings > Security and select an encryption level.

3 Open the PostScript file and start the conversion process, using either method:

- Choose File > Open, select a PostScript file, and click Open.
- Drag one or more PostScript files from the desktop to the Acrobat Distiller window.

Click Pause before doing step 3 if you want to review the queue before Distiller starts converting the files.

Change the queue during processing

Do any of the following:

- To temporarily stop processing the current job, click Pause. Or (Windows only), right-click the job queue and choose Pause.
- To resume processing the current job, click Resume. Or (Windows only), right-click the job queue and choose Resume.
- To delete files from the queue, click Cancel Job. Cancel Jobs deletes all files from the queue that are not yet successfully completed. Or (Windows only), select and right-click individual files in the job queue and choose Cancel Job(s) to delete only those files.
- (Windows only) To open the folder where the selected files are, right-click the job queue and choose Explore.
- (Windows only) To open the selected PDF in Acrobat, a browser, or Reader, right-click the job queue and choose View. Or, double-click the PDF to open it in Acrobat.

Save a history of the job queue (Windows)

❖ Right-click the job queue, and choose Save List.

Distiller saves and opens the history as a PDF.

Clear the queue

Remove all paused and successfully converted files from the list:

- (Windows) Right-click the job queue, and choose Clear History.
- (Mac OS) Click the Clear List button above the queue.

Distiller preferences

The Distiller preferences control global Distiller settings. You set Distiller preferences by choosing File > Preferences (Windows) or Distiller > Preferences (Mac OS).

Notify When Watched Folders Are Unavailable Returns a message if a watched folder becomes unavailable or can't be found.

(Windows) Notify When Windows TEMP Folder Is Nearly Full Warns you if available hard disk space is less than 1 MB. Required hard disk space is often double the size of the PostScript file being processed.

Ask For PDF File Destination Lets you specify the name and location for files when using drag-and-drop or the Print command.

Ask To Replace Existing PDF File Warns you if you are about to overwrite an existing PDF.

View PDF When Using Distiller Automatically opens the converted PDF.

Delete Log Files For Successful Jobs Creates a log file (named *messages.log*) only if there are messages from interpreting the PostScript file or if a PostScript error occurs. (Log files for failed jobs are always created.)

Guidelines for creating PostScript files

If you want to fine-tune the creation of the PDF with Distiller parameters or pdfmark operators, first create a PostScript file and then convert that file to PDF. For details, download the Adobe Acrobat 8 SDK or specific parts of it, such as the *pdfmark Reference Manual*, from various tabs on the Acrobat SDK documentation page (English only) on the Adobe website.

In authoring applications such as Adobe InDesign, use the Print command with the Adobe PDF printer to convert a file to PostScript. The Print dialog boxes can vary from application to application. For instructions on creating a PostScript file from your specific application, see the application's documentation.

Keep the following guidelines in mind when creating PostScript files:

- Use PostScript Language Level 3 whenever possible to take advantage of the most advanced features of PostScript.
- Use the Adobe PDF printer as your PostScript printer.
- (Windows) Send the fonts used in the document.
- Give a PostScript file the same name as the original document, but with the extension .ps. (Some applications use a .prn extension instead.)
- Use color and custom page sizes that are available with the Acrobat Distiller 8.0 PPD file. Other PPD files may cause inappropriate colors, fonts, or page sizes in the PDF.
- Send PostScript files as 8-bit binary data when using FTP to transfer the files between computers, especially if the platforms are different, to avoid converting line feeds to carriage returns or vice versa.

About watched folders

You can configure Distiller to look for PostScript files in certain folders called *watched folders*. Distiller can monitor up to 100 watched folders. When Distiller finds a PostScript file located in the In folder of a watched folder, it converts the file to PDF and then moves the PDF (and usually the PostScript file and any associated log file) to the Out folder. A watched folder can have its own Adobe PDF settings and security settings that apply to all files processed from that folder. Security settings for a watched folder take priority over the security settings for Distiller. For example, Distiller does not convert a PostScript file in a watched folder if the file is marked with read-only permission.

(Windows) Settings and preferences are unique to each user. On a non-NT File System (NTFS), custom settings files stored in this settings folder are read- and write-accessible by every user on the system. On an NTFS, only files created by respective users are read- and write-accessible. Settings files created by other users are read-only. (The default settings files installed with Adobe Acrobat Distiller are Read Only and Hidden.)

(Mac OS) Each user's settings and preferences for Distiller are normally not accessible to any other user. To share a watched folder with other users, the folder's creator must set the appropriate permissions for the In and Out folders. Sharing enables other users to copy files to the In folder and get files from the Out folder. The creator must be logged into the system and have Distiller running. The other users must log in remotely to access the live watched folder and have their files processed.

Important: *You can't set up watched folders as a network service for other users. Every user who creates PDFs must have either an Acrobat Professional or Acrobat 3D license.*

Set watched folders

1 In Acrobat Distiller, choose Settings > Watched Folders.

2 Click Add Folder, and select the target folder. Distiller automatically puts an In folder and an Out folder in the target folder. You can place In and Out folders at any level of a disk drive.

3 To define security options for a folder, select the folder and click Edit Security. Click OK to return to the Watched Folders dialog box.

Note: *A security icon is prepended to any folder name for which security is set. To return a folder to the original options selected in the Distiller window, select the folder, and click Clear Security.*

4 Set Adobe PDF conversion settings for the folders:

- To edit the Adobe PDF settings to be applied to a folder, select the folder, click Edit Settings, and edit the Adobe PDF settings. Click OK to save it to the watched folder as folder.joboptions.
- To use a different set of Adobe PDF settings, select the folder and click Load Settings. Use any settings that you have defined, named, and saved, and then click OK.

5 Set options to manage the processing of files:

- Enter a number of seconds to specify how often to check the folders. You can enter up to 9999. (For example, 120 equals 2 minutes, and 9999 equals about 2-3/4 hours.)
- Choose what to do with a PostScript file after it has been processed. The file can be moved to the Out folder along with the PDF file or deleted. Any log file is also automatically copied to the Out folder.
- To delete PDFs after a certain period of time, enter a number of days, up to 999. This option also deletes PostScript and log files, if you have chosen to delete them.

6 If you want to remove a folder, select the folder and click Remove Folder. Make sure that Distiller has finished processing all the files in the folder before you remove it.

Note: *When you remove a watched folder, Distiller does not delete the In and Out folders, their contents, or the folder.joboptions file. You can delete these manually when appropriate.*

See also

"Customize Adobe PDF settings" on page 101

Adobe PDF conversion settings

Choose an Adobe PDF preset for converting files

1 Do one of the following:

- Start Acrobat Distiller 8.0.
- In an Adobe Creative Suite application, choose File > Print, select Adobe PDF as the target printer, and click Properties.
- (Windows) In Office 2007 applications, choose Acrobat > Preferences.
- (Windows) In another authoring application or utility, choose Adobe PDF > Change Conversion Settings.

2 Choose a preset from the Default Settings (or Conversion Settings) menu.

Note: *All settings create PDFs that can be opened in Acrobat 5.0 and later, and Acrobat Reader 5.0 and later, unless otherwise described.*

Adobe PDF presets

A PDF *preset* is a group of settings that affect the process of creating a PDF. These settings are designed to balance file size with quality, depending on how the PDF will be used. Most predefined presets are shared across Adobe Creative Suite applications, including InDesign, Illustrator, Photoshop, and Acrobat. You can also create and share custom presets for your unique output requirements.

A few of the presets listed below are not available until you move them—as needed—from the Extras folder (where they installed by default) to the Settings folder for custom settings.

Typically, the Extras and Settings folders for default settings are found in (Windows) Documents and Settings/All Users/Application Data/Adobe/Adobe PDF, (Vista) ProgramData/Adobe/Adobe PDF, or (Mac OS) Library/Application Support/Adobe PDF. The default settings files installed with Distiller are Read Only and Hidden.

The custom settings are found in (Windows) Documents and Settings/*[username]*/Application Data/Adobe/Adobe PDF/Settings, (Vista) Users/*[username]*/AppData/Roaming/Adobe/Adobe PDF/Settings, or (Mac OS) Users/*[username]*/Library/Application Support/Adobe/Adobe PDF/Settings.

Some presets are not available in some Creative Suite applications.

Review your PDF settings periodically. The settings do not automatically revert to the default settings. Applications and utilities that create PDFs use the last set of PDF settings defined or selected.

High Quality Print Creates PDFs for quality printing on desktop printers and proofing devices. This preset uses PDF 1.4, downsamples color and grayscale images to 300 ppi and monochrome images to 1200 ppi, embeds subsets of all fonts, leaves color unchanged, and does not flatten transparency (for file types capable of transparency). These PDFs can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later. In InDesign, this preset also creates tagged PDFs.

Illustrator Default (Illustrator only) Creates a PDF in which all Illustrator data is preserved. PDFs created with this preset can be reopened in Illustrator without any loss of data.

Oversized Pages (Acrobat only) Creates PDFs suitable for viewing and printing of engineering drawings larger than 200 x 200 inches (508 x 508 cm). These PDFs can be opened in Acrobat and Reader 7.0 and later.

PDF/A-1b: 2005 (CMYK and RGB) (Acrobat only) Used for long-term preservation (archival) of electronic documents. PDF/A-1b uses PDF 1.4 and converts all colors to either CMYK or RGB, depending on which standard you choose. These PDFs can be opened in Acrobat and Reader versions 5.0 and later.

PDF/X-1a (2001 and 2003) PDF/X-1a requires all fonts to be embedded, the appropriate PDF bounding boxes to be specified, and color to appear as CMYK, spot colors, or both. Compliant files must contain information describing the printing condition for which they are prepared. PDF files created with PDF/X-1a compliance can be opened in Acrobat 4.0 and Acrobat Reader 4.0 and later.

PDF/X-1a uses PDF 1.3, downsamples color and grayscale images to 300 ppi and monochrome images to 1200 ppi, embeds subsets of all fonts, creates untagged PDFs, and flattens transparency using the High Resolution setting.

Note: *The PDF/X1-a:2003 and PDF/X-3 (2003) presets are placed on your computer during installation but aren't available until you move them from the Extras folder to the Settings folder.*

PDF/X-4 (2007) In Acrobat 8, this preset is called PDF/X-4 DRAFT to reflect the draft state of the ISO specification at Acrobat ship time. This preset is based on PDF 1.4, which includes support for live transparency. PDF/X-4 has the same color-management and International Color Consortium (ICC) color specifications as PDF/X-3. You can create PDF/X-4-compliant files directly with Creative Suite 3 applications (Illustrator, InDesign, and Photoshop). In Acrobat 8, use the Preflight feature to convert PDFs to PDF/X-4 DRAFT.

PDF files created with PDF/X-4 compliance can be opened in Acrobat 7.0 and Reader 7.0 and later.

Press Quality Creates PDF files for high-quality print production (for example, for digital printing or for separations to an imagesetter or platesetter), but does not create files that are PDF/X-compliant. In this case, the quality of the content is the highest consideration. The objective is to maintain all the information in a PDF file that a commercial printer or print service provider needs in order to print the document correctly. This set of options uses PDF 1.4, converts colors to CMYK, downsamples color and grayscale images to 300 ppi and monochrome images to 1200 ppi, embeds subsets of all fonts, and preserves transparency (for file types capable of transparency).

These PDF files can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later.

Note: *Before creating an Adobe PDF file to send to a commercial printer or print service provider, find out what the output resolution and other settings should be, or ask for a .joboptions file with the recommended settings. You might need to customize the Adobe PDF settings for a particular provider and then provide a .joboptions file of your own.*

Rich Content PDF Creates accessible PDF files that include tags, hyperlinks, bookmarks, interactive elements, and layers. This set of options uses PDF 1.5 and embeds subsets of all fonts. It also optimizes files for byte serving. These PDF files can be opened in Acrobat 6.0 and Adobe Reader 6.0 and later. (The Rich Content PDF preset is in the Extras folder.)

Note: *This preset was called eBook in earlier versions of some applications.*

Smallest File Size Creates PDF files for displaying on the web or an intranet, or for distribution through an email system. This set of options uses compression, downsampling, and a relatively low image resolution. It converts all colors to sRGB, and (for Adobe Acrobat Distiller-based conversions) does not embed fonts. It also optimizes files for byte serving.

These PDF files can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later.

Standard (Acrobat only) Creates PDF files to be printed to desktop printers or digital copiers, published on a CD, or sent to a client as a publishing proof. This set of options uses compression and downsampling to keep the file size down, but also embeds subsets of all (allowed) fonts used in the file, converts all colors to sRGB, and prints to a medium resolution. Note that Windows font subsets are not embedded by default. PDF files created with this settings file can be opened in Acrobat 5.0 and Acrobat Reader 5.0 and later.



For more information about shared PDF settings for Adobe Creative Suite applications, see the PDF Integration Guide on the Creative Suite CD.

Customize Adobe PDF settings

You may want to create custom conversion settings for certain jobs or output devices. The selections you make determine such things as whether the document fonts are embedded and subsetted at 100%, how vector objects and images are compressed and/or sampled, and whether the resulting PDF includes high-end printing information such as OPI (Open Prepress Interface) comments. Default settings files cannot be modified, but can be duplicated to help create new settings files.

Note: *If the PDF is intended for high-end printing, ask your service provider for their custom .joboptions file with the recommended output resolution and other settings. This way, the PDF you give them will have characteristics optimized for your print workflow.*

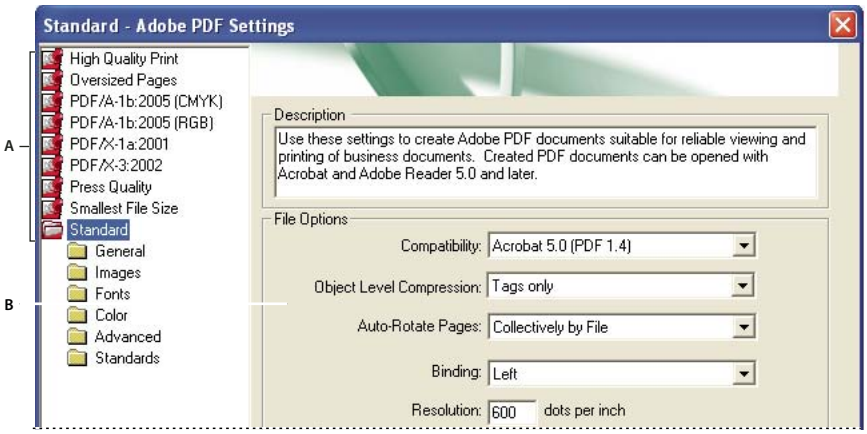
Create a custom Adobe PDF settings file

1 Do one of the following:

- In Acrobat Distiller, select one of the predefined sets of options from the Default Settings menu to use as a starting point, and then choose Settings > Edit Adobe PDF Settings.

- In authoring applications or utilities, select Adobe PDF as the target printer—typically in the Page Setup or Print dialog boxes—and click Properties.
- (Windows) In the Acrobat PDFMaker dialog box, click Advanced Settings in the Settings tab.

Note: *In Windows, you can switch to a different preset from within the Adobe PDF Settings dialog box. To do this, select Show All Settings at the bottom left and then select a preset from the list on the left.*



Adobe PDF Settings dialog box (Windows)
A. *Predefined Adobe PDF settings* ***B.*** *Options panel*

2 Select panels one at a time, using the folder icons in the list (Windows) or the tab buttons across the top of the dialog box (Mac OS), and make the changes that you want to apply.

3 Save your customized preset in one of the following ways:

- Click OK to save a duplicate of the custom preset file, which will automatically be renamed. For example, if you edit the Press Quality preset, your first customized version appears as Press Quality (1).
- Click Save As, type a new descriptive name for the file, and click Save.

The custom file is saved in (Windows) /Documents and Settings/*[user name]*/Application Data/Adobe/Adobe PDF/Settings, (Vista) User/*[user name]*/AppData/Roaming/Adobe/Adobe PDF/Settings, or (Mac OS) Users/*[user name]*/Library/Application Support/Adobe/PDF/Settings

Delete custom Adobe PDF settings files

1 In Acrobat Distiller, choose Settings > Remove Adobe PDF Settings.

2 Select a custom file that you want to delete, and click Remove.

3 Repeat step 2 as needed, and then click Cancel to close the Remove Adobe PDF Settings dialog box.

Adobe PDF settings

The Adobe PDF Settings dialog box in Acrobat Distiller contains panels of options that you can select to customize your PDF output.

See also

"PDF/X- and PDF/A-compliant files" on page 497

"Find PostScript font names" on page 115

General panel options

Use this panel to select a version of Acrobat for file compatibility and other file and device settings. (The panel appearance differs in Windows and Mac OS.)

Compatibility Sets the compatibility level of the PDF. Use the most recent version (in this case, version 1.7) to include all the latest features and functionality. If you're creating PDFs that will be distributed widely, choose an earlier level, to ensure that all users can view and print the document.

Object Level Compression Compresses structural information (such as bookmarks, accessibility, and noncompressible objects), making this information neither visible or usable in Acrobat 5.0 or Reader 5.0. Tags Only compresses structural information; Off applies no compression.

Auto-Rotate Pages Automatically rotates pages according to the direction of text.

- **Collectively By File** Rotates all pages to match the orientation of the majority of text in the document.
- **Individually** Rotates each page based on the orientation of the text on that page.
- **Off** Prevents pages from rotating.

Note: *If Process DSC Comments is selected in the Advanced panel and if %%Viewing Orientation comments are included, these comments take precedence in determining page orientation.*

Binding Specifies whether to display a PDF with left-side or right-side binding. The Binding setting affects the display of pages in the Two-Up Continuous view and the display of thumbnails side by side.

Resolution Use for PostScript files to emulate resolutions based on the printer they are printing to. Permitted values range from 72 to 4000. Use the default setting unless you plan to print the PDF on a specific printer while emulating the resolution defined in the original PostScript file.

Note: *Increasing the resolution setting increases file size and may slightly increase the time required to process some files.*

Pages Specifies which pages to convert to PDF.

Embed Thumbnails Embeds a thumbnail preview for each page in the PDF, increasing the file size. Deselect this setting when users of Acrobat 5.0 and later will view and print the PDF; these versions generate thumbnails dynamically each time you click the Pages panel of a PDF.

Optimize For Fast Web View Restructures the file for faster access (page-at-a-time downloading, or byte serving) from web servers. This option compresses text and line art, overriding compression selections on the Images panel.

Default Page Size Specifies the page size to use when one is not specified in the original file. EPS files give a bounding box size, not a page size.

Images panel options

The options in the Images panel specify compression and resampling for color, grayscale, and monochrome images. You may want to experiment with these options to find an appropriate balance between file size and image quality.

The resolution setting for color and grayscale images should be 1.5 to 2 times the line screen ruling at which the file will be printed. The resolution for monochrome images should be the same as the output device, but be aware that saving a monochrome image at a resolution higher than 1500 dpi increases the file size without noticeably improving image quality. Images that will be magnified, such as maps, may require higher resolutions.

Note: *Resampling monochrome images can have unexpected viewing results, such as no image display. If this happens, turn off resampling and convert the file again. This problem is most likely to occur with subsampling, and least likely with bicubic downsampling.*

The following table shows common types of printers and their resolution measured in dpi, their default screen ruling measured in lines per inch (lpi), and a resampling resolution for images measured in pixels per inch (ppi). For example, if you were printing to a 600-dpi laser printer, you would enter 170 for the resolution at which to resample images.

Printer resolution	Default line screen	Image resolution
300 dpi (laser printer)	60 lpi	120 ppi
600 dpi (laser printer)	85 lpi	170 ppi
1200 dpi (image-setter)	120 lpi	240 ppi
2400 dpi (image-setter)	150 lpi	300 ppi

Downsample (Off) Reduces image resolutions that exceed the For Images Above value to the resolution of the output device by combining pixels in a sample area of the image to make one larger pixel.

Average Downsampling To Averages the pixels in a sample area and replaces the entire area with the average pixel color at the specified resolution.

Subsampling To Replaces an entire area with a pixel selected from that sample area, at the specified resolution. Causes faster conversion time than downsampling, but resulting images are less smooth and continuous.

Bicubic Downsampling To Uses a weighted average, instead of a simple average (as in downsampling) to determine pixel color. This method is slowest but produces the smoothest tonal gradations.

Compression/Image Quality Applies compression to color, grayscale, and monochrome images. For color and grayscale images, also sets the image quality.

Anti-Alias To Gray Smooths jagged edges in monochrome images. Choose 2 bit, 4 bit, or 8 bit to specify 4, 16, or 256 levels of gray. (Anti-aliasing may cause small type or thin lines to look blurry.)

Note: *Compression of text and line art is always on. If you need to turn it off, you can do so by setting the appropriate Distiller parameter. For details, see the documentation available for download on the Acrobat SDK documentation page (English only) on the Adobe website.*

Policy Opens the Image Policy dialog box, where you can set processing options for Color, Grayscale, and Monochrome images that are less than the resolutions you specify. For each type of image, enter a resolution value, and then choose Ignore, Warn And Continue, or Cancel Job.

Fonts panel options

The Fonts options specify which fonts to embed in a PDF, and whether to embed a subset of characters used in the PDF. You can embed OpenType®, TrueType, and Type 1 fonts. Fonts that have license restrictions are preceded by a lock icon . If you select a font that has a license restriction, the nature of the restriction is described in the explanation area of the Adobe PDF Options dialog box.

Note: *When you combine PDF files that have the same font subset, Acrobat attempts to combine the font subsets.*

Embed All Fonts Embeds all fonts used in the file. Font embedding is required for PDF/X compliance.

Embed OpenType Fonts Embeds all OpenType fonts used in the file, and maintains OpenType font information for advanced line layout. This option is available only if either Acrobat 7 (PDF 1.6) or Acrobat 8 (PDF 1.7) is selected from the Compatibility menu in the General panel.

Subset Embedded Fonts When Percent Of Characters Used Is Less Than Specifies a threshold percentage if you want to embed only a subset of the fonts. For example, if the threshold is 35, and less than 35% of the characters are used, Distiller embeds only those characters.

When Embedding Fails Specifies how Distiller should respond if it cannot find a font to embed when processing a file.

Always Embed To embed only certain fonts, move them into the Always Embed list. Make sure that Embed All Fonts is not selected.

Never Embed Move fonts that you do not want to embed to this list. If necessary, choose a different font folder from the pop-up menu to display the font in the font list.

Note: *Fonts that have license restrictions are preceded by a lock icon. If you select a font with a license restriction, the nature of the restriction is described in the explanation area of the Adobe PDF Options dialog box.*

Add Name If the font you want is not in a font folder, click Add Name, enter the name of the font, select Always Embed List (or Never Embed List), and click Add.

Note: *A TrueType font can contain a setting added by the font's designer that prevents the font from being embedded in PDF files.*

Remove Removes a font from the Always Embed or Never Embed list. The font isn't removed from your system; the reference to it is removed from the list.

Note: *Acrobat 8 does not include the Times, Helvetica, and ZapfDingbats fonts that have been included in Acrobat 5.0 and earlier. If you want these fonts to be viewed and printed in PDFs that you create, embed the fonts.*

Color panel options

Whether you're using color management information in the PostScript file, using Distiller CSFs, or defining custom settings, you set all color management information for Distiller on the Color panel of the Adobe PDF Settings dialog box.

Settings File Lists color settings, including those used in graphics applications. The None setting lets you edit the Color Management Policies and Working Spaces settings.

Color Management Policies Specifies how Distiller converts unmanaged color in a PostScript file when you don't use a Distiller color settings file. This menu is available when None is selected in the Settings File menu.

Note: *Color Management Policies values may affect a PDF differently depending on the compatibility setting you choose in the General panel.*

- **Leave Color Unchanged** Leaves device-dependent colors unchanged and preserves device-independent colors as the nearest possible equivalent. This is a useful option for print shops that have calibrated their devices, have used that information to specify color in the file, and are only outputting to those devices.

- **Tag (Or Convert) Everything For Color Management** Tags color objects with an ICC profile and calibrates colors, making them device-independent in PDFs compatible with Acrobat 4.0 (PDF 1.3) and later. Converts device-dependent color spaces in images (RGB, Grayscale, and CMYK) to device-independent color spaces (CalRGB, CalGray, and Cie L*a*b) in Acrobat 3.0 (PDF 1.2) compatible PDFs.

- **Tag (Or Convert) Only Images For Color Management** Tags ICC profiles in images only (not text or vector objects), which prevents black text from undergoing any color shift when distilling Acrobat 4.0 (PDF 1.3) compatible PDFs. Converts device-dependent color spaces in images (RGB, Grayscale, and CMYK) to device-independent color spaces (CalRGB, CalGray, and Lab) in Acrobat 3.0 (PDF 1.2) compatible PDFs.

- **Convert All Colors To sRGB (or Convert Everything To CalRGB)** Calibrates color, making it device-independent. Converts CMYK and RGB images to sRGB in PDFs compatible with Acrobat 4.0 (PDF 1.3) or later. Converts CMYK

and RGB images to calibrated RGB (CalRGB) in Acrobat 3.0 (PDF 1.2) compatible PDFs. Recommended for PDFs that will be used on-screen or with low-resolution printers.

• **Convert All Colors To CMYK** Converts color spaces to DeviceGray or DeviceCMYK according to the options specified in the Working Spaces menu. All Working Spaces must be specified.

Document Rendering Intent Choose a method to map colors between color spaces. The result of any particular method depends on the profiles of the color spaces. For example, some profiles produce identical results with different methods.

Acrobat shares four rendering intents (Perceptual, Saturation, Relative Colorimetric, and Absolute Colorimetric) with other Creative Suite applications. For descriptions of these rendering intents, see "About rendering intents" on page 423.

Acrobat also includes a rendering intent called Preserve, which indicates that the intent is specified in the output device rather than in the PDF. In many output devices, Relative Colorimetric is the default intent.

Note: *In all cases, intents may be ignored or overridden by color management operations that occur subsequent to the creation of the PDF file.*

Working Spaces For all Color Management Policies values other than Leave Color Unchanged, choose a working space to specify which ICC profiles are used for defining and calibrating the grayscale, RGB, and CMYK color spaces in distilled PDFs. For more information on working spaces, see "About color working spaces" on page 419.

• **Gray** Choose a profile to define the color space of all grayscale images in files. The default ICC profile for gray images is Adobe Gray - 20% Dot Gain. Choose None to prevent grayscale images from being converted.

• **RGB** Choose a profile to define the color space of all RGB images in files. The default, sRGB IEC61966-2.1, is recognized by many output devices. Choose None to prevent RGB images from being converted.

• **CMYK** Choose a profile to define the color space of all CMYK images in files. The default is U.S. Web Coated (SWOP) v2. Choose None to prevent CMYK images from being converted.

Note: *Choosing None for all three working spaces has the same effect as selecting the option Leave Color Unchanged.*



You can add ICC profiles (such as ones provided by your print service bureau) by placing them in the ICCProfiles folder in the Common folder, the Windows\System\Color folder (Windows), or the System Folder/ColorSync folder (Mac OS).

Preserve CMYK Values For Calibrated CMYK Color Spaces When selected, device-independent CMYK values are treated as device-dependent (DeviceCMYK) values, device-independent color spaces are discarded, and PDF/X-1a files use the Convert All Colors To CMYK value. When deselected, device-independent color spaces convert to CMYK, provided that Color Management Policies is set to Convert All Colors To CMYK.

Preserve Under Color Removal And Black Generation Retains these settings if they exist in the PostScript file. Black generation calculates the amount of black to use when reproducing a color. Undercolor removal (UCR) reduces cyan, magenta, and yellow to compensate for black generation. Because UCR uses less ink, it's suitable for uncoated stock.

When Transfer Functions Are Found Specifies how to handle transfer functions in PDFs. Transfer functions are used for artistic effect and to correct for the characteristics of a specific output device.

• **Remove** Deletes any applied transfer functions. Applied transfer functions should be removed, unless the PDF is to be output to the same device that the source PostScript file was created for.

• **Preserve** Retains the transfer functions traditionally used to compensate for dot gain or dot loss that may occur when an image is transferred to film. Dot gain or loss occurs when the ink dots that make up a printed image are larger or smaller than in the halftone screen.

• **Apply** Applies the transfer function, changing the colors in the file but doesn't keep it. This method is useful for creating color effects in a file.

Preserve Halftone Information Retains any halftone information in files. Halftone information is intended for use with a particular output device.

Advanced panel options

The Advanced options specify which Document Structuring Conventions (DSC) comments to keep in a PDF and how to set other options that affect the conversion from PostScript. In a PostScript file, DSC comments contain information about the file (such as the originating application, the creation date, and the page orientation) and provide structure for page descriptions in the file (such as beginning and ending statements for a prologue section). DSC comments can be useful when your document is going to print or press.

When you work with the Advanced options, it is helpful to have an understanding of the PostScript language and how it is translated to PDF. See *PostScript Language Reference, Third Edition* (Addison-Wesley) and *PDF Reference Fifth Edition: Adobe Portable Document Format Version 1.6* on the PDF reference page (English only) on the Adobe website. The same website has more detailed descriptions of the Advanced options and their parameters.

Note: *The ASCII Format option has been removed from Distiller, but is still available as a Distiller parameter.*

Allow PostScript File To Override Adobe PDF Settings Uses settings stored in a PostScript file rather than the current PDF settings file. For details, see the documentation available for download on the Acrobat SDK documentation page (English only) of the Adobe website.

Allow PostScript XObjects PostScript XObjects store fragments of PostScript code to be used when a PDF is printed on a PostScript printer. Use only in controlled workflows where there is no other option. Available when the Standard or Smallest File Size is selected from the Default Settings menu.

Convert Gradients To Smooth Shades Converts blends to smooth shades for Acrobat 4.0 and later, improving quality and reducing file size of PDFs. Distiller converts gradients from Adobe Illustrator, Adobe InDesign, Adobe FreeHand, CorelDraw, QuarkXPress, and Microsoft PowerPoint.

Convert Smooth Lines To Curves Reduces the amount of control points used to build curves in CAD drawings, which results in smaller PDFs and faster on-screen rendering.

Preserve Level 2 Copypage Semantics Uses the copypage operator defined in PostScript Level 2 rather than in Language Level 3 PostScript. If you have a PostScript file and select this option, a copypage operator copies the page. If this option is not selected, the equivalent of a showpage operation is executed, except that the graphics state is not reinitialized.

Preserve Overprint Settings Retains any overprint settings in files being converted to PDF. Overprint settings create color by printing one ink on top of another ink.

Overprinting Default Is Nonzero Overprinting Prevents overprinted objects with zero CMYK values from knocking out CMYK objects beneath them.

Save Adobe PDF Settings Inside PDF File Embeds the settings file (.joboptions) used to create the PDF as an attachment. (To view the settings file, choose View > Navigation Panels > Attachments in Acrobat.)

Save Original JPEG Image In PDF If Possible Processes compressed JPEG images (images that are already compressed using DCT encoding) without recompressing them. When deselected, performance improves because only decompression, not recompression, occurs.

Save Portable Job Ticket Inside PDF File Preserves a PostScript job ticket in a PDF. Job tickets describe the PostScript file and can be used later in a workflow or for printing the PDF.

Use Prologue.ps and Epilogue.ps Sends a prologue and epilogue file with each job. These files can be used to add custom PostScript code that you want to have executed at the beginning or end of every PostScript job being converted.

Sample Prologue.ps and Epilogue.ps files are located in (Windows) /Documents and Settings/All Users/Application Data/Adobe/Adobe PDF/Distiller/Data, (Vista) /Users/All Users/Adobe/Adobe PDF/Distiller/Data, or (Mac OS)/Library/Application Support/Adobe/Adobe PDF/Distiller/Data.

In Windows Explorer, the Application Data folder is typically hidden; to make it visible, choose Tools > Folder Options, click the View tab, and select Show Hidden Files And Folders. Or, you can type the path into the Address text box.

Note: *Distiller processes prologue and epilogue files only if both files are present and located properly. The two files must be used together. If the prologue and epilogue files are at the same level as the In and Out folders of a watched folder, they are used instead of the ones in the Distiller folder.*

Process DSC Comments Maintains DSC information from a PostScript file.

- **Log DSC Warnings** Displays warning messages about problematic DSC comments during processing and adds them to a log file.
- **Preserve EPS Information From DSC** Retains information for an EPS file, such as the originating application and creation date.
- **Preserve OPI Comments** Retains information needed to replace a For Placement Only (FPO) image or comment with the high-resolution image located on servers that support Open Prepress Interface (OPI) versions 1.3 and 2.0. For more information, see the OPI 2.0 specification (English only) on the Adobe website.
- **Preserve Document Information From DSC** Retains document properties, such as the title, creation date, and time, in the PDF.
- **Resize Page And Center Artwork For EPS Files** Centers an EPS image and resizes the page to fit closely around the image. If deselected, the page is sized and centered based on the upper left corner of the upper left object and lower right corner of the lower right object on the page. This option applies only to jobs that consist of a single EPS file.

Standards panel options

By using Standards options, you can check document content in the PostScript file to make sure it meets standard PDF/X1-a, PDF/X-3, or PDF/A criteria before creating the PDF. For PDF/X-compliant files, you can also require that the PostScript file meet additional criteria by selecting options in the Standards panel. The availability of options depends on the standard you select. You can also create a PDF/X file from a compliant PDF by using the Preflight feature in Acrobat.

PDF/X-compliant Complies with the PDF/X standard for high-resolution print production.

Note: *PDFMaker, the conversion method used to convert Microsoft Word and other application files to PDF, does not create PDF/X-compliant files.*

PDF/A-compliant Complies with the PDF/A standard for archival documents.

Note: *If you set up a watched folder for creating PDF/A-compliant files, be sure that you do not add security to the folder; the PDF/A standard does not allow encryption.*

Compliance Standard Produces a report that indicates whether the file complies with the standard you select, and if not, what problems were encountered. The .log file appears at the bottom of the dialog box.

Note: *PDFs that complied with both PDF/X-1a and PDF/X-3 standards in Acrobat 6.0 will default to PDF/X-1a in Acrobat 8.*

When Not Compliant Specifies whether to create the PDF if the PostScript file does not comply with the standard's requirements.

- **Continue** Creates a PDF even if the PostScript file doesn't meet the PDF/X requirements and notes these problems in the report.
- **Cancel Job** Creates a PDF only if the PostScript file meets the PDF/X requirements of the selected report options, and is otherwise valid.

Report As Error Flags the PostScript file as noncompliant if one of the reporting options is selected and a trim box or art box is missing from any page.

Set TrimBox To MediaBox With Offsets (Points) Computes values for the trim box based on the offsets for the media box of respective pages if neither the trim box nor art box is specified. The trim box is always as small as or smaller than the enclosing media box.

Set BleedBox To MediaBox Uses the media box values for the bleed box if the bleed box is not specified.

Set BleedBox To TrimBox With Offsets (Points) Computes values for the bleed box based on the offsets for the trim box of respective pages if the bleed box is not specified. The bleed box is always as large as or larger than the enclosed trim box. This option uses the units specified on the General panel of the Adobe PDF Settings dialog box.

Output Intent Profile Name Indicates the characterized printing condition for which the document has been prepared, and is required for PDF/X compliance. If a document doesn't specify an output intent profile name, Distiller uses the selected value from this menu. If your workflow requires that the document specify the output intent, choose None.

Output Condition Identifier Indicates the reference name that is specified by the registry of the output intent profile name. For more information, click the question mark next to the option.

Output Condition Describes the intended printing condition. This entry can be useful for the intended receiver of the PDF. For more information, click the question mark next to the option.

Registry Name (URL) Indicates the web address for finding more information about the output intent profile. The URL is automatically entered for ICC registry names. The registry name is optional, but recommended. For more information, click the question mark next to the option.

Trapped Indicates the state of trapping in the document. PDF/X compliance requires a value of True or False. If the document does not specify the trapped state, the value provided here is used. If your workflow requires that the document specify the trapped state, choose Leave Undefined.

PDF compatibility levels

When you create PDFs, you need to decide which PDF version to use. You can change the PDF version by switching to a different preset or choosing a compatibility option when you save as PDF or edit a PDF preset.

Generally speaking, unless there's a specific need for backward compatibility, you should use the most recent version (in this case, version 1.7). The latest version will include all the newest features and functionality. However, if you're creating documents that will be distributed widely, consider choosing Acrobat 5 (PDF 1.4) or Acrobat 6 (PDF 1.5) to ensure that all users can view and print the document.

The following table compares some of the functionality in PDFs created using the different compatibility settings.

Acrobat 4.0 (PDF 1.3)	Acrobat 5.0 (PDF 1.4)	Acrobat 6.0 (PDF 1.5)	Acrobat 7.0 (PDF 1.6) and Acrobat 8 (PDF 1.7)
PDFs can be opened with Acrobat 3.0 and Acrobat Reader 3.0 and later.	PDFs can be opened with Acrobat 3.0 and Acrobat Reader 3.0 and later. However, features specific to later versions may be lost or not viewable.	Most PDFs can be opened with Acrobat 4.0 and Acrobat Reader 4.0 and later. However, features specific to later versions may be lost or not viewable.	Most PDFs can be opened with Acrobat 4.0 and Acrobat Reader 4.0 and later. However, features specific to later versions may be lost or not viewable.
Cannot contain artwork that uses live transparency effects. Any transparency must be flattened prior to converting to PDF 1.3.	Supports the use of live transparency in artwork. (The Acrobat Distiller feature flattens transparency.)	Supports the use of live transparency in artwork. (The Acrobat Distiller feature flattens transparency.)	Supports the use of live transparency in artwork. (The Acrobat Distiller feature flattens transparency.)
Layers are not supported.	Layers are not supported.	Preserves layers when creating PDFs from applications that support the generation of layered PDF documents, such as Illustrator CS and later or InDesign CS and later.	Preserves layers when creating PDFs from applications that support the generation of layered PDF documents, such as Illustrator CS and later or InDesign CS and later.
DeviceN color space with 8 colorants is supported.	DeviceN color space with 8 colorants is supported.	DeviceN color space with up to 31 colorants is supported.	DeviceN color space with up to 31 colorants is supported.
Multibyte fonts can be embedded. (Distiller converts the fonts when embedding.)	Multibyte fonts can be embedded.	Multibyte fonts can be embedded.	Multibyte fonts can be embedded.
40-bit RC4 security supported.	128-bit RC4 security supported.	128-bit RC4 security supported.	128-bit RC4 and 128-bit AES (Advanced Encryption Standard) security supported.

Share custom PDF settings

You can save and reuse your own Adobe PDF preset definitions. You can also share a custom preset by sending a copy of the resulting file to other users, who can then add it to the Distiller applications installed on their own computers.

Note: *PDF settings files have the extension .joboptions. Custom preset files are stored in (Windows) Documents and Settings/[username]/Application Data/Adobe/Adobe PDF/Settings or (Mac OS) User/[username]/Library/Application Support/Adobe/Adobe PDF/Settings.*

❖ To add a custom PDF settings file to the menu, do one of the following:

- Drag the .joboptions file onto the Distiller window.
- In Acrobat Distiller, choose Settings > Add Adobe PDF Settings, browse to the copied .joboptions file, select it, and click Open.

The settings file appears as the selected option in the Default Settings menu.

Compressing and downsampling images

When converting PostScript files to PDF, you can compress vector objects (such as text and line art) and compress and downsample images. Line art is described with a mathematical equation and is usually created with a drawing program such as Adobe Illustrator. Images—whether color, monochrome, or grayscale—are described as pixels and are created with applications like Adobe Photoshop or by scanning. Monochrome images include most black-and-white illustrations made by paint programs and any images scanned with an image depth of 1 bit.

When you downsample (or decrease the number of pixels), information is deleted from the image. With Distiller, you specify an *interpolation* method—average downsampling, bicubic downsampling, or subsampling—to determine how pixels are deleted. Depending on the settings you choose, compression and downsampling can significantly reduce the size of a PDF with little or no loss of detail and precision.

When Distiller processes a file, it normally applies the compression settings to images throughout the file. However, you can assign different compression and downsampling methods to individual images.

Varying the compression and downsampling methods within a PDF

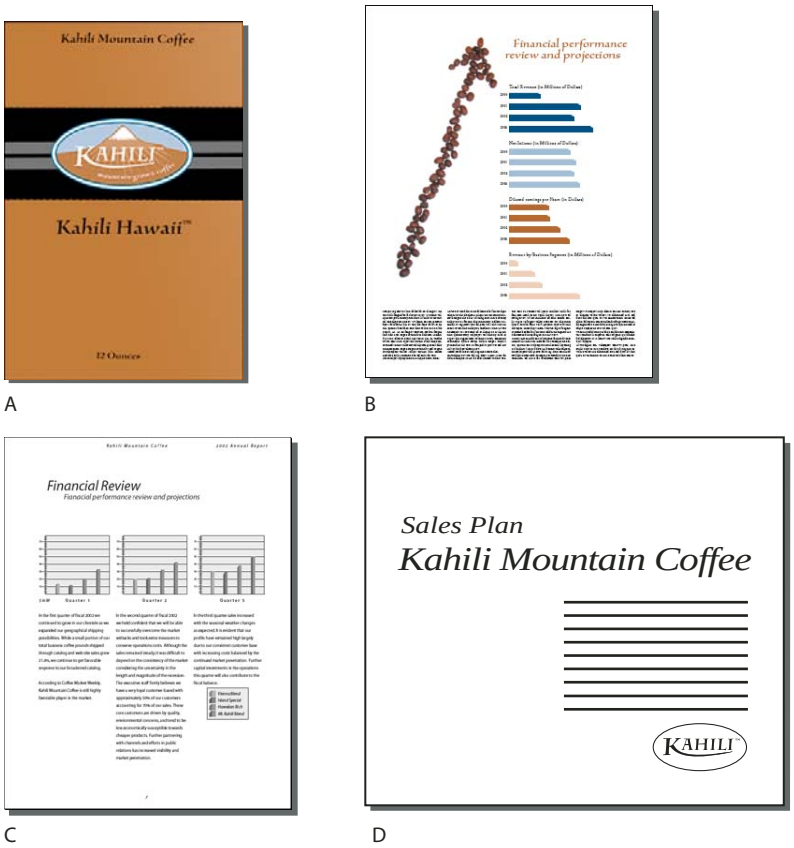
Before you create a PDF, you can take various approaches to applying different compression and downsampling options to the individual images that will go into that PDF:

- Use Adobe Photoshop to resample and compress existing image files before using Distiller. When you are ready to create the PDF in Distiller, be careful to deselect the compression and downsampling or subsampling options.
- Create separate PostScript files for each part of the document that you want to process differently, and use different compression options to distill each part. Then use Distiller to merge the files into a single PDF.
- When you create color, grayscale, and monochrome images in an art application (such as Adobe Photoshop), select the compression and downsampling settings that you want when you save each image from within that application.
- Insert Distiller parameters before images in a PostScript file. You can use this technique to process every image in a document differently. This technique is the most difficult, because it requires knowledge of PostScript programming. For more information on using parameters, see the documentation available for download on the Acrobat SDK documentation page (English only) of the Adobe website.

Note: *To apply the inserted Distiller parameters, select Allow PostScript File To Override Adobe PDF Settings on the Advanced panel of the Adobe PDF Settings dialog box in Distiller. This option overrides settings you selected in the Adobe PDF dialog box.*

Compression methods

Distiller applies ZIP compression to text and line art, ZIP or JPEG compression to color and grayscale images, and ZIP, CCITT Group 3 or 4, or Run Length compression to monochrome images.



Suitable compression methods for different art types
***A.** ZIP **B.** JPEG **C.** CCITT **D.** Run Length*

You can choose from the following compression methods:

ZIP Works well on images with large areas of single colors or repeating patterns, and for black-and-white images that contain repeating patterns. Acrobat supports only 8-bit ZIP compression, which is *lossless*; that is, data is not removed to reduce file size, so image quality is not affected.

***Note:** Adobe implementation of the ZIP filter is derived from the zlib package of Jean-loup Gailly and Mark Adler, whose generous assistance we gratefully acknowledge.*

JPEG Suitable for grayscale or color images, such as continuous-tone photographs. JPEG is *lossy*, which means that it removes image data and may reduce image quality; however, it attempts to reduce file size with the minimum loss of information. Because JPEG compression eliminates data, it can achieve much smaller file sizes than ZIP compression.

CCITT Available only for monochrome bitmap images. CCITT (Consultative Committee on International Telegraphy and Telephony) compression is appropriate for black-and-white images and any images scanned with an image depth of 1 bit. Group 4 is a general-purpose method that produces good compression for most monochrome images. Group 3, used by most fax machines, compresses monochrome images one row at a time.

Run Length Produces the best results for images that contain large areas of solid white or black.

Fonts

Font embedding and substitution

A font can be embedded only if it contains a setting by the font vendor that permits it to be embedded. Embedding prevents font substitution when readers view or print the file, and ensures that readers see the text in its original font. Embedding increases file size only slightly, unless the document uses CID fonts, a font format commonly used for Asian languages. You can embed or substitute fonts in Acrobat or when you export an InDesign document to PDF.

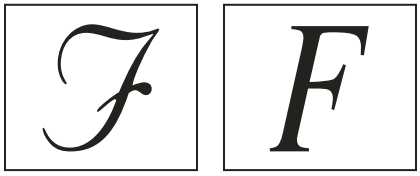
You can embed the entire font, or just a subset of the characters used in the file. Subsetting ensures that your fonts and font metrics are used at print time by creating a custom font name. That way, for example, your version of Adobe Garamond®, not your service provider's version, can always be used by the service provider for viewing and printing. Type 1 and TrueType fonts can be embedded if they are included in the PostScript file, or are available in one of the font locations that Distiller monitors and are not restricted from embedding.

Note: *(Acrobat) In some cases, TrueType fonts that have gone through a PostScript driver can no longer be searched, copied, cut, or pasted. To minimize this problem, use Acrobat on the same system on which the PostScript file was created, and make sure that the TrueType fonts used in the file are available on the system.*

When a font cannot be embedded due to the font vendor's settings, and someone who opens or prints a PDF does not have access to the original font, a Multiple Master typeface is temporarily substituted: AdobeSerifMM for a missing serif font, and AdobeSansMM for a missing sans serif font.

The Multiple Master typeface can stretch or condense to fit, to ensure that line and page breaks in the original document are maintained. The substitution cannot always match the shape of the original characters, however, especially if the characters are unconventional ones, such as script typefaces.

Note: *(Acrobat) For Asian text, Acrobat uses fonts from the installed Asian language kit or from similar fonts on the user's system. Fonts from some languages or with unknown encodings cannot be substituted; in these cases, the text appears as bullets in the file.*



If characters are unconventional (left), the substitution font will not match (right).

Accessing and embedding fonts using Distiller

When converting a PostScript file to PDF, Distiller needs access to the file's fonts to insert the appropriate information in the PDF. Distiller first searches the PostScript file for Type 1, TrueType, and OpenType fonts. If the font isn't embedded in the PostScript file, Distiller searches additional font folders. Distiller searches the following font folders in Windows:

- /Resource/Font in the Acrobat folder
- /Windows/Fonts

Distiller searches the following font folders in Mac OS:

- /Resource/Font in the Acrobat folder
- /Users/[user name]/Library/Fonts

- /Library/Fonts
- /System/Library/Fonts

The Acrobat installation includes width-only versions of many common Chinese, Japanese, and Korean fonts, therefore Distiller can then access these fonts in Acrobat. Make sure that the fonts are available on your computer. (In Windows, choose Complete when you install Acrobat, or choose Custom and select the Asian Language Support option. In Mac OS, these fonts are installed automatically.)

For information on including fonts in a PostScript file, see the documentation that came with the application and printer driver you use to create PostScript files.

Note: *Distiller does not support Type 32 fonts.*

Preview PDFs without local fonts

You can create a printable preview of your document that substitutes default fonts for any text formatted in fonts that are available on your local machine but are not embedded in the PDF. This can help you decide whether or not to embed those local fonts in the PDF, to achieve the look you want for your document.

1 In Acrobat, choose Edit > Preferences (Windows) or Acrobat 8 > Preferences (Mac OS.

2 Under Categories, select Page Display, and then deselect Use Local Fonts.

Note: *If a font cannot be substituted, the text appears as bullets, and Acrobat displays an error message.*

Add more folders to Distiller font searches

In addition to the default font folders, Distiller can also search other font folders that you specify.

1 Start Acrobat Distiller by doing one of the following:

- In Acrobat, choose Advanced > Print Production > Acrobat Distiller.
- Click or double-click an Acrobat Distiller icon or shortcut on the desktop, Start menu (Windows), or Dock (Mac OS).

2 Choose Settings > Font Locations. The dialog box displays a list of the folders that Distiller searches for fonts. These folders can be on your hard drive or on a network.

Distiller indicates that a font folder is available by displaying a folder icon to the left of the folder name. If no icon appears, or if an icon with an x through it appears with a folder name, the connection to the folder has probably been lost. You'll need to reestablish the connection.

3 To add a font folder, click Add, select the folder to add, and click OK (Windows) or Select Folder (Mac OS).

Note: *To provide Distiller with access to a font folder that has been moved, use this dialog box to remove the folder listed in its old location and add it in its new location.*

4 To remove a font folder, select the folder, and click Remove.

5 Select Ignore TrueType Versions Of Standard PostScript Fonts to exclude TrueType fonts that have the same name as a font in the PostScript 3 font collection.

6 Click OK.

Find PostScript font names

If you need to enter a font name manually on the Fonts panel of the Adobe PDF Settings dialog box, you can use a PDF to find the exact spelling of the name.

1 Use any application to create a one-page document with the font.

2 Create a PDF from the document.

3 Open the PDF in Acrobat, and choose File > Properties > Fonts.

4 Write down the name of the font, using the exact spelling, capitalization, and hyphenation of the name as it appears in the Font Info dialog box.

Chapter 4: Combining PDF content

Creating complex Adobe PDFs that include different types of files—files created in a variety of formats, even if they have different page sizes and page orientations—is actually quite easy in Acrobat 8.

It's also easier than you might imagine to make changes in a complex PDF so that it contains just the information you want to include, and does so in an orderly, unified, and efficient document that serves your needs.

Quickstart

The following topics provide brief overviews of common tasks for combining PDFs and adding unifying elements.

Create a PDF from multiple files

You can easily merge files of different types into a single PDF.

1. Click Combine Files, and then click Add Files.
2. Select the files you want to combine, and click Add Files.
3. Adjust the order of files as desired, and then choose a file size and conversion setting.
4. Click Next, select Merge Files Into A Single PDF, and click Create.

Rather than merging files, you can also create a PDF package of files.

See also

"Create merged PDFs and PDF packages" on page 121

Assemble PDFs in a package

A *PDF package* lets you assemble related information into a single PDF while maintaining individual PDFs within it.

1. Click Combine Files, and then click Add Files.
2. Select the files you want to combine, and click Add Files.
3. Adjust the order of files as desired, and then choose a file size and conversion setting.
4. Click Next, select Assemble Files Into A PDF Package, and click Create.

See also

"Create merged PDFs and PDF packages" on page 121

Modify a list of files to combine

When combining files, you have several options for adjusting the set of files.

1. Click Combine Files, click Add Files, and add the desired files.

2 To modify the list of files or remove a file from the list, select a file, and then do any of the following:

- Click Move Up or Move Down or drag the file to a new location.
- Click Choose Pages to include a subset of pages. (Button name might change based on file type.)
- Click Remove or press Delete.

See also

"Create merged PDFs and PDF packages" on page 121

Add headers and footers

You can add a single header and footer throughout a PDF or apply different headers and footers selectively to various pages.

1 Choose Document > Header & Footer > Add. If a message appears, click Add New.

2 Specify font and margin settings.

3 In the header and footer text boxes, type the desired text. Click the buttons below the boxes to insert a page number or date.

You can save header and footer settings for easy reuse.

See also

"Add and edit headers and footers" on page 125

Add a watermark

A watermark is text or an image that appears either behind or on top of content in a PDF.

1 Choose Document > Watermark > Add.

2 Do one of the following:

- Type the desired text and set the font attributes.
- Click File and browse to select the desired file.

3 Specify rotation, opacity, scale, location, and position.

You can save watermark settings for reuse. For example, save a "Draft" watermark to add to all review PDFs.

See also

"Add and edit watermarks" on page 131

Add a background

A background is an image or color that's placed behind content in a PDF.

1 Choose Document > Background > Add/Replace.

2 Do one of the following:

- Click From Color, click the color swatch, and choose a background color.
- Click File and browse to select the desired image file.

3 Set the rotation, opacity, scale, and position.

You can save background settings for reuse. For example, save an organizational emblem to add to official correspondence.

See also

"Add and edit backgrounds" on page 129

Rotate pages

You can rotate all or selected pages in a PDF.

1 Choose Document > Rotate Pages.

2 Specify the direction of the rotation and the page range.

3 Choose the desired options from the Rotate menus.

To temporarily rotate a page, choose View > Rotate View > Clockwise or Counterclockwise.

See also

"Rotate a page" on page 135

Delete pages

After combining files, you can delete unwanted or blank pages.

1 (Optional) Click the Pages button in the navigation pane and select the pages you want to delete.

2 Choose Document > Delete Pages.

3 Click Selected to delete selected pages or click From and specify a range.

If you want to retain a copy of the original PDF, make sure that you save the new document using Save As rather than Save.

See also

"Delete or replace a page" on page 136

Replace pages

To quickly update a PDF, you can replace individual pages.

1 Choose Document > Replace Pages.

2 Select the document that contains the replacement pages, and click Select.

3 Under Original, specify the pages you want to replace. Under Replacement, specify the beginning replacement page.

Interactive elements, such as links and bookmarks, associated with the original pages aren't deleted.

See also

"Delete or replace a page" on page 136

Renumber pages

When you renumber pages, only the numbers that appear in the Pages panel and the toolbar are affected. To change the numbers that appear on the document pages, add a header or footer.

1 Click the Pages button , and choose Number Pages from the Options menu.

2 Specify which pages the numbering will be applied to.

3 Specify the numbering style, prefix (if any), and starting number.

You can also continue the numbering style of the previous section.

See also

"Renumber pages" on page 138

Combining files into PDFs

Combining different types of files

You already know that you can convert many types of files into Adobe PDFs. But you can also group files as you convert them, so that the end result keeps those files together. For example, you could combine all the documents for a specific project—such as the text documents, email messages, spreadsheets, CAD drawings, PowerPoint presentations, and so forth—into a PDF or PDF package. When you use the Combine Files wizard, you can even limit the conversion to specific pages (or spreadsheets, or slides) within individual source documents.

There are three types of PDFs that involve multiple files:

Merged PDFs You can convert multiple files of various types to produce a *merged PDF:* one in which converted documents flow into the PDF as sequential pages.

PDF packages You can use the Combine Files wizard to convert multiple files of various types into a *PDF package*: a set PDF components in which each file appears separately and has its own pagination. Component files also retain their individual security settings, forms features, and default views, and digital signatures stay intact. On Windows, you can archive Outlook or Lotus Notes email messages and message folders as PDF packages, using PDFMaker within the email application.

PDFs embedded in other files You can insert PDFs into files in other formats that support Object Linking and Embedding (OLE), such as Adobe InDesign or Word documents.

See also

"Convert email messages to PDFs (Windows)" on page 77

About PDF packages

A PDF package converts multiple files—which can be in different formats and created in different applications—and assembles them into an integrated PDF unit. The original files retain their individual identities, but are still part of the one PDF package file. Each component file can be opened, read, edited, and formatted independently of the other component files in the PDF package.

You can create PDF packages when you use the Combine Files wizard, starting either from the Getting Started window, the Tasks toolbar, or the File > Combine Files command. In Windows, the Acrobat PDFMaker in Outlook and Lotus Notes can create PDF packages when you convert email messages to PDF or migrate PDF email archives created in earlier versions of Acrobat.

Depending on the circumstances, PDF packages offer several advantages over merging multiple files into an ordinary PDF:

Adding and deleting You can add or remove component documents easily, without having to find and select all the pages that originated in that file.

Viewing The component files do not open in separate windows, so you can quickly flip through them and make changes without having to pause for the Open or Save dialog boxes.

Editing You can make changes to individual PDFs within the PDF package without affecting the other component PDFs. For example, you can change the page numbering within that PDF, digitally sign, select different security settings, and so forth, without those changes applying to the other component documents. You can also rename components.

Distribution Because the PDF package is one file, you can share it with others and be sure that they are getting all the component parts.

Sorting The component PDFs in a PDF packages are listed under an assortment of categories that you can add to, delete, hide, and customize. Then, you simply click the category name to sort the list.

Printing The Print command on the File menu includes commands for printing the currently open document, all the documents in the PDF package, or multiple component documents selected in the PDF package list.

Searching The Advanced Search window includes options for searching the currently open document, all the documents in the PDF package, or multiple component documents selected in the PDF package list.

Incorporating other formats You can add non-PDF files to an existing PDF package without converting them to PDF. This can be done by a simple drag-and-drop process from the desktop, Microsoft Explorer, or the Mac OS Finder to the list of components in the open PDF package. Of course, non-PDF files do not enjoy all of the benefits of PDFs in the package.

Independence from source files The source files of a PDF packages—even existing PDFs you add to the package—are not changed when you create a PDF. Changes you make to the PDFs within the PDF package do not change the original files from which you created the PDF. You can move a PDF package anywhere on your computer or network without any risk of losing or disconnecting its components.

Reuse You can include or convert the same original source file into multiple PDF packages.

There are two limitations to PDF packages. They cannot be reviewed using one of the formal wizards or sent out in a data-collection workflow.

Note: *PDF packages are completely different from Collections that you create in the Acrobat Organizer. Organizer Collections are simply tools that help you find related PDFs, regardless of where they are stored in the folder structure on your computer. PDF packages are actual PDF files, each of which is stored in a single location on your computer. Also, PDFs attached to other PDFs do not offer the same benefits as PDF packages.*

See also

"View, sort, and search components in a PDF package" on page 27

"Convert email messages to PDFs (Windows)" on page 77

"Print documents in a PDF package" on page 431

Create merged PDFs and PDF packages

The choices you make in the Combine Files wizard determine whether the files are merged into a single PDF or combined into a PDF package.

1 Choose File > Combine Files, or click Combine Files on the Tasks toolbar.

If a PDF is currently open, it appears on the list of included files.

2 In the Combine Files wizard, do any or all of the following:

- To add individual files, click Add Files, navigate as needed, select the files, and click Add Files. Repeat as needed to add files in other locations.
- To select all the files in a specific location, click Add Folders, navigate to the needed folder, select it, and click OK. Repeat as needed.
- To select files that you have combined into PDFs in other sessions, click Reuse Files. Select a previously created PDF on the left list, and then, in the right list, select the component documents that you want to include. (If you have not used the Combine Files wizard before, this button is not available.)
- To add other currently open PDFs, click Add Open Files, and select those PDFs.
- (Windows) To add files or folders from Windows Explorer, drag them into the Combine Files wizard or right-click the selected items and choose Combine Supported Files In Acrobat.

If any files are password-protected, one or more messages appear, in which you must enter the correct password.

You can add a file more than once. For example, one file could be used for transition pages between other files or a blank file could be used to add blank pages.

3 Using the list of files, do any of the following:

- To rearrange the order of files on the list, select a file and drag it up or down the list. Or, select a file and click Move Up or Move Down.
- To remove a file from the list, select the filename and click Remove.
- To convert only part of a multipage source file, double-click the file, or select the file and click the Choose Pages button (see Note). In the Preview, review and select pages, as needed, following the instructions in the dialog box, which vary according to file type, and click OK. (Do not attempt to edit the document itself in the Preview.)

Note: *The name of the Choose button varies according to file type. For PDFs and Word documents, it is labeled Choose Pages. For PowerPoint files, it is Choose Slides; for Excel files, Choose Sheets; for AutoCAD, Choose Layouts; for Visio files, Sheet Selection.*

4 Select an appropriate file size and conversion options (as described in the following topic).

5 Click Next, and then do one of the following:

- To combine the files as sequential pages of a PDF, select Merge Files Into A Single PDF.
- To combine the files into a PDF package, select Assemble Files Into A PDF Package. Then select a cover-sheet option: Use Adobe Template or Use First Document.

Note: *If any of the selected files involve digital signatures, security settings, or XML forms, warnings will appear if you select Merge Files Into A Single PDF. In this case, combining the files into a PDF package is recommended. Also, a warning may appear if the first file listed is itself a PDF package because its cover sheet will be modified.*

6 Use the Move Up, Move Down, and Remove buttons to make any final adjustments to the file sequence, if necessary, and then click Create.

A status dialog box shows the progress of the file conversions. Some source applications may start and close automatically.

7 When the conversion is complete, review the preview thumbnails. If you want to make changes, click the Back button in the wizard, make the changes, and proceed forward again.

8 Click Save, and select a name and location for the merged PDF or PDF package.

The default name of a new package is Package *[n]*.

See also

"Convert email messages to PDFs (Windows)" on page 77

"Adobe PDF conversion settings" on page 99

Conversion settings

Conversion settings affect all files that will be converted to PDF from other file formats. The three options available in the Combine Files wizard apply three different conversion presets.

You can customize the default conversion preferences (choose Edit > Preferences, select Convert To PDF under Categories, and then specify the settings you want to use).

Smaller File Size Reduces large images to screen resolution and compresses, using low-quality JPEG. Suitable for on-screen display, email, and the Internet.

Note: *If any of the source files are already PDFs, the Smaller File Size option applies the Reduce File Size feature to those files. This is not done if either the Default File Size or Larger File Size option is selected.*

Default File Size Creates PDFs suitable for reliable viewing and printing of business documents.

Larger File Size Applies the High Quality Print conversion preset.

Options button Opens the Options For Conversion Settings dialog box, which contains the following options:

- **Always Enable Accessibility And Reflow** Improves the readability for users with disabilities and on small-screen devices.

- **Always Add Bookmarks To Adobe PDF** Converts existing bookmarks in different native file formats to Adobe PDF bookmarks.

Note: *An individual PDF created by merging multiple files into a single PDF has structured bookmarks that you can use to print or delete individual documents from the PDF. You can also use the bookmarks to extract the original component files as independent PDFs.*

Add custom cover sheets to PDF packages

Each PDF package includes a cover sheet, which appears each time you open the file. Typically, the cover sheet provides instructions or information that is helpful to users reading the package. The default cover sheet is the Adobe template, which briefly discusses viewing PDF packages.

The cover sheet does not appear in the list of component PDFs. However, you can go back to the cover sheet by clicking the Cover Sheet button in the PDF package navigation bar.

1 Using the authoring application of your choice, create the cover sheet.

2 In Acrobat, choose File > Combine Files, and proceed as usual to select files, folders, and pages, and to choose a conversion option, and click Next. Be sure to include your custom cover sheet as one of the files, and then click Next.

3 Select Assemble Files Into A PDF Package.

4 Select the custom cover sheet source file, and drag it or click the Move Up button until it appears at the top of the list.

5 Under Select Cover Sheet, choose Use First Document, and then click Create.

6 When the conversion is complete, click Save and specify and location and name for the PDF package file.

Extract component files in a PDF package

1 In the list of component files, select the files that you want to extract.

2 Do one of the following:

- Adjust the Acrobat window so that it does not completely fill the screen, and then drag the file onto the desktop, Windows Explorer, or the Finder.
- On the PDF package navigation bar, choose Options > Save File As, and select a location and name for the extracted file.
- Right-click/Control-click and choose Options > Save File As, and select a location and name for the extracted file.

See also

"View, sort, and search components in a PDF package" on page 27

Edit a PDF package

Editing a PDF package involves changes at the package level. For example, you can add or remove component files or set up new categories to facilitate sorting the components.

Editing the component PDFs within a package involves the same techniques used to make changes to any PDF, which are presented elsewhere in Help.

See also

"Editing text and objects" on page 347

"Adding unifying page elements" on page 125

Add unconverted files to a PDF package

1 On the PDF package navigation bar, choose Options > Add File, and select a location and name for the extracted file. Or, right-click/Control-click and choose Add File.

2 Open the PDF package, and adjust the Acrobat window so that it does not completely fill the screen.

3 On the desktop or in Windows Explorer or the Finder, select the file or files you want to add to the PDF package, and drag them into the list of component files in the Acrobat work area.

Add PDFs to a PDF package

❖ Do any of the following:

- In Windows Explorer or the Finder, select the PDFs you want to add to the currently open PDF package and drag them into the list of component files.
- In the PDF package navigation bar, choose Options > Add File or right-click/Control-click and choose Add File. Then locate and select the files you want to add.

Remove component files from a PDF package

❖ In the list of component files for the open PDF package, select the files that you want to remove and press Delete, or choose Options > Delete File.

Customize categories for the PDF list

1 Do one of the following:

- On the PDF package navigation bar, choose Options > Package Properties
- Right-click/Control-click the categories pane in the PDF package navigation pane, and choose Package Properties.

2 Click Add, and type a name for the new category in the Add Field dialog box.

3 Make any other changes you want in the Package Properties dialog box:

- To change the order in which the categories appear, select individual categories and click Up or Down until you have them in the order you want.
- To hide a category, deselect its check box, or select the category and click Hide.
- To show a category, select its check box, or select the category and click Show.
- To remove a category, select the category and click Delete.
- To change the default category for sorting the PDFs, choose another category name in the Sort By menu.
- To set the sorting order, select Ascending or Descending.
- To specify the default locations of the PDF list, select Top, Left, or Minimized in the Initial View menu.
- To open the currently displayed PDF each time you reopen the PDF package, select Show Current Document When Opening Collection.

Note: *Changes made to the Package Properties affect the entire PDF package and can be viewed by other users who open the PDF package.*

Edit category entries for the currently open component PDF

1 In the list of component files, select the file that you want to edit.

2 Do one of the following:

- On the PDF package navigation bar, choose Options > Edit Value > *[category name]*.
- Right-click/Control-click the categories bar or the selected component file, and choose Edit Value > *[category name]*.

3 In the Edit *[category name]* dialog box, type the text to appear under this category for the currently selected component file.

Insert one PDF into another

1 Open the PDF that you want to serve as the basis of the combined file, and choose Document > Insert Pages.

2 Select a PDF that you want to insert into the target document, and click Select.

3 In the Insert Pages dialog box, specify where you want to insert the document (before or after the first, last, or a designated page of the open PDF), and click OK.

4 To leave the original PDF intact as a separate file, choose Save As, and type a new name for the merged PDF.

You can also add an existing PDF with a currently open PDF by dragging the desktop icon for the PDF you want to add directly into position in the Pages panel of the open PDF.

Placing PDFs as linked files in other documents

You can incorporate PDFs into other types of files that support Object Linking and Embedding (OLE), such as InDesign or Word files. These files are called OLE *container documents*. Later, if you make changes to the original PDF, the OLE features in the container application can update the embedded file in the container document, reflecting your changes to the original PDF.

❖ Do one of the following:

- Choose the OLE container application's Insert Object command or Insert Hyperlink command.
- In Acrobat, choose Edit > Copy File To Clipboard, and then choose the Paste Special command in the container application.

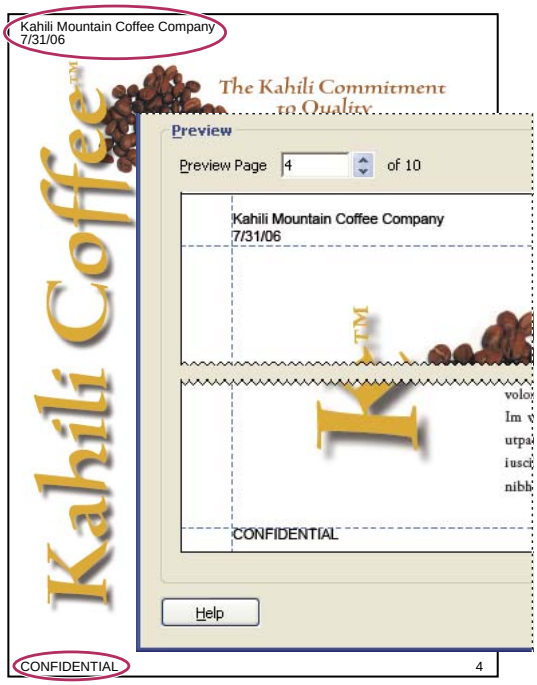
Adding unifying page elements

Add and edit headers and footers

A header and footer present consistent information in the page margins throughout a PDF. For example, the information could be a date, automatic page numbering, the title of the overall document, or author's name.

You can vary the headers and footers within a PDF. For example, you can add a header that displays the page number on the right side of odd-numbered pages, and another header that displays the page number on the left side of even-numbered pages. Each of these headers must be added individually.

You can define and save your headers and footers to reuse them later, or you can simply apply a header and footer and forget it. After applying a header and footer, you can edit, replace, or delete it in the PDF. You can also preview headers and footers before applying them and adjust the header and footer margins so that they don't overlap other page content.



A header appears at the top of the page. A footer appears at the bottom of a page.

Define and apply headers and footers

You can add one or more sets of headers and footers to a PDF and apply them either globally or selectively to its pages. Each set of headers and footers must be applied in a separate session in the Add Header And Footer dialog box. Headers and footers can include automatically generated information and formatting, such as page numbering and the current date.

If you use the same types of headers and footers frequently, you can save header and footer definitions so that you can quickly apply them to other PDFs.

1 Choose Document > Header & Footer > Add. If a message appears, click Add New.

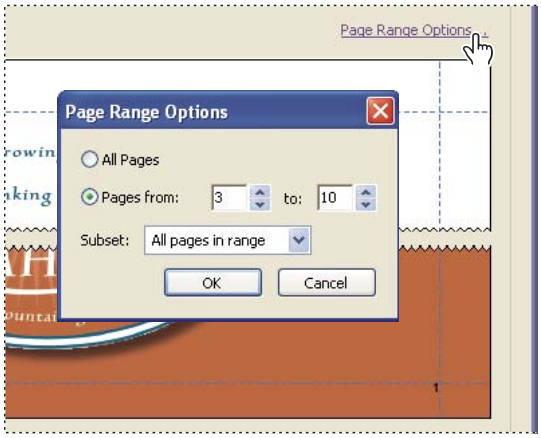
2 Select your preferences for the font, type size, text color, and text underlining of the header and footer.

Note: *The text properties apply to all header and footer entries that are part of this setting definition. You cannot apply different settings to individual header or footer text boxes within the same session in the Add Header And Footer dialog box.*

3 Using the three header text boxes and three footer text boxes, type the text that you want to appear in any of these locations, and then do any of the following:

- To add the date of creation, click inside one of the header or footer text boxes, and click the Insert Date button.
- To add automatic page numbering, click inside one of the header or footer text boxes, and click the Insert Page Number button.
- To select formatting for automatic entries, click the Page Number And Date Format button, and choose the Date Format, Page Number Format, and Start Page Numbers At settings that you want to use.

Note: *You can combine text with dates and page numbers. You can also add several lines of text to an entry. Text typed in the Left, Center, and Right boxes appears left-aligned, centered, and right-aligned, respectively.*



Limiting header and footer to a range of pages

4 If you want to limit the pages on which the header and footer appear, click the Page Range Options button, and do the following:

- To limit the header and footer to a specific range of pages, select Pages From, and enter the beginning and ending page numbers.
- To limit the header and footer to one side or the other of a document with facing pages, choose an option on the Subset menu: Even Pages Only or Odd Pages Only. Otherwise, leave the default setting: All Pages In Range.

5 As needed, change the values in the Top, Bottom, Left, and Right options to adjust the margins within the header and footer, using the Preview area to evaluate the results.

To prevent any overlapping, you can click the Appearance Options button and select Shrink Document To Avoid Overwriting The Document's Text And Graphics. To prevent resizing or repositioning when printing the PDF in large format, select Keep Position And Size Of Header/Footer Text Constant When Printing On Different Page Sizes.

6 Examine the results in the Preview area, using the Preview Page option to see different pages of the PDF.

7 (Optional) At the top of the dialog box, click Save Settings, type a descriptive name for the header and footer settings, and click OK. Then click OK again to apply the header and footer to the PDF.

If you want to add additional headers or footers, simply repeat this procedure.

Update the headers and footers

Updating applies to the most recently added header and footer set.

1 Choose Document > Header & Footer > Update.

2 Make the changes you want.

Add another header and footer

1 Choose Document > Header & Footer > Add, and then click Add New in the message that appears.

The preview shows any existing headers and footers.

2 Type text in the header and footer text boxes to add more headers and footers, noticing that the preview updates the appearance of the complete headers and footers on the page.

3 Select new formatting options, as preferred, again noticing the updating in the preview.

Replace all headers and footers

1 Choose Document > Header & Footer > Add, and then click Replace Existing in the message that appears.

2 Type text in the header and footer text boxes.

3 Select formatting options, as needed.

Note: *This process applies only to headers and footers added in either Acrobat 7 or Acrobat 8.*

Remove all headers and footers

❖ Do one of the following:

- To remove all headers and footers, choose Document > Header & Footer > Remove, and then click Yes in the confirmation message that appears.
- To remove one header and footer immediately after adding it, choose Edit > Undo Headers/Footers.

Note: *This process applies only to headers and footers added in either Acrobat 7 or Acrobat 8.*

Add a Bates numbering header or footer

Bates numbering is a method of indexing legal documents for easy identification and retrieval. Each page of each document is assigned a unique Bates number that also indicates its relationship to other Bates-numbered documents. Bates numbers appear as headers or footers on the pages of each PDF in the batch.

Although the Bates identifier is referred to as a number, it can include an alphanumeric prefix and suffix, which can make it easier to recognize the central subject matter of the files.

Adding Bates numbering does not change the filenames of the PDFs, rearrange them in desktop folders, link them, or add them to a collection in the Organizer. You can tell that Bates numbering has been added only by opening the PDF and looking at the headers and footers.

Note: *Bates numbering is unavailable for protected or encrypted files and some forms, and it applies only to the cover sheets of existing PDF packages. However, Bates numbering can be applied to individual PDFs that are then assembled into a PDF package.*

Add Bates numbering

1 In Acrobat, choose Advanced > Document Processing > Bates Numbering > Add.

2 In the Bates Number dialog box, do any of the following:

- To include any open PDFs, select Include All Open PDF Documents.
- To add other PDFs, click Browse, navigate to a folder, and select the files you want to apply Bates numbers to. Repeat as needed until all the PDFs you want to include are listed.

3 Adjust the list of PDFs, as needed:

- To change the order in which Bates numbers will be assigned, select a PDF in the list and drag it to a different position or click Move Up or Move Down as needed.
- To verify a PDF on the list, select it and click Preview, which opens a window in which you can see each individual page of the PDF.
- To remove a PDF from the list, select it and click Remove.

4 Click Next. Then, in the Add Header And Footer dialog box, click to place the insertion point in the header or footer text box in which you want the Bates number to appear (such as Left Header Text or Center Footer Text).

5 Click Insert Bates Number. Then enter the text that you want to make up the Bates numbers:

- In Number Of Digits, specify how many digits make up the Bates number, entering any number between 6 and 15. The default number is 6, which produces Bates numbers such as 000001, 000002, and so forth.
- In Start Number, enter the number that will be assigned to the first PDF on the list. The default number is 1.
- In Prefix, type any text that you want to appear before the Bates number.
- In Suffix, type any text that you want to appear after the Bates number.

Note: *For court cases involving very large numbers of pages, enter a higher value in Number Of Digits. Do not use the # character in the Prefix or Suffix text.*

6 Click OK and then make any other changes to the settings, as you would for any other header and footer.

Add more documents to a Bates numbering series

Before you begin, be sure that you know the last applied Bates number in the series.

1 Follow the procedure described above to start the Bates numbering process, selecting the files that you want to add to the series.

2 After you click Insert Bates Number, type the Suffix and Prefix text that matches the rest of the series, and then type the next number in the series in Start Number.

3 When you finish changing settings in the Add Header And Footer dialog box, click OK.

Search for Bates-numbered PDFs

1 Choose Edit > Search.

2 As the search word or phrase, type in all or part of the Bates numbering that you want to find.

For example, if you want to find a specific document and know its Bates number, type in the complete number as the search text. If you want to find any documents in a Bates number series, type in a distinctive portion of the Bates series, such as the prefix or suffix.

3 Under Look For Files In, click Browse (if necessary) and select the folder, computer drive, or network location that you want to search, and then click Search.

Remove Bates numbering

You can remove Bates numbering, but this also removes all the headers and footers in the PDFs.

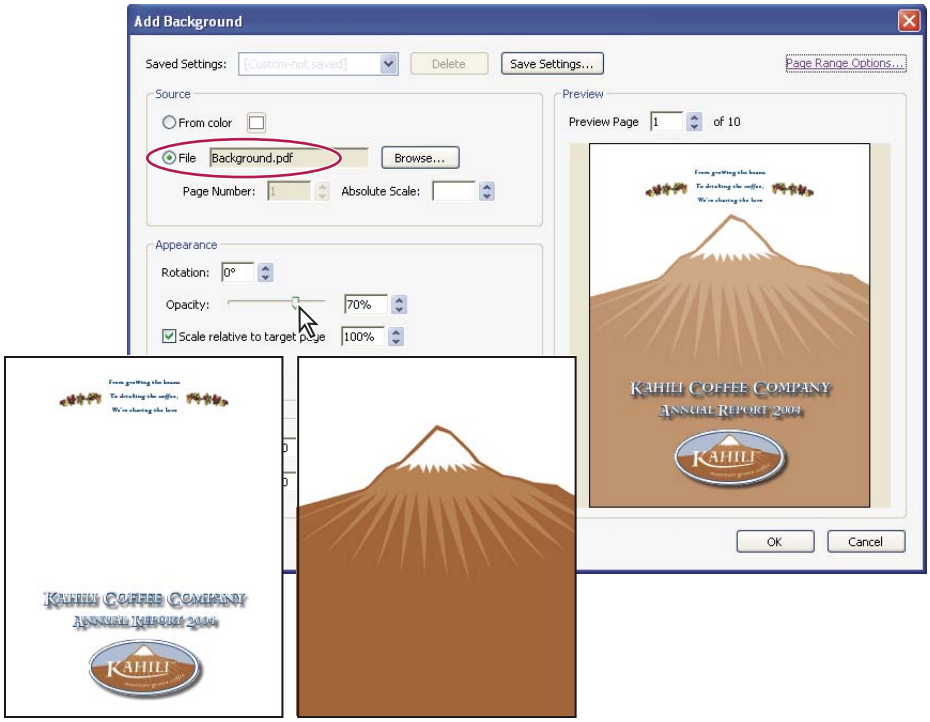
1 In Acrobat, choose Advanced > Document Processing > Bates Numbering > Remove.

2 In the Bates Number dialog box, click Browse, navigate to a folder, and select PDFs. Repeat as needed until all the PDFs you want are listed, and then click Next.

3 Click OK to remove the Bates numbering and all other headers and footers, or click Cancel and start over if you want to start over and choose different files.

Add and edit backgrounds

A *background* appears behind text or images on the page. The background can be as simple as a solid color or you can use an image. You can selectively apply a background to only specific pages or page ranges in a PDF. A PDF supports only one background per page, but the backgrounds can vary from page to page.



Before and after adding a background

Add, replace, or edit a background

1 Choose Document > Background > Add/Replace.

Note: *If a message appears, telling you that the current document already has a background, click Replace Background. If you apply the new background to a limited range of pages, the old background will remain unchanged on pages outside of that range.*

2 (Optional) To apply the background selectively to individual pages, click Page Range Options, select Pages From, and enter beginning and ending page numbers; then choose a Subset option for applying the background only to odd pages, even pages, or both.

3 For Source, specify what you want to serve as the background:

- To reuse a background and background options that you saved in an earlier session, select it in the Saved Settings menu.
- To apply a solid color background, select From Color. Then click the color swatch to open the color picker, and select a color swatch or custom color.
- To use an image, select File. Then click Browse, locate the image file you want to use, and select it.

Note: *Only PDF, JPEG, and BMP files can be used as background images.*

4 Adjust the appearance and position of the background, as needed:

- To select a specific image in a multipage file, enter it in Page Number.
- To show an image file at a specific percentage of its full-size display, enter a value in Absolute Scale.
- To rotate a background image or colored area, enter a value in Rotation.
- To give the background image or color some transparency, drag the Opacity slider to the left or enter a percentage value.

- To resize a background image as a percentage of the PDF page size, select Scale Relative To Target Page.
- To show or hide the background when printing or viewing on screen, click Appearance Options and select the items you want to apply.
- To shift the position of the background image or colored area, enter values for the Vertical Distance from the Top, Center, or Bottom of the page and the Horizontal Distance from the Left, Center, or Right of the page.

5 If a message appears after you click OK, telling you that backgrounds have already been defined for some pages in the page range, click OK.

Update a recently edited background image

If the original image file that you are using as a background changes, you can update the PDF to show the new version of the image rather than removing the old version and re-adding the new one.

1 Choose Document > Background > Update.

2 Click OK, or make other changes to the background options and then click OK.

Note: *This process applies only to backgrounds added in either Acrobat 7 or Acrobat 8.*

Remove a background from PDF pages

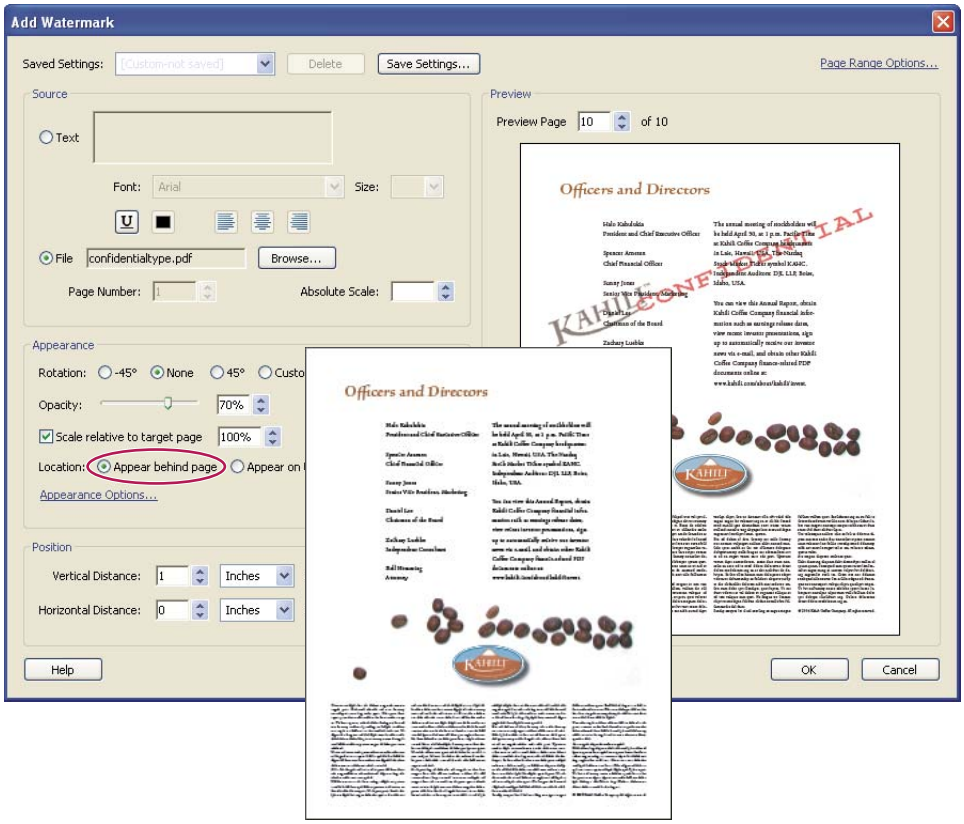
❖ Do one of the following:

- To remove the background from only some pages in the PDF, choose Document > Background > Add/Replace. Then click Page Range Options, and enter page numbers and Subset options to restrict the background to the designated pages.
- To remove the background from all pages, choose Document > Background > Remove, and click OK to confirm the removal.
- To remove a background from all pages immediately after adding it, choose Edit > Undo Add Background.

Add and edit watermarks

A *watermark* is text or an image that appears either above or behind existing document content, similar to a stamp. For example, you might want to apply a "Confidential" watermark to pages with sensitive information. You can add multiple watermarks to a PDF, and you can specify the page or range of pages on which each watermark appears.

Note: *Unlike a stamp, a watermark is integrated into PDF pages as a fixed element. A stamp is a type of PDF comment, which others reading the PDF may open to display a text annotation, move, change, or delete.*



Before and after adding a watermark

Add or replace a watermark

You can add multiple watermarks to a PDF, but each one must be added separately.

1 Choose Document > Watermark > Add. If the PDF already contains one or more watermarks, a message appears; select Add New if you want to create an additional watermark, or select Replace Existing if you want to replace all existing watermarks with a new one.

2 (Optional) To apply the watermark selectively to individual pages, click Page Range Options, select Pages From, and enter beginning and ending page numbers; then choose a Subset option for applying the watermark only to odd pages, even pages, or both.

3 Specify the Source option:

- To create a text watermark, select Text, type the text you want to appear as the watermark in the text box, and then adjust the font, font size, font color, underlining, and paragraph-alignment options, as needed.
- To use an image as a watermark, select File. Then click Browse, locate the image file you want to use, select it, and click Open. If the file has multiple pages with images, click the Page Number up and down arrows to select the page you want.

Note: *Only PDF, JPEG, and BMP images can be used as watermarks.*

4 To change the size of an image watermark, do one of the following:

- To resize the watermark in relation to the actual size of the original image file, enter a percentage in the Absolute Scale option (in the Source area of the dialog box).

- To resize the watermark in relation to the PDF page dimensions, enter a percentage in the Scale Relative To Target Page (in the Appearance area of the dialog box).

5 Adjust the appearance of the text or image watermark, as needed:

- To rotate the watermark, select an angle of rotation or enter a custom value.
- To give the watermark some transparency, drag the Opacity slider or enter a percentage.
- To stack the watermark relative to the page content, select Appear Behind Page (page content overprints the watermark) or Appear On Top Of Page (watermark overprints the page content).
- To specify when the watermark appears, click Appearance Options and select or deselect Show When Printing and Show When Displaying On Screen.
- To control variations in a PDF with pages of varying sizes, click Appearance Options and select or deselect Keep Position And Size Of Watermark Text Constant When Printing On Different Page Sizes.

6 Specify the position in which you want the watermark to appear by entering the vertical and horizontal distances between the watermark and the left, right, center, top, or bottom of the page.

Update a watermark

1 Choose Document > Watermark > Update.

2 Make changes to the watermark, and then click OK.

Important: *If you have multiple watermarks in a PDF, this procedure will update only the first watermark you added and will discard all other watermarks. If you change your mind about updating the watermarks after you have completed this process, immediately choose Edit > Undo Watermark.*

Remove watermarks

❖ Do one of the following:

- To remove all watermarks from all pages, choose Document > Watermark > Remove, and click OK to confirm the removal.
- To remove a watermark from all pages immediately after adding it, choose Edit > Undo Watermark.

Crop pages

The Crop Pages dialog box is where you can adjust the visible page area. This can help you create consistency within a PDF composed of pages of different sizes.

Cropping does not reduce file size because information is merely hidden, not discarded.



When you prepare a PDF for printing, you can change the Art, Trim, and Bleed areas for a PDF page in the Crop dialog box. If you want to see indicators of these areas in the document pane, select the Display Art, Trim, Bleed Boxes option in the Page Display Preferences. (Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Page Display under Categories.)

Crop empty areas around page content

1 Choose Document > Crop Pages.

2 Under Margin Controls, select Remove White Margins.

Crop one or more pages

1 Choose Document > Crop Pages.

2 In the pop-up menu in the upper left corner, leave CropBox selected, and then adjust values for the Margin Controls: Top, Bottom, Left, and Right.

A black rectangle in the thumbnail page display shows the adjusted boundaries of the cropped page.

3 (Optional) One by one, select ArtBox, TrimBox, and BleedBox in the pop-up menu, and adjust the Margin Control values each time. The adjusted boundaries appear as rectangles in the thumbnail page display: red, green, and blue, respectively.

4 Select other options under Change Page Size, as appropriate for your PDF.

5 Under Page Range, in the lower right area of the dialog box, do any of the following:

- To crop all pages in the PDF, select All.
- To crop only one page or a range of pages, select From, and enter page numbers in the From and To options.
- To crop only every other page, choose either Odd Pages Only or Even Pages Only from the Apply To menu. Otherwise, leave Even And Odd Pages selected.

Note: *If you select a range of pages to be cropped, the odd- or even-pages setting applies only within that range. Otherwise, it applies to all pages in the document.*

Because the Crop property is selected by default, the margin values that you specify determine the final Crop boundary. The dialog box displays each selected property as a differently colored box in the preview area. Select Show All Boxes to preview all properties at once. Select each property that you want to adjust.

Crop a page with the Crop tool

1 Choose Tools > Advanced Editing > Crop Tool.

2 Drag a rectangle on the page you want to crop. If necessary, drag the corner handles of the cropping rectangle until the page is the size you want.

3 Double-click inside the cropping rectangle.

The Crop Pages dialog box opens, indicating the margin measurements of the cropping rectangle and the page to be cropped. You can override these settings or apply other options by making new selections in the dialog box before clicking OK.

Crop Pages dialog box settings

Show All Boxes Shows the black, red, green, and blue rectangles indicating the CropBox, ArtBox, TrimBox, and BleedBox on the page thumbnails. When two (or more) margins coincide, only a colored line appears.

CropBox Defines the boundary for the contents of a page when it's displayed or printed. If not otherwise specified (for example, in the JDF settings), the crop boundary determines how page contents are positioned on the output medium.

ArtBox Defines the meaningful content of the page, including white space.

TrimBox Defines the finished dimensions of the page after trimming.

BleedBox Defines the clipping path when the page is printed professionally to allow for paper trimming and folding. Printing marks may fall outside the bleed area.

Remove White Margins Crops the page to the artwork boundary. This option is useful for trimming the edges of presentation slides saved as PDFs.

Set To Zero Restores the crop margins to zero.

Revert To Selection Reverts to the crop margin selected with the Crop tool.

Undo cropping

Cropping a PDF does not reduce file size because information is merely hidden, not discarded. By resetting the page size, you can restore the page and its content to its original condition.

1 Open the Crop Pages dialog box by choosing one of the following:

- Document > Crop Pages.
- Crop Pages from the Options menu on the Pages panel.

2 Reset the margins to the original dimensions.

Rearranging pages in a PDF

Rotate a page

You can rotate all or selected pages in a document. Rotation is based on 90° increments.

1 Open the Rotate Pages dialog box using one of the following methods:

- Choose Document > Rotate Pages.
- From the Options menu on the Pages panel, choose Rotate Pages.

2 For Direction, select the amount and direction of the rotations: Counterclockwise 90 Degrees, Clockwise 90 Degrees, or 180 Degrees.

3 For Pages, specify whether all pages, a selection of pages, or a range of pages are to be rotated.

4 From the Rotate menu, specify even pages, odd pages, or both, and select the orientation of pages to be rotated.

To temporarily change your view of the page, choose View > Rotate View > Clockwise or Counterclockwise. The original page orientation is restored the next time you open the PDF.

Extract pages in a PDF

Extraction is the process of reusing selected pages of one PDF in a different PDF. Extracted pages contain not only the content but also all form fields, comments, and links associated with the original page content.

You can leave the extracted pages in the original document or remove them during the extraction process—comparable to the familiar processes of cutting-and-pasting or copying-and-pasting, but on the page level.

Note: *Any bookmarks or article threading associated with pages are not extracted.*

1 Open the PDF in Acrobat and choose Document > Extract Pages.

2 Specify the range of pages to extract.

3 In the Extract Pages dialog box, do one or more of the following before you click OK:

- To remove the extracted pages from the original document, select Delete Pages After Extracting.
- To create a single-page PDF for each extracted page, select Extract Pages As Separate Files.
- To leave the original pages in the document and create a single PDF that includes all of the extracted pages, leave both check boxes deselected.

4 If a message appears asking you to confirm the deletion, click Yes to delete the extracted pages from the original PDF, or click No to go back to the Extract Pages dialog box.

The extracted pages are placed in a new document named Pages From *[original document name]-[n]*.

Note: *The creator of a PDF document can set the security to prevent the extraction of pages. To view the security settings for a document, choose File > Properties, and select Security.*

See also

"Extract component files in a PDF package" on page 123

Move or copy a page

You can use page thumbnails to copy or move pages within a document and between documents.

When you drag a page thumbnail in a Pages panel, a bar appears near other thumbnails, indicating the position in which it will appear in the PDF. This bar appears at the bottom or top when the thumbnails are in a single column, or to the left or right if more than one column of thumbnails is displayed.

Note: *Tagged bookmarks affect the order that reading devices follow, such as devices for the visually impaired. Tagged bookmarks do not change the sequence of pages in a PDF.*

See also

"Insert one PDF into another" on page 124

"About tags, accessibility, reading order, and reflow" on page 289

Move or copy a page within a PDF, using page thumbnails

1. Click the Pages button to open the Pages panel, and select one or more page thumbnails.
2. Do one of the following:

- To move a page, drag the page number box of the corresponding page thumbnail or the page thumbnail itself to the new location. A bar appears to show the new position of the page thumbnail. The pages are renumbered.
- To copy a page, Ctrl-drag/Option-drag the page thumbnail to a second location.

Move or copy a page between two PDFs, using page thumbnails

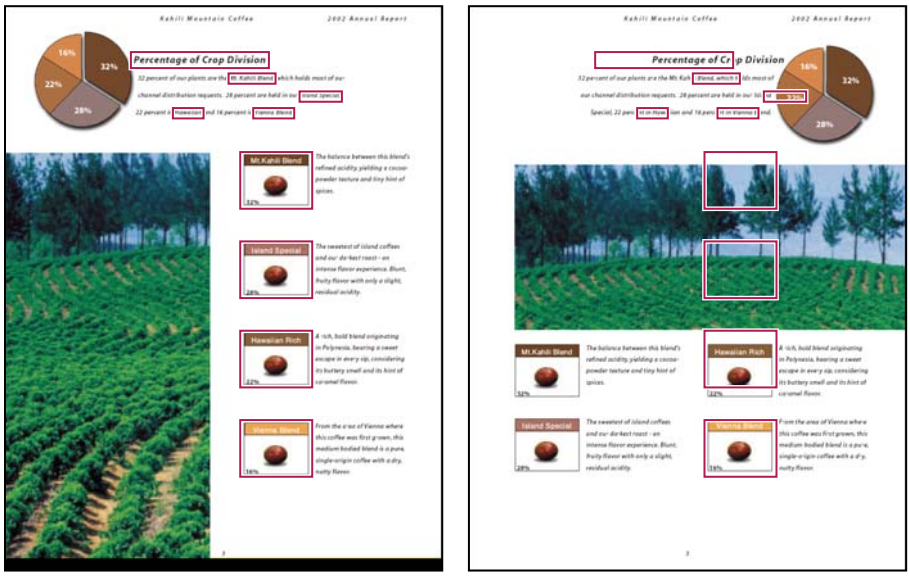
1. Open both PDFs, and display them side by side.
2. Open the Pages panels for both PDFs, and do one of the following:

- To copy a page, drag the page thumbnail into the Pages panel of the target PDF. The page is copied into the document, and the pages are renumbered.
- To remove a page from one PDF and insert it into another PDF, select the page thumbnail and Ctrl-drag/Option-drag it into the Pages panel of the target PDF. The page is inserted into the target document and deleted from the source document. The pages are renumbered.

Delete or replace a page

You can replace an entire PDF page with another PDF page. Only the text and images on the original page are replaced. Any interactive elements associated with the original page, such as links and bookmarks, are not affected. Likewise, bookmarks and links that may have been previously associated with the replacement page do not carry over. Comments, however, are carried over and are combined with any existing comments in the document.

After you delete or replace pages, it's a good idea to use the Reduce File Size command to rename and save the restructured document to the smallest possible file size.



A page before and after it is replaced. The page's bookmarks and links remain in the same locations.

Delete pages, using the Delete command

Note: *You cannot undo the Delete command.*

1 Choose Document > Delete Pages.

2 Enter the page range to be deleted, and click OK.

You cannot delete all pages; at least one page must remain in the document.

If you select Use Logical Page Numbers in the Page Display panel of the Preferences dialog box, you can enter a page number in parentheses to delete the logical equivalent of the page number. For example, if the first page in the document is numbered i, you can enter (1) in the Delete Pages dialog box, and the page is deleted.

Delete pages, using page thumbnails

1 In the Pages panel, select a page or group of pages:

- Select the page number box of the thumbnail or the page thumbnail itself.
- Shift-click to select a range of page thumbnails. Ctrl-click/Command-click to add to the selection. Or, in Windows, press Ctrl+A to select all thumbnails, and then Ctrl-click to deselect the pages that you want to keep.
- Drag a rectangle around a group of page thumbnails.

2 Do one of the following:

- Choose Delete Pages from the Pages panel Options menu, and click OK.
- Click the trash icon at the top of the Pages panel.

Delete material associated with a tagged bookmark

1 In the Bookmarks panel, click the tagged bookmark for the material you want to delete. Shift-click to select multiple bookmarks.

2 Choose Delete Page(s) from the Options menu. The tagged bookmark and its associated page are deleted from the document.

Replace the contents of a page

1 Open the PDF that contains the pages you want to replace.

2 Choose Document > Replace Pages.

3 Select the document containing the replacement pages, and click Select.

4 Under Original, enter the pages to be replaced in the original document.

5 Under Replacement, enter the first page of the replacement page range. The last page is calculated based on the number of pages to be replaced in the original document.

Replace pages using a page thumbnail

1 Open the PDF that contains the pages you want to replace, and then open the PDF that contains the replacement pages.

2 In the Pages panel of the PDF that contains the replacement pages, select a page or group of pages:

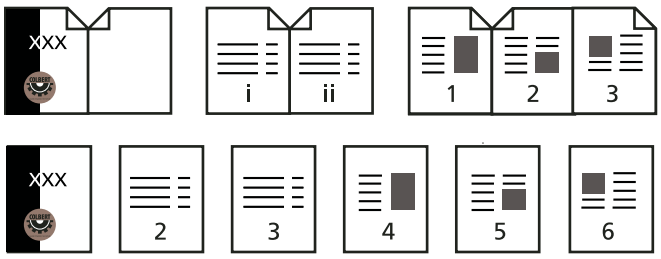
- Select the page number boxes of the page thumbnails that you want to use as replacement pages.
- Shift-click to select multiple page thumbnails. Ctrl-click/Command-click to add to the selection.
- Drag a rectangle around a group of page thumbnails.

3 Drag the selected page thumbnails onto the Pages panel of the target document. Release the mouse button when the pointer is directly over the page number box of the first page thumbnail you want to replace so that these pages become highlighted.

The pages you selected in the first document replace the same number of pages in the second document, starting at the page number you selected to drop the new pages on.

Renumber pages

The page numbers on the document pages do not always match the page numbers that appear below the page thumbnails and in the Page Navigation toolbar. Pages are numbered with integers, starting with page 1 for the first page of the document. Because some PDFs may contain front matter, such as a copyright page and table of contents, their body pages may not follow the numbering shown in the Page Navigation toolbar.



Printed page numbering (top) compared to logical page numbering (bottom)

You can number the pages in your document in a variety of ways. You can specify a different numbering style for groups of pages, such as 1, 2, 3, or i, ii, iii, or a, b, c. You can also customize the numbering system by adding a prefix. For example, the numbering for chapter 1 could be 1-1, 1-2, 1-3, and so on, and for chapter 2, it could be 2-1, 2-2, 2-3, and so on.

Using the Number Pages command affects only the page thumbnails on the Pages panel. You can physically add new page numbers to a PDF using the headers and footers feature.

1 Click the Pages button to open the Pages panel, and choose Number Pages from the Options menu.

2 Specify a page range. (Selected refers to pages selected in the Pages panel.)

3 Select one of the following, and then click OK:

Begin New Section Starts a new numbering sequence. Choose a style from the pop-up menu, and enter a starting page number for the section. Specify a prefix, if desired.

Extend Numbering Used In Preceding Section To Selected Pages Continues the numbering sequence from previous pages without interruption.

See also

"Add and edit headers and footers" on page 125

Chapter 5: Exporting PDFs

If you don't have access to the source files that created an Adobe PDF, you can still copy images and text from the PDF to use elsewhere, or export the PDF to a reusable format. You can also export images in a PDF to another format.

Quickstart

Following are overview steps to some common conversion tasks.

Export as Word

If you don't have the original file from which a PDF was created, you can save the PDF as a Word document that you can then edit in Word.

1 Click Export in the Tasks toolbar, and then choose Word Document.

2 Click Settings to set conversion options.

Note: *When you save a PDF to Word format, the resulting file isn't equivalent to a file created in Word; some coding information may be lost.*

See also

"Export PDFs as text" on page 145

Export as HTML or XML

To easily use the content of a PDF on the web, simply convert the PDF to HTML or XML format.

1 Click Export in the Tasks toolbar, and then choose HTML Web Page or XML 1.0.

2 Click Settings to set conversion options.

You can save a PDF in HTML 3.2 format by clicking Export, and choosing More Formats > HTML 3.2.

See also

"Export PDFs" on page 142

Export as text

You can save a PDF in Rich Text Format (RTF), as accessible text, or as plain text. RTF preserves the most formatting. Accessible text preserves such items as comments, form fields, and alternate text.

1 Click Export in the Tasks toolbar, choose More Formats, and then choose the desired text format.

2 If saving to RTF or plain text, click Settings to adjust the conversion settings.

See also

"Export PDFs as text" on page 145

Select and copy text

You can copy words, lines, or columns of text from a PDF.

1 Using the Select tool, do any of the following:

- Drag across text.
- Double-click or triple-click to select a word or a line of text.

2 Move the pointer over the icon that appears next to the selected text, and then choose an option from the menu.

If you cannot select text, it may be part of an image or from a scanned document.

See also

"Select and copy text" on page 146

Select and copy an image

You can copy an image from a PDF to the clipboard or to another application, or you can save it to a file.

1 Using the Select tool, click an image or drag to select a portion of it after the pointer changes to a crosshairs icon.

2 Do any of the following:

- Drag the image into an open document in another application.
- Right-click/Control-click the image and choose Copy Image or Save Image As.

See also

"Copy images" on page 148

Take a snapshot of a page

Use the Snapshot tool to copy all selected content. Text and images are both copied as an image.

1 Choose Tools > Select & Zoom > Snapshot tool.

2 Drag on the page to select content, or click to copy the entire page.

The selected content is copied to the clipboard when you release the mouse button.

See also

"Take a snapshot of a page" on page 149

Exporting PDFs to other file formats

Export PDFs

You can save a PDF to a number of different file formats, and then open and use that file in other applications. The available formats include both text and image formats. To make a PDF compatible with earlier versions of Adobe Acrobat and Adobe Reader, you can resave the PDF to an earlier version of the PDF format.

1 With the PDF open, do one of the following:

- Click the Export button in the Tasks toolbar and choose a file format or choose More Formats.
- Choose File > Export, and choose a file format.
- Choose File > Save As, and choose a file format from the menu.

2 Click Settings to set conversion options. (If the Settings button is unavailable, there are no options for the format that you selected.) Click OK to apply the settings. Conversion settings can also be edited in the Convert From PDF Preferences.

Note: *These conversion settings are stored separately from the settings used with the Export All Images command.*

3 Click Save to export the PDF to the selected file format.

By default, the source file name is used as the file name, with the new extension, and the exported file is saved in the same folder as the source file. When you save a PDF in an image format, each page is saved as a separate file.

File format options

When you export PDFs to different file formats using the Save As command, each file format includes unique conversion settings.

If you want to use the same settings every time you convert PDFs to a particular format, specify those settings in the Convert From PDF preferences. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Convert From PDF from the left. Select a file format from the list and click Edit Settings. (Click the Default button at any time to revert to the default settings.)

Adobe PDF options

You can resave PDFs as optimized PDFs, using settings in the PDF Optimizer dialog box. The PDF Optimizer lets you change the compatibility version of your PDFs so they can be viewed using older versions of Acrobat or Adobe Reader. When you change the compatibility setting, newer features may be unavailable in the PDF. For an explanation of each compatibility setting, see "PDF compatibility levels" on page 109.

PostScript or Encapsulated PostScript (EPS) options

You can export a PDF to PostScript for use in printing and prepress applications. The PostScript file includes full DSC (Document Structuring Conventions) comments and other advanced information preserved by Adobe Acrobat Distiller. You can also create an EPS file from any PDF for placement or opening in other applications. The options available depend on whether you are converting a document to PostScript or EPS. (For a complete description of PostScript options, see "PostScript options" on page 434.)

Note: *If you are creating EPS files for separations, all image color spaces should be CMYK.*

Printer Description File The PostScript Printer Description (PPD) provides the necessary information to format a PostScript file correctly for a particular output device. Device Independent creates only composite (not color-separated) PostScript or EPS files. Acrobat Default provides a starting point and reference for creating all types of

PostScript and restores all default settings for the conversion. Adobe PDF 7.0 is compatible with most devices.This option is available only for PostScript (PS) format.

ASCII or Binary Specifies the output format of image data. Binary output yields smaller files, but not all workflows can accommodate binary output.

PostScript Specifies the level of PostScript compatibility. Use Language Level 3 only if the target output device supports it. Language Level 2 is suitable for EPS files that will be placed in another document and color-separated as part of that document. Use Language Level 2 for EPS files that you import into Microsoft applications.

Page Range Specifies the pages you want to export. When you export files to EPS output, each page in the range is saved as a separate EPS file.

HTML or XML options

When you export a PDF file to HTML or XML format, any images in PDF are converted to JPEG format.

Encoding Refers to the binary values, based on international standards, used to represent the text characters. UTF-8 is a Unicode representation of characters using one or more 8-bit bytes per character; UTF-16 represents characters using 16-bit bytes. ISO-Latin-1 is an 8-bit representation of characters that is a superset of ASCII. UCS-4 is a Universal Character Set coded in 4 octets. HTML/ASCII is a 7-bit representation of characters developed by ANSI.

Use Mapping Table Default uses the default character encoding defined in mapping tables, which appear in the Plug-ins/SaveAsXML/MappingTables folder. These mapping tables specify many characteristics of how the data is output, including the following default character encodings: UTF-8 (Save as XML or HTML 4.0.1) and HTML/ASCII (Save as HTML 3.2).

Generate Bookmarks Generates bookmark links to content for HTML or XML documents. Links are placed at the beginning of the resulting HTML or XML document.

Generate Tags For Untagged Files Generates tags for files that are not already tagged, such as PDFs created using Acrobat 4.0 or earlier. If this option is not selected, untagged files are not converted.

Note: *Tags are applied only as part of the conversion process and are discarded after the conversion. This is not a method for creating tagged PDFs from legacy files.*

Generate Images Controls how images are converted. Converted image files are referenced from within XML and HTML documents.

Use Sub-Folder Specifies the folder in which to store generated images. The default is Images.

Use Prefix Specifies the prefix added to the image file names if you have several versions of the same image file. File names assigned to images have the format *filename_img_#*.

Output Format Specifies the final format. The default is JPG.

Downsample To Downsamples image files to the specified resolution. If you do not select this option, image files have the same resolution as in the source file. Image files are never upsampled.

JPEG and JPEG2000 options

If your PDF contains a collection of images, you can export them individually as JPEG, PNG, or TIFF files by choosing Advanced > Document Processing > Export All Images.

Note that the options available depend on whether you are exporting a document to JPEG or JPEG2000.

Grayscale/Color Specifies a compression setting that balances file size with image quality. The smaller the file, the lesser the image quality.

Tile Size Divides the image being compressed into tiles of the given size. (If the image height or width is not an even multiple of the tile size, partial tiles are used on the edges.) Image data for each tile is individually compressed and can be individually decompressed. The default value of 256 is recommended. This option is available only for JPEG2000 format.

Format Determines how the file is displayed. Available only for JPEG format.

- **Baseline (Standard)** Displays the image when it has fully downloaded. This JPEG format is recognizable to most web browsers.

- **Baseline (Optimized)** Optimizes color quality of the image and produces smaller file sizes but is not supported by all web browsers.

- **Progressive (3 scans-5 scans)** Downloads the image first as a low-resolution image, with incremental quality improvements as downloading continues.

RGB/CMYK/Grayscale Specifies the type of color management to be applied to the output file and whether to embed an ICC profile.

Note: *If you use the Save As or Export All Images command on a PDF that contains JPEG and JPEG2000 images, and export the content to JPEG or JPEG2000 format, the resulting image may look different when opened in Acrobat. This can happen if the images have a color profile included at the page level but not inside the image data. In this case, Acrobat cannot bring the page-level color profile into the resulting saved image.*

Colorspace/Resolution Specifies a color space and resolution for the output file. You can let Acrobat determine these settings automatically. To convert color images in the file to shades of gray, choose Grayscale.

Note: *Higher resolutions, such as 2400 pixels per inch (ppi), are suitable only for small page sizes (up to 6.826 inches or 173.380 millimeters).*

PNG options

PNG format is useful for images that will be used on the web.

Interlace Specifies if the image is interlaced. None creates an image that displays in a web browser only after downloading is complete. Adam7 creates an image that displays low-resolution versions in a browser while the full image file is downloading. Adam7 can make downloading time seem shorter and assures viewers that downloading is in progress; however, it increases file size.

Filter Lets you select a filtering algorithm.

- **None** Compresses the image without a filter. Recommended for indexed-color and bitmap-mode images.

- **Sub** Optimizes the compression of images with even horizontal patterns or blends.

- **Up** Optimizes the compression of images with even vertical patterns.

- **Average** Optimizes the compression of low-level noise by averaging the color values of adjacent pixels.

- **Paeth** Optimizes the compression of low-level noise by reassigning adjacent color values.

- **Adaptive** Applies the filtering algorithm—Sub, Up, Average, or Paeth—best suited for the image. Select Adaptive if you are unsure of which filter to use.

RGB/CMYK/Grayscale Specifies the type of color management for the output file and whether to embed an ICC profile.

Colorspace/Resolution Specifies a color space and resolution for the output file. You can let Acrobat determine these settings automatically. To convert color images in the file to shades of gray, choose Grayscale.

Note: *Higher resolutions, such as 2400 ppi, are suitable only for small page sizes (up to 6.826 inches or 173.380 millimeters).*

TIFF options

TIFF is a flexible bitmap image format supported by virtually all paint, image-editing, and page-layout applications. Resolution is determined automatically.

Monochrome Specifies a compression format. CCITTG4 is the default and generally produces the smallest file size. ZIP compression also produces a small file.

Note: *Some applications cannot open TIFF files that are saved with JPEG or ZIP compression. In these cases, LZW compression is recommended.*

RGB/CMYK/Grayscale/Other Specifies the type of color management for the output file.

Colorspace/Resolution Specifies a color space and resolution for the output file. You can let Acrobat determine these settings automatically. To convert color images in the file to shades of gray, choose Grayscale.

Note: *Higher resolutions, such as 2400 ppi, are suitable only for small page sizes (up to 6.826 inches or 173.380 millimeters).*

Export PDFs as text

If you have a PDF version of a document, but you don't have the original application file, you can export the text to Rich Text Format (RTF), a standard for exchanging content between text-editing applications, or Microsoft Word format. Images in the PDF are saved by default in JPEG format. The text file you obtain when you export a PDF to RTF or Word format is not equivalent to the source file in the authoring application. Some coding information may be lost in the conversion.

You can also export a PDF to plain text or accessible text. Accessible text follows the reading order preference selected in the Reading preferences, and includes comments and form fields in its output. Accessible text also includes some formatting, such as line breaks. Any alternate text in the document tags is used in place of images and figures. Plain text follows the structure order of text in the document and ignores all artifacts and figure elements in the conversion. Hard hyphens are preserved, and soft hyphens are removed.

1 Do one of the following:

- Click the Export button in the Tasks toolbar, and choose Word Document.
- Choose File > Save As, and then choose a text format: Microsoft Word Document (*.doc); Rich Text Format (*.rtf); Text (Accessible) (*.txt); or Text (Plain) (*.txt).

2 Click Settings, select the options you want, click OK, and click Save.

Word and RTF options

(For a list of plain text options, see the options for HTML and XML.)

Include Comments Preserves PDF comments.

Include Images Includes images in the final output. The default image format is JPEG.

Output Format Specifies the image format. Select JPEG or PNG, and then select the color space and resolution options.

Use Colorspace Specifies the color space. You can choose Color or Grayscale, or let the color space be determined automatically.

Change Resolution Downsamples images. If you do not select this option, images are created at the same resolution as in the PDF.

Downsample To Specifies the resolution for downsampling images. Images are never upsampled.

You can export multiple PDFs to RTF using the Advanced > Document Processing > Batch Processing command.

Export images to another format

In addition to saving every page (all text, images, and vector objects on a page) to an image format using the File > Save As command, you can export each image in a PDF to an image format.

Note: *You can export raster images, but not vector objects.*

1 Choose Advanced > Document Processing > Export All Images.

2 In the Export All Images As dialog box, choose a file format for the images.

By default, exported image files use the source file name.

3 Click Settings.

4 In the Export All Images As Settings dialog box, select the file settings, color management, and conversion settings for the file type.

5 For Exclude Images Smaller Than, select the smallest size of image to be extracted. Select No Limit to extract all images.

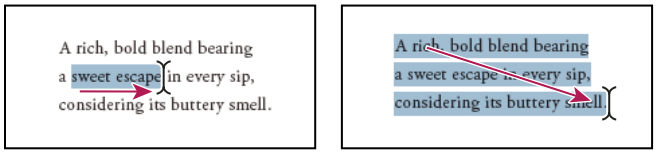
6 Click OK. In the Export All Images As dialog box, click Save or OK.

Reusing PDF content

Select and copy text

The Select tool lets you select horizontal and vertical text or columns of text in a PDF. You can use the Copy and Paste commands to copy the selected text into another application. If you hold the pointer over the text selection, a menu appears that lets you copy, highlight, or underline the text, among other options. Note the following:

- If you're unable to select text, the text may be part of an image. Export image text to text that can be selected by using either the File > Create PDF > From Scanner command or the Document > OCR Text Recognition > Recognize Text Using OCR command.
- If the Cut, Copy, and Paste commands are unavailable when you select text, the author of the PDF may have set restrictions against copying text.
- If the text you copy uses a font that isn't available on your system, the font will be substituted with a close match or a default font.



Select text by dragging from an insertion point to an end point (left) or by dragging diagonally over text (right).

See also

"Open secured PDFs" on page 247

Select a word or line of text

1 Move the Select tool over the text you want to select. When the pointer changes to the I-beam icon, do one of the following:

- Drag across the text to be selected. (You can also click to create an insertion point, and Shift-click to create a second insertion point. The text between the two insertion points is selected.)
- Double-click to select a word.
- Triple-click to select a line of text.

2 If you want to extend a selection letter by letter, press Shift and an arrow key. To extend a selection word by word, press Shift+Ctrl (Windows) or Shift+Command (Mac OS) and an arrow key.

Select a column of text

1 Using the Select tool, move the pointer toward a column of text. When the pointer changes to a vertical bar with a box superimposed, the Select tool is in column select mode.

You can force column select mode by pressing the Alt key (Windows) or the Command key (Mac OS) as you drag a rectangle over the column of text.

2 Drag a rectangle over the column of text. To select text in more than one column, drag from the beginning of the text in one column to the end of text you want to select.

Select all the text on a page

1 Choose View > Page Display > Single Page.

2 Do one of the following:

- Choose Edit > Select All.
- Select any text on the page and then press Ctrl+A (Windows) or Command+A (Mac OS).
- Click four times in the text. This method selects all the text on the page regardless of the page layout.

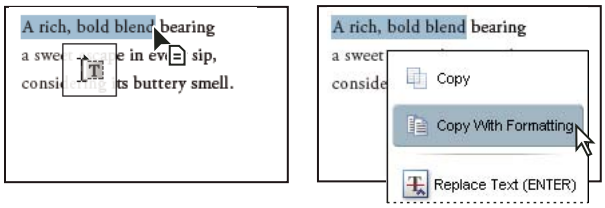
Note: *If you choose any other page layout, all the text in the document is selected.*

Copy selected text

1 Use the Select tool to select any amount of text on the page.

2 Copy the text:

- Choose Edit > Copy to copy the selected text to another application.
- Hold the pointer over the selection until a menu appears, and then select Copy.
- Hold the pointer over the selection until a menu appears, and then choose Copy To Clipboard or Copy With Formatting. (Copy With Formatting, which preserves the column layout, appears only if the document is tagged properly.)



A menu appears when you hold the pointer over selected text.

You can paste copied text into comments and bookmarks as well as into documents authored in other applications.

Copy tables and charts

1 Using the Select tool, highlight the entire table or the rows and columns to be copied.

2 Right-click/Control-click the selection, and choose one of the following options:

Copy As Table Preserves formatting when you copy the table to Excel. In Excel, use the Paste Special command and select XML Spreadsheet.

Save As Table Lets you paste the table to a new file.

Open Table In Spreadsheet Opens the table in a CSV-compliant application, such as Excel.

To copy a table in RTF, drag the selected table into an open document in the target application.

Copy images

You can copy and paste individual images from a PDF to the clipboard (Windows only), to another application, or to a file using the Select tool.

If you cannot select an image because of overlapping text, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), select General on the left, and select the Make Select Tool Select Images Before Text option.

1 Using the Select tool, do one of the following:

- To select the entire image, click it or drag a rectangle around it.
- To select a portion of an image, hold the pointer over the image until the crosshairs icon appears, and then drag a rectangle around the portion.

Note: *To deselect an image and start over, click outside it.*

2 Copy the image:

- Choose Edit > Copy, and then choose Edit > Paste to paste the image in an open document in another application.
- Right-click/Control-click the image and choose an option to copy the image to the clipboard or to a new file.
- Drag the image into an open document in another application.

See also

"Export images to another format" on page 146

Take a snapshot of a page

You can use the Snapshot tool to copy all selected content (text, images, or both) to the clipboard or to another application. Text and images are copied as an image.

1 Select the Snapshot tool by choosing Tools > Select & Zoom.

2 Do one of the following:

- Click anywhere in the page to capture the entire content displayed on the screen.
- Drag a rectangle around the text or images, or a combination of both.
- Drag a rectangle within an image to copy just a portion of the image.

Colors in the selected area are inverted momentarily to highlight the selection. The selection is copied automatically to the clipboard when you release the mouse button. If a document is open in another application, you can choose Edit > Paste to paste the copied selection directly into the target document.



You can save all the images from a PDF. See "Export images to another format" on page 146

Chapter 6: Review and comment

You can conduct reviews for many types of content by sending out an Adobe PDF version of the source document for others to review, or by posting a PDF to a shared server. Reviewers add their comments to the PDF using commenting and markup tools and then send, or upload, their comments.

If you create documents in Microsoft Word for Windows or Autodesk AutoCAD, you can import comments directly into the source document to revise the content.

Quickstart

The following steps provide a quick overview of common review and commenting tasks.

Start an email review

An email-based review lets you track review status and merge received comments into the PDF.

1 Click Review & Comment and choose Attach For Email Review.

2 If prompted, enter your identity information to create a reviewer profile.

3 Follow the on-screen instructions to select the PDF, invite reviewers, and send the email invitation.

If your email application doesn't send email automatically, you may need to answer alert messages and switch to your email application to finish sending the message.

See also

"Start an email-based review" on page 158

Start a shared review

A shared review allows reviewers, including those using Adobe Reader, to see and respond to others' comments during the review.

Important: *To conduct a shared review, you and your reviewers need write access to a shared comment server.*

1 Click Review & Comment and choose Send For Shared Review.

2 If prompted, enter your identity information to create a reviewer profile.

3 Follow the on-screen instructions to select (or add) a server, select the PDF, invite reviewers, and send the email invitation.

See also

"Start a shared review" on page 157

Invite additional reviewers

If you initiated a review, you can invite more reviewers. If you are a reviewer, ask the initiator to add reviewers so the initiator can track all reviewers and receive notification when comments are received.

1 Click Review & Comment, and choose Review Tracker.

2 Select the desired PDF under Reviews I've Sent, and click Add Reviewers.

3 Follow the on-screen instructions to add email addresses, change the message as needed, and send the invitation.

See also

"Invite additional reviewers" on page 160

Track and manage reviews

The Review Tracker provides information for all documents that you've sent and received for review. Use the Review Tracker to rejoin a review, send a reminder, or invite additional reviewers.

1 Click Review & Comment, and choose Review Tracker.

2 Select the desired PDF on the left.

3 Do any of the following:

- To rejoin a review, double-click the PDF.
- To send a message, click Email All Reviewers or Email Initiator.
- To invite additional reviewers, click Add Reviewers.

See also

"Tracking PDF reviews" on page 165

Start a meeting

If you have an Adobe Acrobat Connect account, you can start a meeting to review PDFs in a web browser. You can also create a trial account to start a meeting.

Note: *Acrobat Connect is not available in all languages.*

1 Click Start Meeting in the Tasks toolbar.

2 Click Log In, and then type your Meeting URL, login, and password. (Or click Create Trial Account and follow the on-screen instructions.)

3 Click Send An E-mail Invitation or Share My Screen.

See also

"Start a meeting" on page 160

Participate in an email review

When you open the PDF attachment in an email review, a tracked copy of the PDF opens with a document message bar, a Send Comments button, and a Comment & Markup toolbar.

Important: *If you're prompted to connect to a server when you open the PDF, you've been invited to a shared review.*

1. Open the PDF attachment from your email application.
2. Use commenting tools to add comments.
3. Save the PDF, and then click Send Comments.

See also

"Review a PDF" on page 161

Participate in a shared review

When you open the shared PDF, commenting tools and a document message bar with instructions also open.

1. Open the PDF attachment or link.
2. Click Connect, and type your login name and password, if prompted.
3. Type your name, email address, and job title to create a reviewer profile, if prompted.
4. Add comments.
5. When you want to share your comments, click Publish Comments.

In a shared review, you can see all reviewers' comments that have been published.

See also

"Review a PDF" on page 161

Add a sticky note

The sticky note is the most common type of comment.

1. Click Review & Comment in the Tasks toolbar, and then choose Add Sticky Note.
2. Type your comment in the pop-up note. (Your comment remains if you close the note.)
3. (Optional) Drag the sticky note icon or pop-up window to a new location.

You can also add other types of comments, such as markups and text edits.

See also

"Add a sticky note" on page 172

Mark up text with edits

Add editing markups to indicate where text should be inserted, deleted, or replaced.

1. Click Review & Comment, and choose Comment & Markup Tools > Text Edits Tool.
2. Select the text you want to edit or place the insertion point where you want to add text.
3. Move the pointer over the icon that appears, and choose an option from the pop-up menu, or simply begin typing.

See also

"Mark up text with edits" on page 173

Create drawing markups

You can add lines, arrows, and shapes to a PDF by using the drawing markup tools.

1 Choose Tools > Comment & Markup, and choose the desired tool.

2 Draw in the PDF. For example, click and drag to form a line, arrow, or rectangle.

3 (Optional) Using the Select tool, double-click the markup, and then type a comment in the pop-up note.

To change properties, such as line color and width, right-click/Control-click the markup and choose Properties.

See also

"Add a line, arrow, or shape" on page 177

Preparing for a PDF review

Choosing a review type

While you can send out a PDF for review through email, it's easier to set up a managed review using a wizard. That way you don't have to do the work of importing comments, enabling commenting for Adobe Reader users, or manually tracking reviewer responses.

Note: *Acrobat Professional is required to enable commenting for Adobe Reader users in shared reviews and email-based reviews.*

Acrobat includes three types of managed reviews. Each type of review has a wizard that helps you distribute a PDF with special tools and instructions to reviewers. The Review Tracker tracks all managed reviews and provides access to the PDF file and to information about the review and its participants.

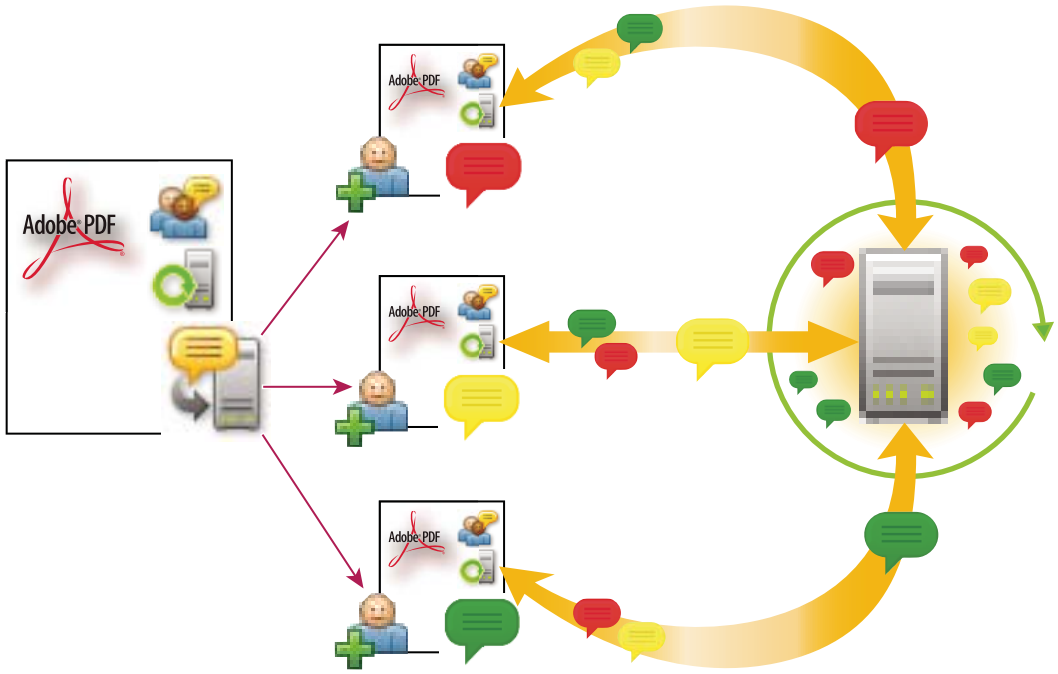
Shared reviews and email-based reviews are the best choices for most document reviews. To initiate any managed review, you need a supported email application and a mail server connection. (No additional server software is required for shared or browser-based reviews.) In addition to managed reviews, Acrobat offers a meeting option that lets you share your desktop with others to collaborate on documents. (See "Start a meeting" on page 160.)

Shared reviews

Shared reviews are best for groups that work behind a firewall and have access to a remote server. Shared reviews are the most collaborative form of review because participants can read and reply to each other's comments whether they review the PDF locally, as an email attachment, or on a remote server. Reviewers outside the firewall can also participate by sending their comments to a reviewer within the firewall, who then publishes them to the shared PDF.

Of all the managed reviews, shared reviews provide the most detailed information about the active review. A notification feature lets you know when new comments are available, even when Acrobat is closed, and you're informed of all recent review activity each time you open the PDF. Published comments are saved to the server and to the local hard drive, and Acrobat synchronizes comments between these two locations at regular intervals to download all the latest comments and changes.

Note: *To view other reviewers' comments in a shared review, you must use Acrobat 8 or Adobe Reader 8. Reviewers using Acrobat 6.0 or 7.0 must send their comments in email. Shared reviews do not support commenting in Acrobat 3D files.*



In a shared review, the PDF file contains special information that lets recipients easily join the review and share their comments.

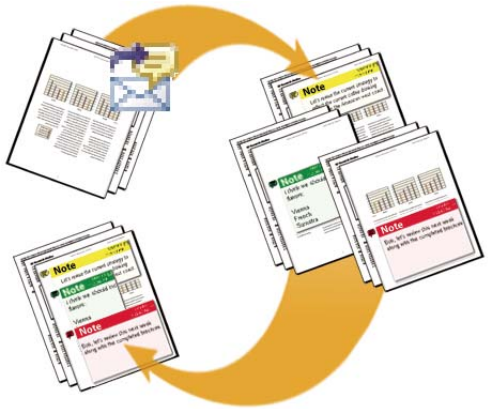
Email-based reviews

Email-based reviews are ideal for soliciting feedback from individuals who either don't have access to a remote server or who don't require a collaborative approach to reviewing documents.

In an email-based review, the initiator sends a PDF to reviewers as an email attachment. Reviewers add their comments to the PDF and return the document by using the Send Comments button in either the Comment & Markup toolbar or the document message bar. When receiving these comments, the initiator can merge them into their copy of the PDF.

The primary limitation to email-based reviews is that participants can't view each other's comments during the review. Initiators can view comments only after receiving them.

Note: *Acrobat 6.0 or later or Adobe Reader 7.0 or later is required to participate in an email-based review.*



In an email-based review, participants send their comments to the initiator, who merges the comments into the master copy of the PDF.

Browser-based reviews

Like shared reviews, browser-based reviews are suitable for collaborative groups with access to a shared server. Reviewers can view each other's comments during the review process. In a browser-based review, the initiator uploads a PDF to the server and then sends an email invitation to reviewers. The invitation includes a setup file that, when clicked, opens the PDF in the default browser. Reviewers click the Send Comments button in the Comment & Markup toolbar to upload their comments, which are stored in a comments repository on the shared server.

Browser-based reviews lack many of the advantages of shared reviews in terms of setup and tracking tools, and support for network folders. In addition, Acrobat must download all comments in the PDF each time you join the review, often a time-consuming process. For these reasons, Adobe recommends shared reviews as the preferred collaborative method.

Note: *Acrobat 6.0 or later is required to participate in browser-based reviews. (Adobe Reader users cannot participate.)*



In a browser-based review, the initiator uploads a PDF to the server and sends a setup file to the reviewers, who can see each other's comments.

Enable commenting for Adobe Reader users

By enabling commenting rights in a PDF, Adobe Reader 8 users can participate in reviews of that PDF. When a PDF with commenting rights opens in Reader, it includes a document message bar, a How To pane with instructions, and commenting tools that are otherwise unavailable.

❖ Use either of these methods to enable commenting for Reader users:

- In an open PDF, choose Comments > Enable For Commenting In Adobe Reader, and then save the PDF.
- Start the wizard to initiate a shared review or an email-based review and follow the on-screen instructions. When you're finished, commenting is enabled in the PDF that you specify for the review.

See also

"Start a shared review" on page 157

"Start an email review" on page 150

Select an email application for reviews

You need an email application and a mail server connection to send a PDF for review and to send comments. Acrobat supports most email applications. If more than one email application is installed on your system, Acrobat might not start the preferred application when it sends a PDF as an attachment. To specify which application starts, do one of the following:

- (Windows) Double-click Internet Options in the Control Panel. In the Internet Properties dialog box, select the Programs tab, and then select the preferred email application. Restart Acrobat for the changes to take effect.
- (Windows) Change the MAPI settings in your email application. Adobe Reader uses the Messaging Application Program Interface (MAPI) to communicate with your email application. Most email applications come with MAPI settings to handle this communication. For more information on configuring your email applications, see the email application's Help.
- (Mac OS) In Mail, choose Mail > Preferences, select General, and then choose the preferred email application from the Default Email Reader menu. Restart Acrobat for the changes to take effect. If your application isn't listed, choose Select from the menu and browse to the location. If you select an application that isn't listed in the Default Email Reader menu, Acrobat may not support it.

After you verify that Acrobat works with your email application, you can initiate a review.

Specify a server for comments

You must specify a server location to store all the comments that are submitted during a shared review or a browser-based review. This server location is referred to as the *comment server* (also called a *comments repository*). Reviewers must have read and write access to the comment server you specify. Ask your network administrator to provide a suitable server location for storing comments. No additional software is required to set up a comment server.

For a shared review, you can specify a network folder, a WebDAV server, or a Windows server running Microsoft SharePoint Services. If all reviewers are within a local area network, network folders and SharePoint servers are the best choices for a comment server—network folders being the cheapest and most reliable. To initiate a review on a SharePoint server, the initiator must use Windows; however, reviewers can use either Windows or Mac OS. All participants must have read and write access to the Document Library folder within the specified workspace. WebDAV servers (web servers that use the WebDAV protocol) are best used only if you have reviewers that are outside of a firewall or local area network.

For a browser-based review, you can specify either a network folder or a WebDAV server. If you use a network folder, comments may not be viewable to reviewers on both platforms. Even if all reviewers use the same platform, they may not see comments if they access the server location as a mapped drive instead of by its full file path. If you use a WebDAV server, make sure that all reviewers have unique login names that aren't differentiated solely by case.

Specify a server for shared reviews

❖ Start the wizard to initiate a shared review, click Add Folder, and follow the on-screen instructions.

Specify a server for browser-based reviews

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Reviewing from the list on the left.

2 For the Online Comments Repository, choose a server type from the menu.

3 To specify the server settings, do one of the following, and then click OK:

- Click Browse (Windows) or Choose (Mac OS) to select a network folder, and then click OK.

- Type the path in the Administrator Provided Server Settings box. For example, type a WebDAV server using a web address (such as http://server/folder), or a network folder using a UNC (Universal Naming Convention) address (such as \\server\folder).
- If your organization subscribes to automatic configuration services, click Configure Automatically.

If the server information changes for subsequent reviews, you must respecify the location.

Starting and managing a review

Start a shared review

To conduct a shared review, you and your reviewers must have read and write access to the server you use for storing comments. (See "Specify a server for comments" on page 156.)

The shared PDF that you send includes the Comment & Markup toolbar and instructions in the document message bar.

1 Start the setup wizard for a shared review:

- Click the Review & Comment button in the Task toolbar and choose Send For Shared Review.
- Choose Comments > Send For Shared Review.

2 If prompted, type your name, email address, and job title in the Review Profile dialog box, and click OK.

3 Choose the shared location that you'll use to store comments, or click Add New Location. If you set up a new location, type a descriptive name, specify the type of server (network folder, SharePoint workspace, or WebDAV folder), and click Next. Type the full path of the folder location, using the examples in the screen, or browse to select the folder. Verify that you have write access to that location, and then click Add Folder and click Next.

The option to enable commenting for Reader users is selected by default.

4 Select the PDF to be reviewed, and then specify whether to send it as an email attachment, or to post it on the network and send an email invitation with a URL. If you want to distribute the PDF later or use a different method (such as FTP), select the option to save a copy to your local hard drive. Click Next.

5 Specify reviewers by typing their email addresses, or by clicking Address Book and selecting email addresses from a Lotus Notes or Microsoft Outlook address book. Insert a semicolon or a return between each address. If you want to specify a date when the review ends, select Set Deadline, and enter the month, day, and year. Click Next.

6 Review the invitation, and then click Finish.

The shared PDF now contains the following information: the email addresses of reviewers, the path to the shared folder, and the initiator's profile. No matter when or how you send this PDF, each recipient gets this information, which appears in the Welcome screen with news of recent activity when the PDF is opened.

7 If you're sending the shared PDF as an email attachment and your email application doesn't let you send email automatically for security reasons, answer any alert messages that this application might return, and send the message.

If you distribute the shared PDF after the review has started, any review comments that have been published up to that point will appear in the file, even if the recipient doesn't have access to the comment server.

See also

"Save the PDF with comments" on page 166

Start an email-based review

When you start an email-based review, you send out a tracked copy of the PDF, enabling you to easily merge comments that you receive. (Form fields in a PDF aren't fillable during the review.)

Start the review

Before you start an email-based review, make sure that your email application is configured to work with Acrobat. (See "Select an email application for reviews" on page 156.)

1 Start the email-based review wizard by using any of these methods:

- Click the Review & Comment button in the Task toolbar and choose Attach For Email Review.
- Choose Comments > Attach For Email Review.

You can also start an email-based review directly from other applications that use PDFMaker, such as Microsoft Word. Choose Adobe PDF > Convert To Adobe PDF And Send For Review, or click the Convert To Adobe PDF And Send For Review button. For Office 2007 applications, choose Acrobat > Create And Send For Review.

2 If prompted, enter information in the Identity Setup dialog box.

3 Specify a PDF if it isn't already open, and then click Next. The PDF that you specify becomes the master file. You'll merge comments you receive from reviewers into this file.

4 Specify reviewers by typing their email addresses, or by clicking Address Book and selecting email addresses from a Lotus Notes or Microsoft Outlook address book. Insert a semicolon or return between each address.

5 To specify that persons other than yourself receive the review comments, click Customize Review Options and type the email addresses of those individuals in the Request That Reviewers Return Their Comments To box. Click OK.

The option to enable commenting for Reader users is selected, by default.

6 Click Next to preview the email invitation, and then click Send Invitation. If your email application doesn't let you send email automatically for security reasons, answer any alert messages that this application might return, and send the message.

A copy of the PDF is sent to the reviewers as an attachment. When reviewers open this file attachment, Acrobat presents commenting tools and a PDF that provides instructions.

Merge comments

After you receive comments from reviewers, you can merge the comments into the master PDF so that they're in one location.

1 After a reviewer sends you comments, open the attached file in your email application. If the email application can't find the original version of the PDF, it prompts you to browse for it.

Note: *If you didn't initiate the review and you receive comments that you want to forward to the initiator, merge these comments into your copy of the PDF and then send them (see "Send comments in email" on page 164). If you've already sent your comments, the initiator will receive only new comments. Merged comments retain the original author name.*

2 If you initiated the review, the Merge Comments dialog box appears. Select one of the following options:

Yes Opens the master copy of the PDF and merges all comments into it. After comments are merged, save the master PDF.

No, Open This Copy Only Opens the reviewer's copy of the PDF with comments. If you select this option, you can still merge comments by choosing Comments > Merge Comments Onto Master PDF.

Cancel Closes the reviewer's PDF that contains comments.

You can hide comments that you don't want to merge by using the Sort menu in the Comments list. Save and reopen the PDF, and then select Yes in the Merge PDF dialog box.

Start a browser-based review

When you initiate a browser-based review, a PDF is uploaded to a server, and reviewers receive an email message with a setup file in Forms Data Format (FDF). When reviewers click this file, the PDF opens in the default web browser and review settings are configured to enable comments to be uploaded to the remote server. Uploaded comments are stored as an FDF file in the *comments repository,* an online location that is accessible to all reviewers. You can set up the comments repository on the same or a different server as the uploaded PDF.

Note: *Add comments to the PDF after you upload it to the server. If you add comments to the PDF before you upload it to the server, the comments are embedded in the PDF, and you can't edit them later.*

1 Specify the comments repository in the Reviewing preferences. (See "Specify a server for comments" on page 156.)

2 Start the setup wizard by choosing Comments > Upload For Browser Review.

3 If you're prompted to enter information in the Identity Setup dialog box, do so.

4 Specify the PDF to upload, and then click Next.

5 Select a server, using either of these methods:

- Type the path for the server location in the text box, and click Next.
- Click Browse (Windows) or Choose (Mac OS) to select a network folder, click Save, and click Next.

You can upload the PDF to a WebDAV server using a web address (such as http://server/folder), or to a network folder using a UNC (Universal Naming Convention) address (such as \\server\folder).

6 In the Invite Reviewers box, specify reviewers by typing their email addresses, or by selecting email addresses from a Lotus Notes or Microsoft Outlook address book. Insert a semicolon or return between each address. Click Next.

7 Edit the invitation message as necessary, and then click Send Invitation.

8 If your email application doesn't let you send email automatically for security reasons, make the email application active, answer any alert messages that this application might return, and send the message.

9 To make sure that the setup is correct, add a comment to the document, and then click the Send And Receive Comments button in the Comment & Markup toolbar. If your comments aren't uploaded to the server, your Reviewing preferences settings are likely incorrect. Contact your network administrator for assistance.

See also

"Save the PDF with comments" on page 166

Invite additional reviewers

If you're the review initiator, you can invite others to participate in the review. If you're a reviewer and want other people to participate, ask the review initiator to invite them. That way, the initiator can automatically track all participants and receive notification when their comments are received.

1 Do one of the following:

- Choose Comments > Invite Additional Reviewers.
- Choose Comments > Review Tracker, select the PDF, and then click Add Reviewers on the right.

2 Specify the email addresses of the reviewers to be added, change the message as needed, and then send the message.

Additional reviewers appear with other participants in the right pane of the Review Tracker.

Send a message

During a review, you may want to contact other reviewers or send them a reminder of their approaching deadline.

1 Do one of the following:

- Choose Comments > Send Review Reminder.
- Choose Comments > Review Tracker, select the PDF, and click Email All Reviewers.

2 In the email message, make changes as needed to the To and Subject boxes or in the body of the email message, and then click Send.

Meetings

Start a meeting

From Acrobat, you can start a meeting to share your desktop and review PDF documents. Adobe Acrobat Connect is a personal web-conference tool that you can access from Acrobat to conduct real-time meetings on your desktop. Attendees join the meeting by logging into a web-based meeting space from their own computers.

You must have an Acrobat Connect account to start and attend meetings. You can subscribe or set up a trial account by clicking the Start Meeting button in Acrobat to get started.

Note: *Acrobat Connect is not available in all languages.*

1 To start a meeting, do one of the following:

- Click the Start Meeting button.
- Choose File > Start Meeting.

2 In the dialog box that appears, do one of the following:

- If you have an account, click Log In. Type the Meeting URL, login, and password for your Acrobat Connect account, and then click Log In. Your Acrobat Connect account uses your Adobe ID (your email address) for your login.

Note: *You can also use Meeting URLs for Macromedia Breeze® and Adobe Acrobat Connect Pro accounts. These accounts require a login that is different than your Adobe ID.*

- If you don't have an account, click Create Trial Account, and follow the on-screen directions.

3 Do one of the following:

- To invite participants to a meeting, click Send An E-mail Invitation, type the email addresses of those you want to invite, and then click Send.
- To share the document that's displayed on your screen, click Share My Screen.

As participants join the meeting, their names appear in the Attendee List.

4 Do any of the following:

- Type a message in the Chat pod, select who to send the message to, and click the Send Message button.
- Take notes in the Notes pod and send them out after the meeting.
- If you want another attendee to share his or her desktop, select that person's name in the Attendee List, click the Set User Role button, and choose Set As Presenter.

Attend a meeting

If you don't have an Acrobat Connect account, you can join a meeting as a guest.

Note: *Acrobat Connect is not available in all languages.*

1 In the email invitation, click the URL for the meeting or type the Meeting URL in the address box of a browser.

2 Type the login and password for your Acrobat Connect account, or log in as a guest.

3 In the Acrobat Connect meeting, do any of the following:

- To send a message, type it in the Chat pod, select who to send it to, and click the Send Message button.
- To clear the Chat pod or change the font size, click the Pod Options button and choose an option.
- To take notes, type them in the Note pod.

Acrobat Connect preferences

When you start an Acrobat Connect meeting, the Meeting URL and login you provide are stored in the Acrobat Connect preferences. To change your Acrobat Connect account settings, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Meeting on the left.

The login for your Acrobat Connect account is your Adobe ID. To change your login, create a new Adobe ID on the Adobe website.

Note: *Acrobat Connect is not available in all languages.*

Participating in a PDF review

Review a PDF

When you receive an email invitation to a PDF review, the invitation typically includes the PDF as an attachment or provides a URL to the PDF. Alternatively, you may receive a Forms Data Format (FDF) attachment. When opened, an FDF file configures your review settings and opens the PDF in a web browser.

PDFs in a review have special features, including commenting tools and a document message bar with instructions. Use the commenting tools to add comments to the PDF and then submit them, either by publishing comments to a comment server where others can see them, or by sending comments as an email attachment to the review initiator.

Note: *If you receive a PDF that doesn't include special features, add your comments using tools from the Comment & Markup toolbar, save the PDF, and then send it back. (See "Commenting and markup tools overview" on page 168.)*

To review the PDF later, reopen it from the Review Tracker to ensure that your comments are added to the tracked copy of the PDF, and that the initiator receives your comments. If you don't send or publish your comments right away, save the PDF before you close it to avoid losing your comments. Until the initiator receives your comments, they appear only in your local copy of the PDF and aren't visible to other reviewers.

If you review a PDF using a version earlier than Acrobat 8 or Reader 8, some features may not be available.

See also

"Reply to comments" on page 182

"Rejoin a review" on page 165

"Save the PDF with comments" on page 166

Join a review

1 In your email application, open the PDF by double-clicking the attachment (PDF or FDF) or URL.

2 Do one or more of the following, if prompted:

- Click Connect in the Join Shared Review dialog box.
- Click OK in the Welcome To Shared Review window. This window tells you who's invited to the review and if they've made any comments, and it tells where the comment server is located.
- Type your login name and password for the comment server. If you don't have access to the comment server, click Work Offline, or click Save And Work Offline in the Comment & Markup toolbar.
- Type your name, email address, company name, and job title, if prompted.

3 Save the file to a location that you can find easily, such as the desktop.

4 Add comments to the PDF using tools in the Comment & Markup toolbar. If you need to delete a comment, select it and press Delete. (You can delete only comments that you made.)

5 Do all of the following that apply:

- If you're notified that new comments from other reviewers are available, click the message. New comments appear in the PDF.
- If you want to find out if new comments are available from other reviewers, click the Check For New Comments button .

6 Submit your comments by doing one of the following:

- Click Publish Comments in the document message bar.
- Click Send Comments or Send And Receive Comments in the Comment & Markup toolbar.
- Choose Comments > Send Comments To Review Initiator.

When you send comments, a PDF containing your comments is sent as an email attachment to the review initiator. When you publish comments, your comments are saved to the comment server.

Options in the document message bar

The options that are available in the document message bar depend on how the initiator set up the review and whether you can access the comment server. Similar options may also appear in the Comment & Markup toolbar.

For information about the different types of reviews, see "Choosing a review type" on page 153.

Check For New Comments Prompts Acrobat to synchronize comments between the comment server and the local hard drive. If you don't click this button, Acrobat checks for new comments at the intervals specified in the Reviewing preferences. This button is available only when new comments are published to the server in a shared review.

Merge Comments Copies the comments in the open PDF to your copy. This option is available only for PDFs you receive from reviewers in email-based reviews.

Publish Comments Uploads your new comments to the comment server. This option is available only in shared reviews.

Send Comments Creates an email message addressed to the review initiator that contains the commented PDF as an attachment. This option is always available in email-based reviews, and it appears in shared reviews only after an attempt to connecting to the comment server has failed.

Status Displays the connected state of the comment server. If clicked, a menu with additional options appears. Review Tracker opens the Review Tracker. Save As Archive Copy saves a copy of the PDF that is no longer connected to the review. Work Offline saves a copy of the PDF that is temporarily disconnected from the review. Reconnect To Server appears only in the PDF you created by choosing Work Offline.

Check for newly published comments

When you participate in a shared review, Acrobat synchronizes published comments on your local drive with those on the comment server, and then notifies you when new comments are available. Notifications appear as bezel-style messages in the open PDF. In Windows, notifications also appear as balloon-style messages in the notification area (system tray). Because synchronization continues after the PDF is closed, you'll continue to receive notifications.

Messages in the notification area inform you when new reviewers join the review, when updates occur (multiple reviews), and when synchronization attempts fail. They also inform you when a new broadcast subscription is added in the Review Tracker. You can change how often messages appear and how often comments are synchronized, and you can manually trigger the synchronization process.

View new comments

To view new comments, you must be able to connect to the network where the comment server is located. If you can't connect, check the server status in the Review Tracker to determine the cause of the problem. (See "Check server status" on page 167.)

❖ Do one of the following:

- Click the Check For New Comments button in the document message bar.
- Choose Comments > Check For New Comments.
- Click the message in the notification area (Windows).

Change frequency of synchronization and notifications

1 Open the Reviewing preferences:

- Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then click Reviewing on the left.
- In Windows, right-click the notification icon in the notification area, and choose Reviewing Preferences.

2 Move the sliders to change the following settings:

Check For New Comments The top slider specifies (in minutes) how often comments are synchronized when a shared PDF is open. The bottom slider specifies (in hours, weeks, days, or months) how often comments are synchronized when a shared PDF is closed.

Show Review Tracker Alerts Specifies how often alert messages appear.

Disable notifications

❖ Do one of the following:

- Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), click Reviewing on the left, move the slider for Show Review Tracker Alerts to the far left until the value Never appears, and then click OK.
- In Windows, right-click the notification icon in the notification area. If a check mark appears next to Show Review Notifications, select that option so a check mark no longer appears.

Send comments in email

If you review a PDF offline or outside of a firewall, or if you lose your connection to the comment server, you may need to send your comments in an email message.

❖ Do one of the following:

- Click the Email button in the toolbar. Type the initiator's email address in the To text box, type the message, and click Send.
- Choose File > Attach To Email, type the initiator's email address, and click Send.
- Click the Send Comments button in the Comments & Markups toolbar, type the address for the initiator in the To text box, and click Send.

Note: *If the PDF exceeds the 5 MB file-size limit, you're prompted to send your comments in a smaller Forms Data Format (FDF) file, which the initiator can import. To adjust the limit, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), select Reviewing, and enter the new value for Send Comments As FDF For Files Greater Than [#] MB.*

Publish comments from other reviewers

When you participate in a review, you may receive comments from other reviewers. If a reviewer can't access the comment server, they may send you their comments. If you solicited feedback from individuals who weren't initially invited to the review, they may return a copy of the review PDF to you with their comments. By taking ownership of the comments, you can share them with everyone in the review.

Note: *If you publish comments from a reviewer who later gains access to the comments server, those comments may appear in the PDF in duplicate.*

1 Open the PDF that contains comments.

2 Do one of the following:

- Click OK when asked if you want to publish comments for this reviewer. The published comments appear in the PDF. Your name appears in the title bar and the author's name appears in the body of the comments, preceded by the text "On behalf of."
- Click Yes when asked if you want to merge comments, or click Merge Comments in the document message bar and then click Send Comments. Add email addresses for other reviewers, as needed, and then click Send.

- Choose Comments > Import Comments, and then click Send Comments. Add email addresses for other reviewers, as needed, and then click Send.

Only new or edited comments are published or sent.

Rejoin a review

Use the Review Tracker to reopen PDFs in an active review. If you received a PDF attachment with an email message and didn't save it the first time you opened it, reopen the PDF in your email application. Only PDFs that you've saved appear in the Review Tracker.

1 Choose Comments > Review Tracker.

2 In the Review Tracker, double-click the PDF.

In shared reviews, the Welcome Back To Shared Review window shows the number of new comments that were published since the last time you opened the PDF. Click OK to close this window.

3 Add new comments or edit existing comments. If you need to delete a comment, select it, and press Delete.

Deleted comments are removed from the online PDF the next time comments are synchronized or the browser window is refreshed. If you delete comments that you sent in an earlier email message, they aren't deleted in the initiator's document.

4 Submit your new comments by doing one of the following:

- Click Publish Comments in the document message bar.
- Click Send Comments or Send And Receive Comments in the Comment & Markup toolbar.

Only new or edited comments are published or sent.

See also

"Save the PDF with comments" on page 166

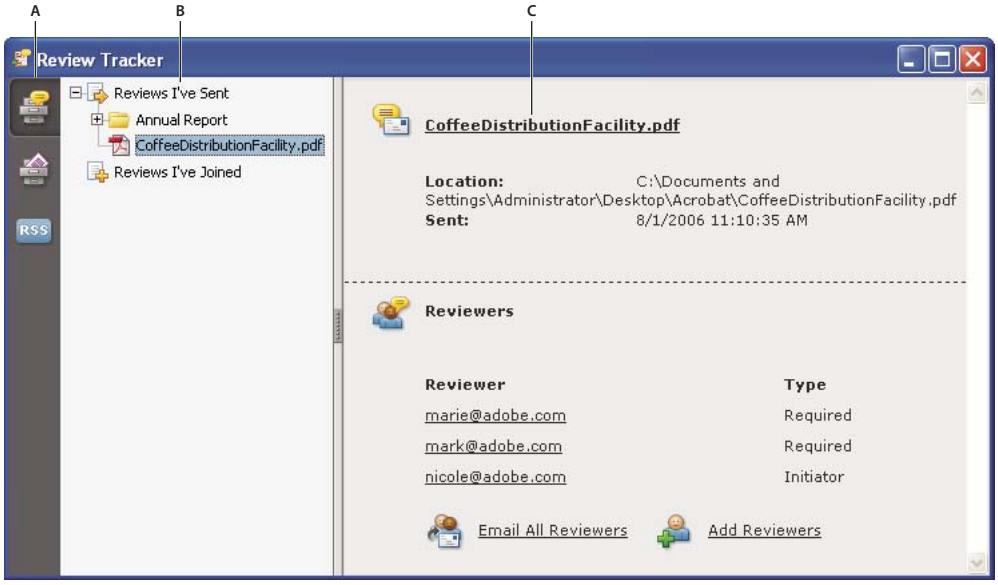
Tracking PDF reviews

Review Tracker overview

You can use the Review Tracker to manage your document reviews. From this window, you can see who's joined a shared review and how many comments they've published. You can also rejoin a review, access comment servers used in reviews, and email participants.

The Review Tracker includes links to all PDF documents in managed reviews. Each link lists the date and time the PDF was sent and the list of invited reviewers. Links to shared PDFs provide additional information, including the deadline (if set) and the number of comments submitted per reviewer. Deleting a link in the Review Tracker doesn't delete the PDF file.

In addition to the Review Tracker panel, the Review Tracker includes two other panels where you can manage forms and web broadcast subscriptions (known as *RSS feeds*). You can access these panels by clicking the Forms button or the Subscriptions button on the left side of the window.



Review Tracker
A. *Review Tracker icon* ***B.*** *Reviews you initiated or received* ***C.*** *Information for the selected review*

Open the Review Tracker

❖ Do one of the following:

- Choose Comments > Review Tracker.
- Click the Review & Comment button in the Task toolbar, and choose Review Tracker.

If you're participating in a shared review, you can open the Review Tracker by clicking the Status button menu in the document message bar of the shared PDF.

Track reviewed PDFs

1 Choose Comments > Review Tracker.

2 Expand the appropriate folder:

Reviews I've Sent Lists PDFs in reviews that you initiated.

Reviews I've Joined Contains PDFs in reviews that you've received. PDFs appear in this list only after you open them.

Note: *PDFs listed in bold contain comments that you haven't yet read.*

3 Select a PDF.

Information specific to the selected PDF review appears on the right. Shared reviews open a summary page that lists reviewers who have joined the review and the number of new comments.

Save the PDF with comments

You can save a copy of the review PDF that contains all the comments that reviewers have published or that you've imported (merged).

If the PDF is in a shared review, you can save an archive copy. The copy is no longer connected to the shared review, and you can edit both content and comments in it.

If you want to create a copy of a shared PDF to distribute to others, use the Save As command. The resulting file will include all comments that were published up to that point, and it can be moved, copied, or renamed without affecting its connection to the review or to the comment server.

❖ To save a copy of a review PDF with all the comments, open the file, and then do one of the following:

- For a shared review, choose File > Save As Archive Copy, or click the Status button in the document message bar and choose Save As Archive Copy.
- For an email-based review, choose File > Save As to save a new copy of the PDF. This most recently saved version is now the tracked PDF. The old version is the archive copy.
- For a browser-based review, use the Save And Work Offline button in the Comment & Review toolbar to save a copy of the PDF with all the comments to the local hard drive.

Check server status

Check the server status in a shared PDF or in the Review Tracker to determine if you can connect to the comment server.

Check status in a shared PDF

The Status button in the document message bar indicates whether the last attempt to connect to the comment server was successful.

1 Open the shared PDF.

2 In the upper-right corner of the document, the Status button displays either the last attempt successful icon, the last attempt unsuccessful icon, or the attempting to connect icon.

Check status in the Review Tracker

1 Choose Comments > Review Tracker.

2 On the left, click the plus sign (+) next to Review Servers to expand the list.

The green icon next to the server name indicates that the last synchronization attempt was successful. The red icon indicates that the last synchronization attempt was unsuccessful. The server may be disconnected from the network, it may have problems writing data to the disk, or it may have some other problem. Contact your network administrator for help.

Update your profile

Your comments identify you as the author by displaying your name—the name you provided when you joined or started a review, or your system login. You can change the author name and other profile information at any time. If you do, your updated profile appears only in new comments; existing comments aren't affected.

Update your review profile

You can also update your review profile from the Welcome Back To Review window that appears when you rejoin a shared review.

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

2 To change your author name, select Commenting from the list on the left, and deselect Always Use Log-In Name For Author Name.

3 Select Identity from the list on the left.

4 Edit your profile, making sure to include the email address that you'll use for reviews. Click OK.

Update your profile for a shared review

1 Open the shared PDF.

2 In the Welcome screen that appears, click the Edit button for Reviewer Profile.

3 Edit your profile, making sure to include a valid email address, and click OK.

If you change the name in your profile, it will appear twice—in the list of invited participants, and in the list of uninvited participants.

Subscribe to web broadcast services

You can use the Review Tracker as a news reader by subscribing to web content that uses the RSS (Really Simple Syndication) format, such as news feeds or music channels. RSS format is compatible with XML and RDF formats.

1 Do one of the following:

- Click the Subscriptions button RSS on the left side of the Review Tracker. Click the Subscribe button, enter a web address in the URL box, and then click OK.
- Click the link for an RSS service.

2 If a security warning prompts you to approve the link, click OK.

Commenting

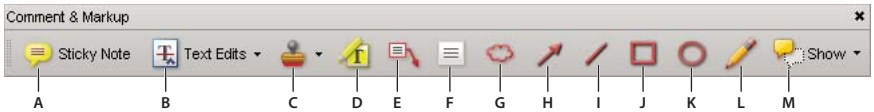
Commenting and markup tools overview

You use commenting and markup tools (View > Toolbars > Comment & Markup) to add *comments*. Comments are notes and drawings that communicate ideas or provide feedback for PDFs. You can type a text message using the Sticky Note tool, or you can use a drawing tool to add a line, circle, or other shape and then type a message in the associated pop-up note. Text-editing tools let you add editing marks to indicate changes you want in the source document. Most commenting and markup tools don't appear in the toolbar until you add them.

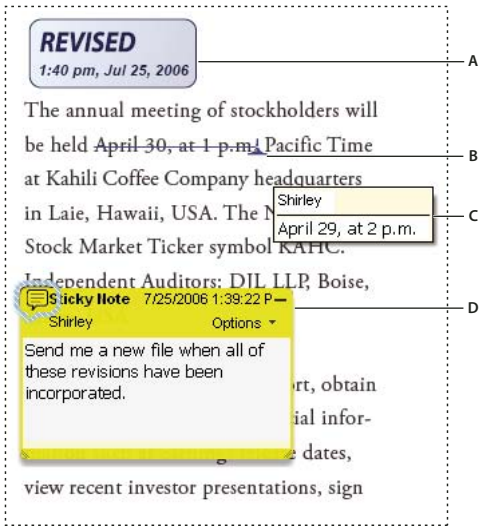
Most comments include two parts: the icon, or *markup*, that appears on the page, and the text message that appears in a pop-up note when you click or double-click the icon or place the pointer over the icon.

After you add a comment, it stays selected until you click elsewhere on the page. A selected comment is highlighted by a blue halo to help you find the markup on the page. A wireframe with selection handles appears so you can adjust the size and shape.

You can add tags to your comments so that readers with motion or vision limitations can read them using assistive technologies.



Comment & Markup toolbar
A. *Sticky Note tool* ***B.*** *Text Edits tool* ***C.*** *Stamp tool and menu* ***D.*** *Highlight Text tool* ***E.*** *Callout tool* ***F.*** *Text Box tool* ***G.*** *Cloud tool* ***H.*** *Arrow tool* ***I.*** *Line tool* ***J.*** *Rectangle tool* ***K.*** *Oval tool* ***L.*** *Pencil tool* ***M.*** *Show menu*



Types of comments in a PDF
***A.** Stamp **B.** Text edit **C.** Comment rollover (tool tip) **D.** Sticky note*

See also

"Show and hide toolbar elements" on page 22

"Add tags to comments" on page 318

"Comment on 3D designs" on page 400

Show the Comment & Markup toolbar

The Comment & Markup toolbar doesn't appear by default, except when you open a PDF in a managed review workflow.

❖ Do one of the following:

- Choose View > Toolbars > Comment & Markup.
- Choose Comments > Show Comment & Markup Toolbar.
- Choose Tools > Comment & Markup > Show Comment & Markup Toolbar.
- Click the Review & Comment button in the Task toolbar, and choose Show Comment & Markup Toolbar.

To add or remove tools for this toolbar, right-click/Control-click the toolbar, and select the tool. Or, choose Tools > Customize Toolbars.

Select a commenting or markup tool

❖ Do one of the following:

- Select a tool from the Comment & Markup toolbar.
- Choose Tools > Comment & Markup > *[tool]*.
- Choose Comments > Comment & Markup Tools > *[tool]*.

***Note:** After you make an initial comment, the tool changes back to the Select tool so that you can move, resize, or edit your comment. (The Pencil, Highlight Text, and Line tools stay selected.)*

Keep a commenting tool selected

You can add multiple comments without reselecting the tool.

1. Select the tool you want to use (but don't use it yet).
2. Choose View > Toolbars > Properties Bar.
3. Select Keep Tool Selected.

Commenting preferences

Commenting preferences affect both the appearance of and the way you view comments and markups in PDFs.

Note: *Because comments can be placed anywhere within the document frame, you may need to scroll or zoom out to see comments that are located off the page.*

To set commenting preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select Commenting on the left side.

Font, Font Size In Windows, you can determine the font and the size of text in pop-up notes. In Mac OS, you can select only Large, Medium, or Small settings for the font. This setting applies to all new and existing comments.

Pop-up Opacity Determines the opacity of comment pop-up notes in values from 1-100. When a pop-up note is open but not selected, an opacity value of 100 makes the note opaque, while lower values make it more transparent.

Enable Text Indicators And Tooltips Shows a tool tip containing the author name, comment status, and two lines of the text when you place the pointer over a comment that includes a pop-up note. Selected by default.

Print Notes And Pop-ups Specifies that pop-up notes associated with comments, and icons for note, audio, and file attachments, print exactly as they appear on the page.

Instead of selecting this option, you can print comment text in various layouts by choosing File > Print, and clicking Summarize Comments.

Show Lines Connecting Comment Markups To Their Pop-ups On Mouse Rollover When you place the pointer over a comment markup (such as a highlight or a note icon), the shaded connector line between the comment and the open pop-up note appears. Selected by default.

Ensure That Pop-ups Are Visible As The Document Is Scrolled As you scroll a PDF, the pop-up notes on a given page shift to stay in view within the document pane. Selected by default.

Automatically Open Comment Pop-ups For Comments Other Than Notes A pop-up note appears when you create a new comment using a drawing tool, the Stamp tool, or the Pencil tool.

Hide Comment Pop-ups When Comments List Is Open Helps reduce screen clutter when a page includes many comments. Selected by default.

Automatically Open Pop-ups On Mouse Rollover When you place the pointer over a comment of any type, including drawing markups and stamps, the pop-up note opens.

Always Use Log-in Name For Author Name Determines which name appears in the pop-up note you create. If this option is selected, the Login Name in the Identity panel of the Preferences dialog box is used. If this option isn't selected, the default name you specify for Author in a comment properties dialog box is used. Selected by default.

Create New Pop-ups Aligned To The Edge Of The Document Aligns pop-up notes with the right side of the document window, regardless of where the comment markup (such as a note icon or highlighting comment) is added. If this option is deselected, the pop-up note appears next to the comment markup. Selected by default.

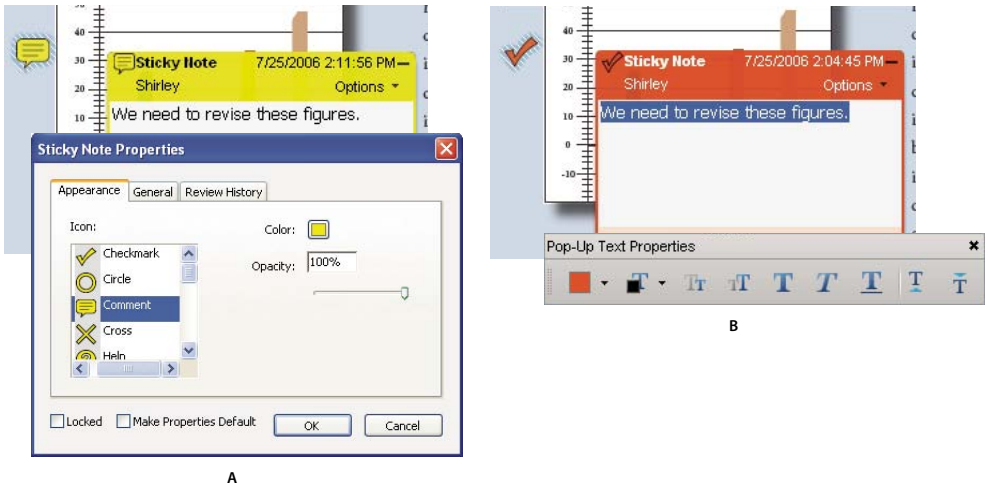
Copy Encircled Text Into Drawing Comment Pop-Ups Copies text that you circle using the drawing tools in the pop-up note associated with the drawing markup.

Copy Selected Text Into Highlight, Cross-Out, And Underline Comment Pop-ups Copies selected text to the pop-up note associated with text editing comments, such as those created by the Highlight Text tool.

Change the look of your comments

You can change the color and appearance of comments or markups before or after you create them. You can set the new look as the default appearance for that tool.

Note: *If you want to change how your name appears in comments, open the Commenting preferences—choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and choose Commenting on the left—and deselect Always Use Log-in Name For Author Name in the Commenting panel of the Preferences dialog box.*



Properties toolbar
A. *With note icon selected* ***B.*** *With pop-up text selected*

Change a comment's look and set it as the default

1 After you create a comment, do one of the following:

- Choose Properties from the Options menu of the pop-up note.
- Right-click/Control-click the markup, and then choose Properties.

2 In the Properties dialog box, do any of the following, and then click Close:

- Click the Appearance tab to change such options as the color and type of icon used. The type of comment selected determines which options are available.
- Click the General tab to change the author's name and subject of the comment.
- Click the Review History tab to see the history of changes people have made to the status of a comment during a review.
- Select Locked at the bottom of the Properties dialog box to prevent the comment from being edited or deleted.
- Select Make Current Properties Default at the bottom of the Properties dialog box to apply these properties to all subsequent comments of this type that you make.

Set the default look for a tool

1 In the Comment & Markup toolbar, right-click/Control-click the tool you want to use, and choose Tool Default Properties.

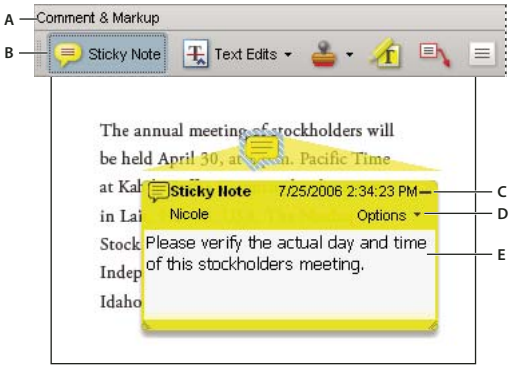
Note: *If the tool you want doesn't appear in the Comment & Markup toolbar, right-click/Control-click the toolbar, and select the tool.*

2 Set the properties as desired, and click OK.

All comments you create using this tool will display the properties you set. Existing comments aren't affected, nor is the appearance of text in pop-up notes.

Add a sticky note

The most common type of comment is the sticky note. A sticky note has a note icon that appears on the page and a pop-up note for your text message. You can add a sticky note anywhere on the page or in the document area.



Use the Sticky Note tool to add a text message in a pop-up note.
A. *Comment & Markup toolbar* ***B.*** *Sticky Note tool* ***C.*** *Close button* ***D.*** *Options menu* ***E.*** *Text message*

Add a sticky note comment

1 Do one of the following:

- Select the Sticky Note tool in the Comment & Markup toolbar, and either click where you want to place the note, or drag to create a custom-sized note.
- Choose Comments > Add Sticky Note.

2 Type text in the pop-up note. You can also use the Select tool to copy and paste text from a PDF into the note.

Note: *If you close the pop-up note, your text remains.*

Edit a sticky note comment

1 Click or double-click the note icon.

2 Make changes, as needed:

- To resize the pop-up note, drag the lower-left or lower-right corner.
- To change the text formatting, choose View > Toolbars > Properties Bar, select the text, and then select the property you want in the toolbar. Or, select the text, right-click/Control-click, and choose a text style option.

Use the Commenting panel in the Preferences dialog box to change the font size, default pop-up behavior, and other settings for creating and viewing comments.

When you're finished, click the minimize button in the upper-right corner of the pop-up note, or click outside the pop-up note.

Delete a sticky note

1 Select the Sticky Note tool, the Hand tool, or the Select tool.

2 Select the note icon, and press Delete.

Alternatively, double-click the note icon and choose Delete from the Options menu of the pop-up note.

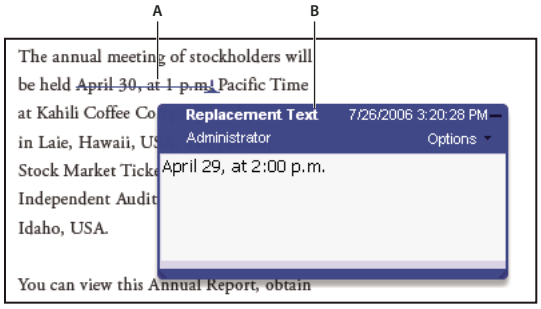
Mark up text with edits

You can use text edit comments in a PDF to indicate where text should be edited in the source file. Text edit comments do not change the actual text in the PDF. Instead, they indicate which text should be deleted, inserted, or replaced in the source file from which the PDF was created.

You can use the Select tool or the Text Edits tool to add most types of text edits. Shortly after you click or select text with the Text Edits tool, an icon appears. If you right-click this icon, a menu of text editing options appears.

In Windows, you can export text edits directly to the Microsoft Word document that the PDF is based on to revise the source document. To use this feature, you must use PDFMaker in Word to create the PDF. Before you export your text edits, make sure that insertion comments use the exact text, including spaces and paragraph returns, that you want to add. If you add extra instructional words (such as "Add the following:"), these words will have to be deleted manually from the Word document.

In Windows, you can export text edit comments directly to an Autodesk AutoCAD document that the PDF is based on to incorporate your edits. To use this feature, you must use PDFMaker in AutoCAD to create the PDF.



Replace Text option
A. *Selected text is struck out.* ***B.*** *New text is added to a linked pop-up note.*

See also

"Export comments to Word (Windows)" on page 189

"Export comments to AutoCAD (Windows)" on page 190

Replace text

1 Use the Select tool, or select the Text Edits tool from the Comment & Markup toolbar.

If you don't want the Indicating Text Edits dialog box to appear each time you select the Text Edits tool, select Don't Show Again in the dialog box, and then click OK.

2 Select the text you want to replace.

3 Press Enter or Return, or choose Replace Text from the menu that appears, and then do one of the following:

- Type the text to be inserted or added. This text appears in a pop-up note. Any selected text is crossed out. The insertion caret appears.
- To indicate that a new paragraph should be added, close the pop-up note without adding text. The paragraph insertion caret appears.

Add a note to a text edit

1 Use the Select tool or the Text Edits tool from the Comment & Markup toolbar.

2 Select Add Note At Cursor from the menu that appears.

3 Type your note in the pop-up note.

Note: *If you export your text edits to Microsoft Word, any text you add to the pop-up note that's associated with a text edit is imported (into Word) with the text edit.*

Show inserted text

1 Select the Text Edits tool from the Comment & Markup toolbar.

2 Click between the words or characters where you want to insert text.

3 Do any of the following:

- Type the text you want to insert.
- To indicate that a new paragraph should be added, press Enter or Return, and then close the pop-up note without adding text. The paragraph insertion caret appears.
- To indicate that a space should be added, press the spacebar, and then close the pop-up note without adding text. The space insertion caret appears.

You can also indicate text edits by using the Select tool to select text, right-click/Control-click the selected text, and then choose Replace Text (Comment).

Delete inserted text

1 In the Comment & Markup toolbar, choose the Text Edits tool .

2 Select the text, and then press Backspace or Delete, or choose Cross-Out Text from the menu.

Delete text markups

If markup comments are stacked, delete the comments in the Comments list: Click the Comments button in the navigation pane to open the Comments list, select the comment, and press Delete.

❖ Do one of the following:

- Select the markup and press Delete.
- Right-click/Control-click the markup, such as the highlighting or cross-out, and then choose Delete.

Highlight, cross out, or underline text

You can use the Highlight Text tool, Cross-Out Text tool, and the Underline Text tool to add comments by themselves or in conjunction with notes. The Cross-Out Text tool and the Underline Text tool don't appear in the Comment & Markup toolbar, by default.

You can add a highlight with a note or you can cross out text by selecting the text using the Select tool or Text Edits tool, and then choosing that option from the menu that appears. However, if you're marking up a lot of text, the specialized tools are faster and easier to use.

1 Choose Tools > Comment & Markups, and select the Highlight Text tool, the Cross-Out Text tool, or the Underline Text tool.

Note: *If you want to apply more than one comment using the Cross-Out Text tool or the Underline Text tool, choose View > Toolbars > Properties Bar, and select Keep Tool Selected in the Properties toolbar after you select the tool. The Highlight Text tool stays selected after you make the first comment.*

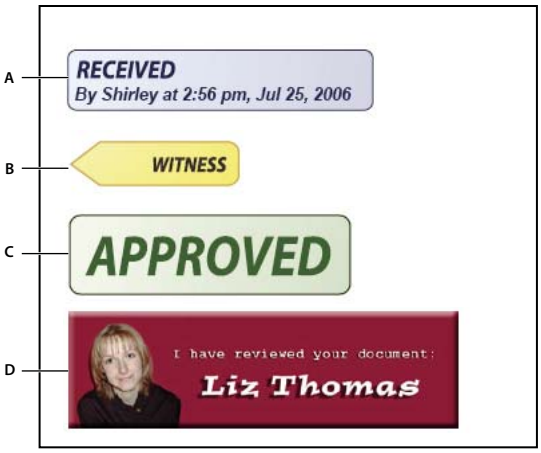
2 Drag from the beginning of the text you want to mark up. Ctrl-drag (Windows) or Option-drag (Mac OS) to mark up a rectangular area of text. This is especially useful when marking up text in a column.

3 (Optional) To add a note, double-click the markup to add text in a pop-up note.

Stamp a document

You apply a stamp to a PDF in much the same way you apply a rubber stamp to a paper document. You can choose from a list of predefined stamps, or you can create your own stamps. Dynamic stamps obtain information from your system and from the Identity panel of the Preferences dialog box, allowing you to indicate name, date, and time information on the stamp.

The Stamp tool appears in the Comment & Markup toolbar, by default.



Stamp tool categories
A. *Dynamic stamp* ***B.*** *Sign Here stamp* ***C.*** *Standard Business stamp* ***D.*** *Custom stamp*

Open the Stamps palette

❖ Do one of the following:

- Choose Tools > Comment & Markup > Stamps > Show Stamps Palette.
- In the Comment & Markup toolbar, click the arrow next to the Stamp tool and choose Show Stamps Palette.

Apply a stamp

1 Select a stamp by doing one of the following:

- Click the Stamp tool. The mostly recently used stamp is selected.
- In the Stamps Palette, choose a category from the menu, and then select a stamp.

2 Click the document page where you want to place the stamp, or drag a rectangle to define the size and placement of the stamp.

3 If you haven't provided a name in the Identity preferences, the Identity Setup dialog box prompts you to do so.

Change a stamp's location or appearance

❖ Using the Select tool or the Hand tool, do any of the following:

- To move a stamp, drag it to a new location.
- To resize a stamp, click it, and then drag a corner handle.
- To rotate a stamp, click it, move the pointer over the handle at the top of the stamp, and drag when the rotate stamp icon appears.
- To delete a stamp, right-click/Control-click the stamp and choose Delete.
- To change the stamp's opacity or the color of its pop-up note, right-click/Control-click the stamp, and choose Properties. In the Appearance tab, set the opacity or color.

Move a stamp to the favorites list

1 Using the Select tool or the Hand tool, select a stamp markup on the page.

2 In the Comment & Markup toolbar, click the Stamp tool and choose Favorites > Add Current Stamp To Favorites.

Create a custom stamp

You can create custom stamps from a number of different formats, including (but not limited to) PDF, JPEG, bitmap, Adobe® Illustrator® (AI), Adobe® Photoshop® (PSD), and Autodesk AutoCAD (DWT, DWG) files.

Note: *To add an image to a PDF one time only, simply paste the image into the document. Pasted images have the same characteristics as other stamp comments; each includes a pop-up note and editable properties.*

1 Choose Tools > Comment & Markup > Stamps > Show Stamps Palette.

2 Click Import, select the file you want to use, and then click Select.

3 If the file has more than one page, scroll to the page you want, and then click OK.

4 Choose a category from the menu or type a new category name, name the custom stamp, and then click OK.

Change the name or category for a custom stamp

1 Choose Tools > Comment & Markup > Stamps > Show Stamps Palette.

2 Choose the stamp category, right-click/Control-click the stamp, and choose Edit.

3 Edit the category or name of the stamp, or replace the image, and then click OK.

Delete a custom stamp

You can delete only the custom stamps that you created, not the predefined stamps. When you delete a stamp, the stamp is removed from the Stamp tool menu, but the stamp file isn't deleted.

1 Choose Tools > Comment & Markup > Stamps > Show Stamps Palette.

2 Choose the stamp category from the menu, right-click/Control-click the custom stamp, and choose Delete.

3 If you haven't provided a name in the Identity preferences, the Identity Setup dialog box prompts you to do so.

Delete a custom stamp category

1 Choose Tools > Comment & Markup > Stamps > Manage Stamps.

2 Select the category you want to delete, and then press Delete.

Note: *Deleting all stamps in a custom stamp category deletes the custom stamp category.*

Add a line, arrow, or shape

When selecting a drawing tool, consider the effect you want.

1 Choose Tools > Comment & Markup, and select a drawing tool:

- The Rectangle tool, the Oval tool, the Arrow tool, and the Line tool let you create simple shapes.
- The Cloud tool and Polygon tool create closed shapes with multiple segments. The Polygon Line tool creates open shapes with multiple segments.
- The Pencil tool creates free-form drawings, and the Pencil Eraser tool removes the pencil markups.

To specify the line width, color, and other properties before you draw, right-click/Control-click the drawing tool, choose Properties, and set the desired options in the Properties dialog box.

2 Draw in the PDF:

- To create a cloud or polygon shape, click to create the start point, move the pointer, and click to create each segment. To finish drawing the shape, click the start point, or right-click/Control-click and choose Complete from the menu. Double-click to end a polygon line.
- To draw a line, arrow, or rectangle, either drag across the area where you want the markup to appear, or click twice: once to create the start point and once to create the end point.
- To draw a square or circle, or to draw a line that's horizontal, vertical, or at a 45° angle, press Shift while you draw.
- To draw free-form lines using the Pencil tool, drag where you want to begin drawing. You can release the mouse button, move the pointer to a new location, and continue drawing. To erase parts of the drawing, select the Pencil Eraser tool and drag across the areas of the drawing that you want to remove.

3 To edit or resize the markup, select it and drag one of the handles to make your adjustments.

4 To add a pop-up note to the markup, select the Hand tool, and double-click the markup.

5 (Optional) Click the close button in the pop-up note. A note icon appears to the right of the markup to indicate the presence of text in the pop-up note.

Note: *To delete a drawing markup, select it and press Delete.*

Group and ungroup markups

You can group two or more markups so that your comments function as a single comment. You might group markups temporarily to move them to a new location or to modify their properties rather than editing each one individually. Grouping also helps to distinguish your markups from other reviewers' markups in a document review.

Note: *You cannot group text edit markups.*

Group markups

1 Using the Select tool or the Hand tool, select a markup.

2 Ctrl-click/Command-click to select the markups you want to group.

3 Right-click/Control-click within the selection, and choose Group.

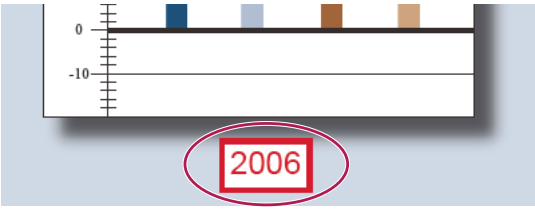
Ungroup markups

❖ Right-click/Control-click the grouped selection, and choose Ungroup.

Add comments in a text box or callout

You can use the Text Box tool to create a box that contains text. You can position it anywhere on the page and adjust it to any size. A text box remains visible on the document page; it doesn't close like a pop-up note.

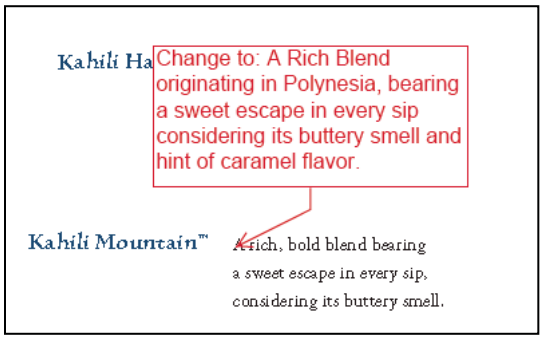
Another way to add a text box is simply to paste copied text into the PDF. Text font and size are based on the system default settings.



***Note:** You can add comments to Japanese, Chinese, and Korean text with the Text Box tool, but you must have the Asian-language resource files installed. Text boxes allow for horizontal text only.*

You can use the Callout tool to create a callout text box. Callout text boxes are especially useful when you want to single out—but not obscure—a particular area of a document. Callout text boxes have three parts: a text box, a knee line, and an end-point line. You can resize each part by dragging a handle. The knee line can be resized in one direction only; horizontal knee lines can be resized horizontally only; vertical knee lines can be resized vertically only. The text box expands vertically as you type so that all text remains visible.

You can move the text box bar itself or together with the end-point line. The text box moves around a stationary anchor point—the arrow on the end-point line—which is created when you first click in the PDF. You can modify the color and appearance of the text box and add arrows or leaders to the end-point line.



Add a text box

1 Choose Tools > Comment & Markup > Text Box Tool.

2 Click in the PDF.

3 Choose View > Toolbars > Properties Bar, and set the color, alignment, and font attributes for the text.

4 Type the text.

Text wraps automatically when it reaches the right edge of the box.

5 (Optional) To make further changes to the text box:

- Using the Select tool or the Text Box tool, click an edge of the text box to select it, and then drag a corner to resize it. Use the Properties toolbar to change the border and fill options.
- Double-click the text box to edit the text or change the text attributes. Drag across text to select it, and then select options from the Properties toolbar.

6 To delete the text box, right-click/Control-click the text box, and then choose Delete.

You can also paste a block of text by selecting and copying the text in any application, selecting the Hand tool in Acrobat, and choosing Edit > Paste.

Add a callout

1 Choose Tools > Comment & Markup > Callout tool .

2 Click once to set the location of the end point, and click again to set the location of the text box.

3 Choose View > Toolbars > Properties Bar, and select the color, alignment, and font attributes for the text.

4 Type the text.

Text wraps automatically when it reaches the right edge of the box.

5 (Optional) To make further changes to the text box:

- To resize the callout, select it and drag any of the handles that appear.
- To move the text box, click inside the box and drag it.
- To move the entire callout, click either the end-point line or an edge of the text box, and drag it.
- To change the color, opacity, or line characteristics, use the Select tool to right-click/Control-click the callout, choose Properties, and select the options you want.

Add an audio comment

You can use the Record Audio Comment tool to add a prerecorded WAV or AIFF file as a comment or to record and place an audio comment in a document. Audio attachments appear in the Comments list and can be played back on any platform. However, the appropriate hardware and software for playing audio files must be installed.

The Record Audio Comment tool doesn't not appear in the Comment & Markup toolbar by default. However, you can add it by choosing Tools > Customize Toolbars.

See also

"Change the look of your comments" on page 171

"Add movies or sounds to PDFs" on page 382

Add a prerecorded audio comment

1 Choose Tools > Comment & Markup > Record Audio Comment tool and then click in the PDF where you want to place the audio comment.

2 Click Browse (Windows) or Choose (Mac OS), and select the audio file you want to add.

3 (Optional) To hear the audio comment, click the Play button . When you're finished, click Stop and then click OK.

4 Specify options in the Properties dialog box, and then click OK.

Record an audio comment

1 Choose Tools > Comment & Markup > Record Audio Comment tool and then click in the PDF where you want to place the audio comment.

2 In the dialog box that appears, click the Record button and then speak into the microphone. When you've finished recording, click the Stop button ■, and then click OK.

3 Specify options in the Properties dialog box, and then click OK.

Add comments in a file attachment

Use the Attach File As Comment tool to embed a file at a selected location in a PDF, so that the reader can open it for viewing. By adding attachments as a comment, you can reference longer documents that can't easily be pasted into a pop-up note or text box. If you move the PDF to a new location, the embedded file automatically goes with it. To view an attachment, the reader must have an application installed that can open the attachment.

Important: *Be sure to use the Attach A File As A Comment tool in the Comment & Markup toolbar when attaching files for a document review. Document-level file attachments that you attach using the paper clip icon (Attach A File tool) from the File toolbar aren't tracked with other comments in a review workflow and may cause your attached comments to be lost.*

1 Choose Tools > Comment & Markup > Attach A File As A Comment Tool .

2 Click in the PDF where you want to place the attachment.

3 Select the file that you want to attach, and then click Select. If you're attaching a PDF, you can highlight areas of interest in the file using comments.

4 In the Properties dialog box, select the settings for the file icon that appears in the PDF, and then click Close.

The comment attachment appears in the Attachments tab with a page number indicating its location.

Note: *To delete the attachment, right-click/Control-click the attached comment icon, and choose Delete.*

Paste images as comments

You can use the Paste Clipboard Image As Stamp tool to add images to a PDF. You can copy most image formats from drawing and image-editing applications, such as Adobe Photoshop and Adobe Illustrator. If you want to add the image to PDFs repeatedly, create a custom stamp of the image.

Note: *The Paste Clipboard Image As Stamp tool isn't available until you copy an image.*

1 Copy an image by doing one of the following:

- In Acrobat, choose Tools > Select & Zoom > Snapshot Tool , and select an image from a PDF.
- In another application, select an image and choose Edit > Copy.

2 Open a PDF.

3 Choose Tools > Comment & Markup > Stamps > Paste Clipboard Image As Stamp Tool.

4 Click in the PDF where you want the image to appear.

5 Do any of the following:

- To move the image, drag it.
- To resize the image, select it and then drag one of its handles. Press the Shift key when resizing the image to maintain the original proportions.
- To change the image properties, right-click/Control-click it and choose Properties.

- To delete the image, right-click/Control-click it and choose Delete.

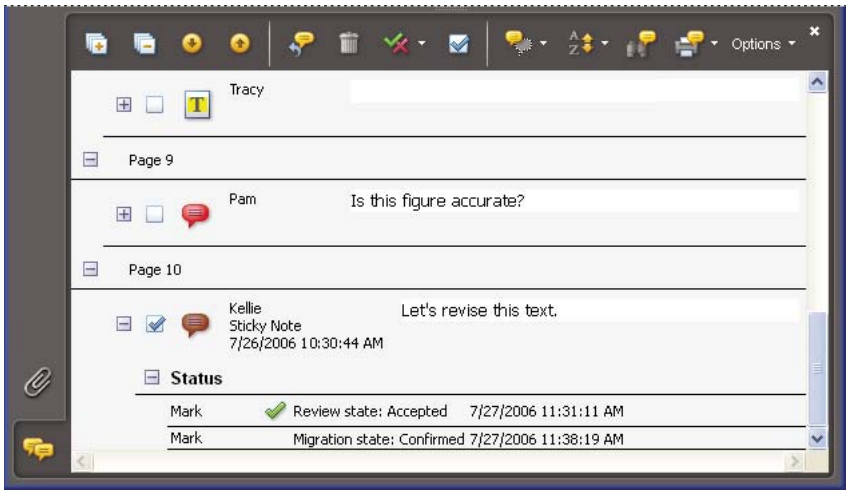
See also

"Copy images" on page 148

Managing comments

View comments

The Comments list displays all the comments in a PDF, and it provides a toolbar with common options, such as sorting, filtering, deleting, and replying to comments.



The Comments button in the navigation pane opens the Comments list.

Open the Comments list

1 Do one of the following:

- Click the Comments button in the navigation pane.
- Choose Comments > Show Comments List.
- Click the Review & Comment button in the Task toolbar and choose Show Comments List.

2 Using the options at the top of the Comments list, do any of the following:

- Expand or collapse the comments. Click Expand All or Collapse All in the Comments List toolbar. To expand or collapse individual comments, click the plus and minus signs next to the comment.
- Browse through the comments. Click a comment in the list, or click the Next button or the Previous button to go to the next or previous comment. (These buttons are unavailable if no comment is selected.) The page on which the selected comment is located appears in the document pane, and the selected comment scrolls into view. To go to the page where another comment is located, simply click the comment in the list.

Sort comments

You can sort comments in the Comments list by author, page, type, date, color, checked state, or status by person. In a thread of replies, only the first message is sorted, and the reply messages are sorted in the same category as the first message in the thread.

1 Click the Comments button in the navigation pane.

2 Choose an option from the Sort By menu in the Comments list.

Show or hide comments

You can hide or show comments based on type, reviewer (author), status, or checked state. Hiding comments is also called filtering. Filtering affects the appearance of comments in both the document window and the Comments list. When you print or summarize comments, you can specify whether hidden comments are printed or summarized. When you hide a note comment that has been replied to, all other replies in the thread are hidden as well.

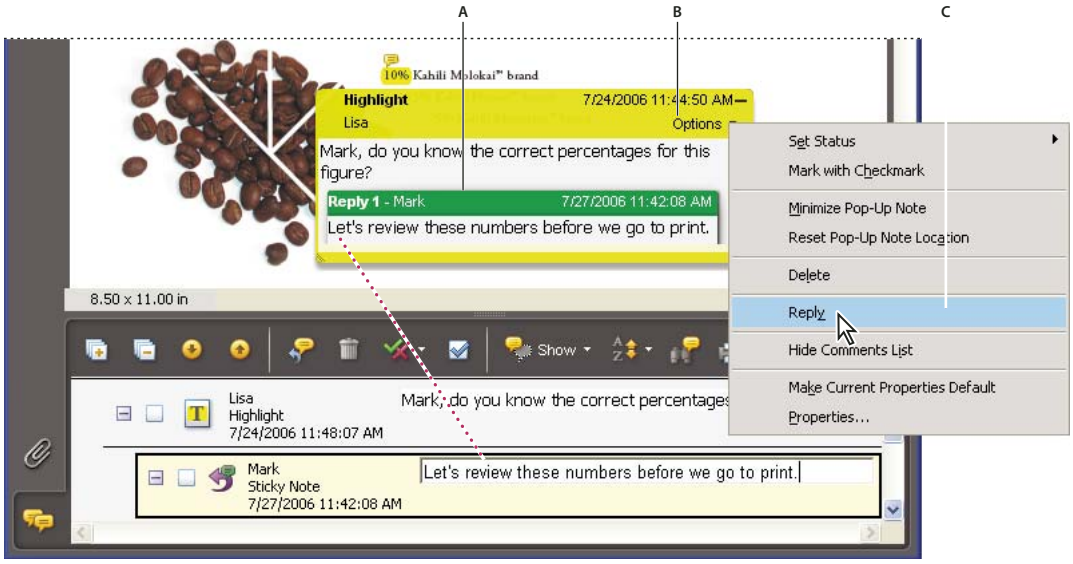
Note: *In an email-based review, hidden comments aren't included when you send the comments to the initiator.*

❖ From the Show menu in the Comments list, do one of the following:

- To show all comments, choose Show All Comments.
- To hide all comments, choose Hide All Comments.
- To filter comments, choose the categories that you want to appear. For example, if you want only note comments that you haven't checked to appear, choose Show By Type > Notes so that only the note comments appear, and then choose Show By Checked State > Unchecked so that only unchecked note comments appear.
- To reverse a filter, choose the All command for hidden categories. For example, if you filtered comments so that only those by a certain reviewer appear, choose Show > Show By Reviewer > All Reviewers.

Reply to comments

Replies to comments are especially useful in shared and browser-based reviews, when participants can read each other's comments. They can also be used by review initiators to let reviewers know how their suggestions are being implemented. When one or more reviewers reply to a comment, the set of replies is called a *thread*. All replies in a thread appear in the pop-up note and in the Comments list. Replies are indented below the original comment. The number of replies that a comment has received appears in a box when you place the pointer over the comment.



Replies appear directly below the comment, in the pop-up note and in the Comments list.
***A.** Reply heading **B.** Options menu **C.** Reply option in Options menu*

Reply in the pop-up note

1 Open the pop-up note for the comment.

2 Choose Reply from the Options menu.

3 Type your reply in the box that appears.

Reply in the Comments list

1 Click the Comments button in the navigation pane.

2 Select a comment in the Comments list.

3 Click the Reply button .

4 Type your reply in the box that appears.

Delete a reply

If you delete a comment that's been replied to, only the comment is deleted. Any replies remain in the PDF, but they are no longer part of a thread. These replies may be difficult to view in the PDF because they are stacked. You may want to view them in the Comments list.

❖ Do one of the following:

- In the pop-up note, right-click/Control-click the reply and choose Delete This Reply.
- Select the reply in the Comments list and then click the trash icon in the Comments List toolbar.

Set a status or check mark

Statuses and check marks are useful for keeping track of comments that you've read or that require further action. In Windows, you can use a status or a check mark to indicate which comments you want to export to a Word document. By setting the review status, you can show or hide a group of comments and let review participants know how you are going to handle the comment. Once the review status is set, you cannot remove the review status display from the comment in the Comments list, even if you change the review status to None. Check marks are for your personal use and do not appear when others view the PDF unless you change the status of comments.

Set a status

1 Select the comment in the Comments list, click the Set Status button , and choose an option.

The review status appears in the comment along with the name of who set the review status. If another reviewer sets the review status for that comment, both reviewers' names and review statuses appear in the Comments list.

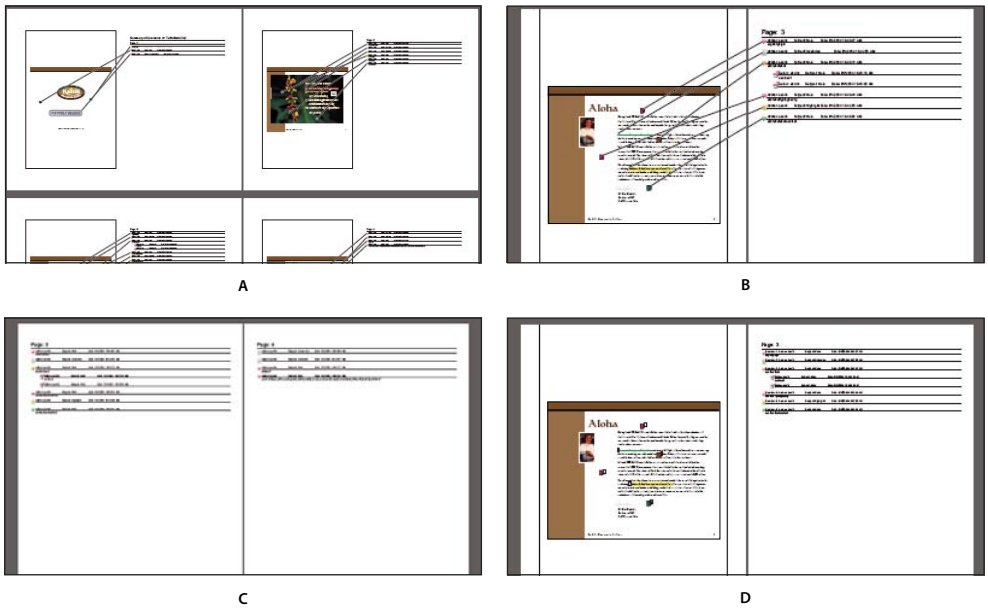
2 To view a comment's history of changes, right-click/Control-click the note icon, markup, or title bar of a pop-up note, and then choose Properties. Click the Review History tab.

Flag comments with a check mark

❖ In the Comments list, click the check box next to a comment so that the check mark icon appears.

Print a comment summary

Summarizing comments is a convenient way to get a synopsis of all the comments associated with a PDF. When you summarize comments, you can either create a new PDF with comments that you can print, or you can print the summary directly. The summary is neither associated with nor linked to the PDF that the comments are derived from.



Page layout options for comment summaries
A. *Document and comments with connector lines on single page* ***B.*** *Document and comments with connector lines on separate pages*
C. *Comments only* ***D.*** *Document and comments with sequence numbers*

By default, Acrobat prints PDFs with any stamps that were applied. For the greatest control over how comments are printed, choose Comments > Print With Comments Summary.

1 Filter the comments to show only those you want in the summary. (In the Comments list, click the Show button and choose the categories of comments you want to show.)

2 For the greatest control over how comments are printed, choose Comments > Print With Comments Summary. Alternatively, to create a separate PDF of the comments, do one of the following:

- Choose Comments > Summarize Comments.
- Choose Summarize Comments from the Options menu in the Comments list.

3 In the Summarize Options dialog box, do the following, and then click OK:

- Choose a layout for the document and comments. The layout determines available options.
- Choose how to sort the comments.
- Specify a page range and choose whether to include pages without comments.
- Select whether you want all comments to appear in the summary or only the comments that currently appear.

4 Do one of the following:

- Click Print Comment Summary, and click OK. (This option appears only if you chose the Print With Comments Summary command.)
- Click Create PDF Comment Summary.

To print or summarize comments directly without opening the Summarize Options dialog box, click the Print Comments button in the Comments List toolbar, and choose Print Comments Summary or Create PDF Of Comments Summary.

Find a comment

Locate a comment in the Comments list by searching for a particular word or phrase.

1 Click the Comments button in the navigation pane to display the Comments list.

2 Click the Search Comments button in the Comments List toolbar.

3 In the Search window, specify the word or phrase you want to search for, and then click Search Comments.

See also

"Search features overview" on page 369

Delete comments

You cannot delete other reviewers' comments in a shared review or a browser-based review, nor can you delete locked comments. If you add comments to a PDF before you upload it to a remote server for review, you can't delete those comments.

To delete all of the comments in a PDF, use the Examine Document feature. See "Examine a PDF for hidden content" on page 248.

Delete a comment

❖ Do one of the following:

- Select the comment and press Delete.
- Right-click/Control-click the comment, and choose Delete.
- In the Comments list, select the comments you want to delete, and then click the trash icon .

Note: *Before pressing the Delete key, make sure that the comment is selected.*

Unlock a comment

1 Right-click/Control-click the comment and choose Properties.

2 Deselect Locked, and then click Close.

Spell-check comments

You can spell-check the text you add in note comments and form fields. However, you cannot spell-check the text in the underlying PDF. Unrecognized words appear underlined after you type them. You can edit these words in context, or you can open the Check Spelling dialog box. The comment in the document window is updated with your changes.

See also

"Spell-check form entries" on page 203

Spell-check a single word

1 Open the pop-up note of a comment.

2 Select the word you want to check, and right-click/Control-click the selection.

3 Select the correct word from the list of alternatives that appear at the top of the menu.

Spell-check all text in comments

1 Choose Edit > Check Spelling > In Comments, Fields, & Editable Text. If the PDF is open in a browser, make sure that the Edit toolbar is open, and click the Spell Check button .

2 Click Start to begin the spell check. When a word that may be misspelled is found, it appears under Word Not Found. Suggested corrections appear under Suggestions.

3 To change the word that may be misspelled, do one of the following:

- Edit the selected word. To undo your change, click Undo Edit. To accept your change, click Change.
- Double-click a suggested correction.
- Click Ignore if you don't want to change the word and want to continue with the check.
- Click Ignore All to ignore every instance of the word. Click Add to add the word to your personal dictionary.
- Select a suggested correction and then click Change. Click Change All to replace every instance of the unrecognized word with the suggested correction.

4 Click Done.

Specify a language dictionary

1 Choose Edit > Check Spelling > Edit Dictionary.

2 Choose a language dictionary from the Dictionary menu, and click Done.

Add a word to the dictionary

By adding words to the spell-check dictionary, you can reduce the number of words that are flagged during a spell check, such as names and company terminology. You can also exclude words from being considered during a spell check. For example, if you want to use an alternate spelling for a common word like "bicycle," add it to the list of excluded words so that it is flagged during a spell check. A separate set of added and excluded words is maintained for each installed language.

1 To add a word, do one of the following:

- During a spell check, if an unrecognized word appears in the Check Spelling dialog box, click Add to add it to the dictionary. The word is added to the language dictionary selected from the Add To menu.
- Choose Edit > Spell Checking > Edit Dictionary. Type the word you want to add in the Entry box, and then click Add. When you're finished adding words, click Done.

2 To remove a word from the list, select the word in the Edit Custom Dictionary dialog box, and then click Delete.

Exclude a word from a spell check

1 Choose Edit > Check Spelling > Edit Dictionary.

2 Choose a language from the Dictionary menu, and then choose Excluded Words from the unnamed menu.

3 Type the word you want to exclude in the Entry box, and then click Add. When you're finished adding words, click Done.

Spelling preferences

You can specify whether words are spell-checked while you type, which color is used to underline words, and which dictionary language is used as the default. To open the Spelling preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Spelling from the list on the left.

Check Spelling While Typing When selected, underlines unrecognized words as you type in a form field or comment.

Underline Color Specifies the color for underlining unrecognized words.

Dictionaries Lists available language dictionaries for spell-checking the PDF. Dictionaries appear in the order in which the spell checker goes through dictionaries in search of words. The dictionary at the top of the list is the first dictionary searched. Click Up or Down to change its position in the list.

Importing and exporting comments

Import Comments

Comments can be imported from a PDF document. You can also import comments from a Forms Data Format (FDF) file or an XFDF file, which is an XML-based FDF file. You cannot open and view FDF files or XFDF files on their own.

1 In the document that you want to receive comments, choose Comments > Import Comments.

2 Choose All Files (*.*) from the menu. If you know the file format of the comments you want to import, choose it.

3 Double-click the name of the document with the comments.

The comment positioning matches that of the file from which they were imported. If comments appear out of place, the source and recipient PDF documents are likely different. For example, if you import comments from a ten-page document to a two-page document, only comments from the first two pages appear.

Export comments

If you add comments to a PDF that isn't part of a managed review, you may need to export your comments to send them to someone, or you may need to import comments you receive. (PDFs in a managed review workflow include special options that let you send or publish your comments, rather than export them.)

When you export comments, you create a Forms Data Format (FDF) file that contains only comments. Consequently, FDF files are usually smaller than PDFs. You or another reviewer can then import the comments from the FDF file into the original PDF.

Export comments to a data file

1. In the PDF that contains comments, choose Comments > Export Comments To Data File.
2. Choose either Acrobat FDF Files (*.fdf) or Acrobat XFDF Files (*.xfdf) from the menu.
3. Name the file and specify a location for it.
4. Click Save to create a data file that contains only the comments.

Export selected comments

1. In the Comments list, select the comments you want to export.
2. From the Options menu in the Comments list, choose Export Selected Comments.
3. Name the file and choose Acrobat FDF Files (*.fdf) or Acrobat XFDF Files (*.xfdf) for the file type.
4. Specify a location for the file, and then click Save.

Compare a revised PDF to an earlier version

The Document Compare feature lets you see the differences in two versions of a PDF, as well as select the type of differences you're looking for to verify that the appropriate changes have been made. The Document Compare feature does not compare comments in the PDF.

1. Choose Advanced > Compare Documents.
2. Specify the two documents to be compared. If necessary, click Choose, select the file, and then click Open. If the documents are open, you can select them from a menu.
3. Under Type Of Comparison, select one of the following:

Page By Page Visual Differences Finds any textual or graphic differences between the documents. Select the level of detail you want from the menu.

Textual Differences Shows which text has been inserted, deleted, or moved.

Include Font Information Compares formatting.

4. Under Choose Compare Report Type, select one of the following:

Side By Side Report Creates a new PDF that displays the two documents in Continuous-Facing mode.

Consolidated Report Adds markups where the differences occur in the current document. When you hold the pointer over a markup in a consolidated report using the Hand tool, the differences appear.

To compare text-based documents, you may want to select Textual Differences to appear in Side By Side Report format. For technical drawings, you may want to select Page By Page Visual Differences to appear in Consolidated Report format.

Export comments to Word (Windows)

In some instances, reviewers make comments in a PDF that was created from a Microsoft Word document. You can revise the original Word document by exporting these comments from the PDF. For example, text that has been inserted, crossed out, or replaced using the text edit tools in the PDF can be deleted or transferred directly to the source Word document. Formatting added to comments (for example, boldface text) is lost during this process and must be added to the Word document manually.

To revise a Word document using comments, you must create a tagged PDF from the Word document. Before you transfer text edits from the PDF, remove any extra words or information and then merge them to one PDF (if you have comments from multiple reviewers). If you plan to import comments more than once, you may want to make a copy of the Word document before you import the comments or comments may not be imported correctly.

1 Do one of the following:

- Choose Comments > Export Comments To Word.
- In Word, open the source document, and then choose Acrobat Comments > Import Comments From Acrobat. For Word 2007, click Acrobat, and then choose Acrobat Comments > Import Comments From Acrobat.

2 Read the instructions, and click OK.

3 In the Import Comments From Adobe Acrobat dialog box, select the PDF and Word files, select from the following options, and click Continue:

All Comments Imports all comments.

All Comments With Checkmarks Imports only those comments marked with check marks.

Text Edits Only: Insertions, Deletions, And Replaces Imports only those comments that you've added using the text edit commands in the Comment & Markup toolbar.

Apply Custom Filters To Comments Imports only comments that you specify by author, type, or status.

Turn Track Changes On Before Importing Comments Shows the changes made by the imported comments in Word.

4 (Optional) If you imported text edits, click Integrate Text Edits in the Successful Import dialog box to review and apply each edit individually. For each edit, select one of the following options:

Apply Makes the change in the document and deletes the comment bubble. If a comment appears to be empty, you may want to integrate it to see if it's a space or a paragraph return.

Discard Rejects the edit and deletes the comment bubble.

Next Skips to the next text edit. Text edits that are skipped or not integrated appear as bubbles in the Word document.

Apply All Integrates all remaining text edits and deletes the comment bubbles.

Undo Last Undoes the last text edit, including any manual changes.

5 Delete comment bubbles that appear in the Word document:

- Right-click the comment bubble and choose Delete Comment.
- Choose Acrobat Comments > Delete All Comments In Document. For Word 2007, this option is on the Acrobat Ribbon.

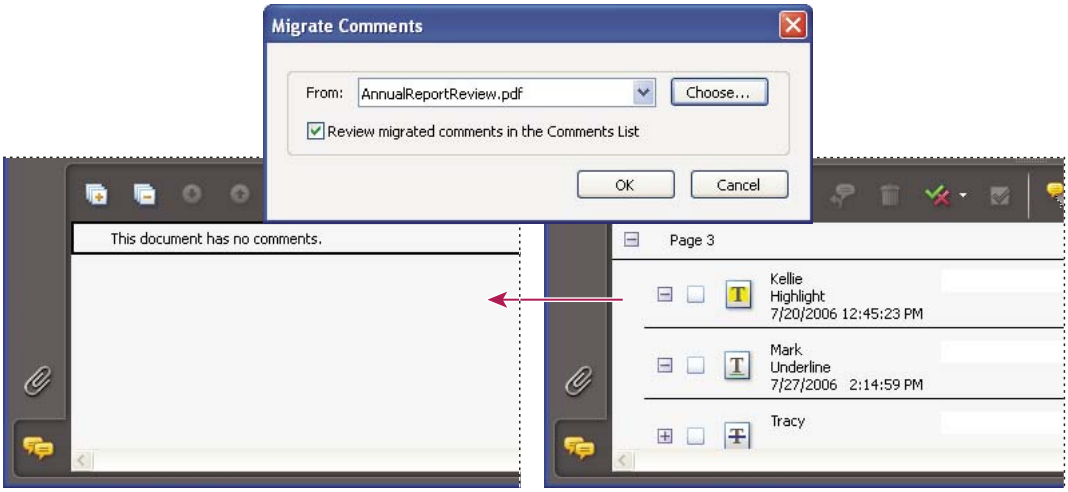
Import comments to a revised PDF

To import new or unresolved comments to a PDF after the document has been revised, use the Migrate Comments feature. This feature attempts to place comments in the correct location by searching specific word groupings and structural elements in the revised PDF.

Note: *Results may be less reliable in untagged PDFs, which lack the internal structure necessary to correctly place imported comments in a revised document.*

Text comments that reference particular words, such as highlights, cross-outs, and insertion carets, appear within the word grouping where they were originally placed. Drawing markups and sticky notes appear in the same structural location as they did in the original document. Circle, polygon, rectangle, and stamp comments always appear on the same page as the original document.

If the revised PDF no longer contains the original word groupings or logical structure order that the comment references, the migrated comment appears on the same page as the original document (or on the last page if the referenced page doesn't exist). In this case, text edits are converted to note comments.



Migrate comments to a revised PDF

1. Open the original PDF and the revised PDF.
2. In the revised PDF, choose Comments > Migrate Comments.
3. Choose the original PDF from the From menu, and click OK.

Set the migration status for a comment

❖ In the Comments list, select the comment, click the Set Status button , and choose Migration > *[status]*.

Export comments to AutoCAD (Windows)

You may have reviewers add comments to a PDF that was created from an AutoCAD drawing in Windows XP or Windows 2000. If you use AutoCAD PDFMaker to create a PDF, you can import comments into the AutoCAD drawing, rather than switch between AutoCAD and Acrobat. You can import most comment types, including drawing markups, sticky notes, stamps, and text edits.

1. Save the PDF to ensure that recently added comments are included.

2 Do one of the following:

- In Acrobat, choose Comments > Export Comments To AutoCAD, and then specify the PDF file and the AutoCAD file in the Import Comments dialog box.
- In AutoCAD, choose Acrobat Markups > Import Comments From Acrobat.

3 In the Import Comments dialog box, specify the PDF that contains the comments, specify which comments to import, and click Continue. If you import a custom set of comments, specify the set by making sure that only the characteristics you want are selected. You must select at least one option in each category.

Show By Reviewer Imports comments by individual reviewers.

Show By Type Imports comments by type, such as text edits or note comments.

Show By Status Imports comments by review status.

Show By Checked State Imports comments that are checked.

All imported comments appear in the Adobe Acrobat Markups layer as custom objects that you can edit, filter, or delete.

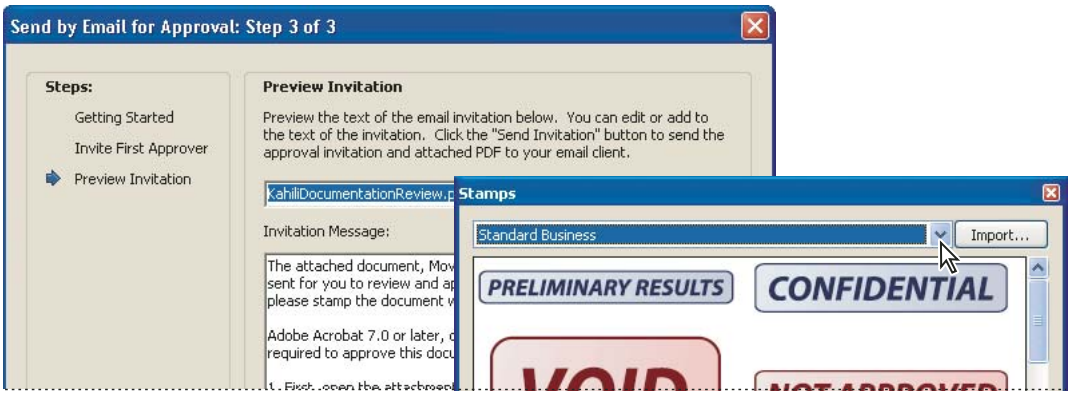
4 To modify an imported comment (change the status, add a check mark, or modify text), right-click the comment, choose Acrobat Comments, and then choose an option.

Approval workflows

About approval workflows

In Acrobat (Traditional Chinese, Simplified Chinese, Japanese, and Korean only), you can send PDFs as email attachments for others to approve. When participants open an approval request in Acrobat (all languages), they can approve the PDF by adding a digital identity stamp. Then, they can send the PDF to other approvers, or return the PDF to the initiator and other appropriate participants. The initiator can track progress by choosing to be notified each time the PDF is approved. The workflow ends when the last participant adds the final approval. If a PDF isn't approved, the approval workflow must be reinitiated.

Note: *To initiate an approval workflow, you must use Acrobat 7.0 or later (except for Acrobat Elements). If you use Acrobat Professional to initiate the workflow, you can invite users of Adobe Reader 7.0 or later to participate by enabling commenting in the PDF.*



Wizard sets up approval workflows (left); Stamps palette provides digital identity stamps for approving documents (right).

Send a PDF for approval

When you send a PDF by email for approval (Traditional Chinese, Simplified Chinese, Japanese, and Korean only), approvers receive the PDF as an email attachment. When recipients open the PDF attachment, they can apply a digital identity stamp from the Stamps palette and then make the appropriate selection in the document message bar.

To send a PDF for approval, use the wizard in Acrobat. The wizard provides on-screen instructions to help you invite approvers, customize instructions, and send the PDF.

The wizard enables commenting in the PDF so that Adobe Reader users can participate in the approval workflow.

Before you initiate an approval workflow, make sure that your email application is configured to work with Acrobat.

1 To start an approval workflow, do one of the following:

- Click the Review & Comment button in the Task toolbar, and choose Send By Email For Approval.
- Choose Comments > Send By Email For Approval.

2 If prompted, enter your email address in the Identity Setup dialog box.

3 Click Browse (Windows) or Choose (Mac OS), select a PDF, click Open, and click Next.

4 Type the email address for the first approver in the To box.

5 If you want to enable Reader users to participate or if you want to be notified of the approval status for each participant, specify those options.

6 (Optional) Type additional instructions for the first approver at the top of the email message.

Only the default text message and instructions are forwarded to subsequent approvers.

Note: *The invitation email contains instructions to help participants complete the approval process. Avoid changing or removing this text.*

7 Click Send Invitation.

Participate in an approval workflow

If you're invited to participate in an approval workflow, you receive an email message that provides step-by-step instructions for approving the attached PDF. When you open the PDF, the Stamps palette and the How To window open, and the document message bar appears at the top of the PDF. If your version of Acrobat is earlier than 7.0, you're prompted to download the latest version of Adobe Reader.

You can select any of the digital identity stamps in the Stamps palette to approve the document. A digital identity stamp contains identity information that you provide, such as name, title, organization, and email address, and it can be used in place of a signature. When you apply a stamp, it becomes part of the document's page content. You can delete your own stamp during the approval process; however, once the approval process is completed, your stamp is locked. You can't move or delete stamps from other participants.

You may also reject documents that don't meet your standards.

In addition to adding digital stamps to a PDF, you can add other types of comments, including note comments, text edits, custom stamps, and file attachments.

See also

"Create a custom stamp" on page 176

"Commenting and markup tools overview" on page 168

"Select an email application for reviews" on page 156

Approve a PDF

1 Open the PDF attachment in the approval invitation email message.

Note: *If you haven't added identity information to the stamp, you're prompted to do so.*

2 Select a stamp from the Stamps palette. (To view all stamps, scroll or drag a corner to resize the window.)

3 Click the document to apply your approval stamp.

Note: *To delete a digital identity stamp that you've applied, select it and press Delete. If you select Print, Save A Copy, or Email during the approval process, you can't delete your stamp.*

4 Do one of the following:

- To send the document to the next approver, click the Approve button in the document message bar. In the Send To Next Approver dialog box, type the email address for the next approver in the To box, add addresses for other recipients as appropriate, and click Send.
- To complete the approval process, click the Final Approval button in the document message bar. In the Complete Final Approval dialog box, specify whether to send an approval notification from the Final Approval Method menu. If you send a notification, type an email address in the To box, add addresses for other recipients as appropriate, and click Send. If you don't send a notification, click Complete.

If the Notify Initiator Of Approval Status Via Email option is selected, a separate email notification appears, addressed to the initiator. Click Send to send this notification.



PDFs in an approval workflow present instructions and tools.

5 Save the PDF.

Important: *If you use the Email button*  *in the toolbar to send the PDF, the PDF is no longer part of the workflow, and approval options aren't available to the recipient of that email message.*

Reject a PDF

If the PDF you received in an approval request doesn't meet the requirements for approval, use the options in the document message bar to reject the document and return it to the initiator. If a PDF is rejected, the approval workflow must be reinitiated.

1 Open the PDF attachment in the approval invitation email message.

2 Click the Reject button in the document message bar.

3 In the Reject And Send Notification dialog box, type the email address for the initiator in the To box. If the Notify Initiator Of Approval Status Via Email option is selected, a separate email message is sent to the approval initiator. Click Send.

4 Click Send in the email message that appears.

Add or change identity information for a digital stamp

1 From the Stamp menu, choose Show Stamps Palette.

2 In the Stamps palette, select Digital Identity Stamps, right-click/Control-click your stamp, and choose Edit Identity.

3 In the Identity Setup dialog box, type or edit your name, title, company name, department, and email address, and click Complete.



You can also change your identity information by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and selecting Identity on the left.

Chapter 7: Forms

Adobe PDFs can be interactive forms that can streamline the process of filling out a form and of collecting form information.

You can create PDF forms using either Adobe Acrobat 8 Professional or Adobe LiveCycle Designer (included with Acrobat Professional). Filling in a form can be done in either Acrobat or the free Adobe Reader.

Quickstart

The following topics provide overview steps to some common forms tasks.

Fill in a form with fields

An *interactive* PDF form contains form fields that can be selected or filled in.

1 Click to select options, such as radio buttons. Click inside a text field to type.

2 Press Tab to move forward or Shift+Tab to move backward.

3 When finished, click the submit button, if applicable, and save or print the form if desired.

To fill out noninteractive PDF forms, use the Typewriter tool (if enabled).

See also

"Fill in and clear a form" on page 201

Type on a form without fields

If a PDF form doesn't contain *interactive* form fields that can be selected or filled in, you can still fill in the form online.

1 Choose Tools > Typewriter > Typewriter.

2 Click over a blank form field and type.

3 (Optional) Choose Tools > Typewriter > Show Typewriter Toolbar. Use these tools to change the size or position of the typed text.

4 When finished, print a copy of the completed form.

See also

"Fill in and clear a form" on page 201

Return a filled-in form

You have several options for returning form data.

1 To return an interactive form, do any of the following:

- Click the submit button.

- Save and email the form (if enabled by the form creator).
- Print and mail the form.

2 To return a noninteractive form, do one of the following:

- If you filled in the form with the Typewriter tool, print and mail the form.
- Print the form, fill it in by hand, and mail it.

See also

"Fill in and clear a form" on page 201

Create a form

The Create New Form wizard guides you through creating a PDF form from a template (Windows only), an electronic document, spreadsheet data, or a scanned paper document.

1 Click Forms on the toolbar, and choose Create New Form.

2 Select the source for the PDF form, and click Continue.

3 Follow the on-screen instructions.

Forms created with the wizard are LiveCycle Designer forms. To create an Acrobat form instead, choose Forms > Run Form Field Recognition.

See also

"Creating new forms" on page 212

Edit a form

Depending upon how a PDF form was created, you can edit it in either Acrobat or LiveCycle Designer (Windows only).

Note: *(Windows) PDF forms created in Acrobat can be edited in LiveCycle Designer, but those created or edited in LiveCycle Designer cannot be edited in Acrobat.*

1 Open a PDF form.

2 Choose Forms > Edit Form In Designer or Edit Form In Acrobat.

3 Add or modify form fields and field properties as desired.

See also

"Create form fields in Acrobat" on page 214

Distribute a form

After you create a PDF form, you can distribute it by using the Distribute Form wizard.

Note: *To use the wizard, the form must contain a submit button.*

1 Open the desired form.

2 Click the Forms button on the Tasks toolbar, and choose Distribute Form.

3 Follow the on-screen instructions to prepare the form for distribution.

4 Specify if you want to email the form or save and send it later.

5 Follow the on-screen instructions to distribute the form.

See also

"Distribute a form by email" on page 236

Track and manage forms

The Forms Tracker helps you manage forms you've distributed.

1 Click the Forms button on the Tasks toolbar, and choose Track Forms.

2 Select an icon on the left to see forms in that category:

- To Do displays forms you've received.
- History displays forms you've distributed.
- Search Results allows you to search for specific forms.
- Forms Library displays forms you've saved in the library for future distribution.

See also

"About Forms Tracker" on page 243

Compile data received by email

As users return their form data, you can compile it into a data set.

1 Open the email attachment containing the returned form.

2 In the dialog box that appears, select an existing data set or create a new set for the form data.

The new data is added and the data set opens, allowing you to review all responses. You can also compile data by clicking Forms on the Tasks toolbar, and choosing Compile Returned Forms.

See also

"Compile form data" on page 241

Review form responses

After you've compiled returned form data into a data set, the PDF automatically opens for you to review the responses.

❖ With the desired data set PDF open, do any of the following:

- To review an individual response, select a line in the response list.
- To sort the response list, click the desired column heading.
- To add data, click Import Data .
- To delete data, select a record and press Delete.

See also

"Manage form data files" on page 242

Export form data to a spreadsheet

Once you've collected PDF form data in FDF or XML format, you can organize the form data into a comma-delimited spreadsheet (CSV) file.

1. Choose Forms > Manage Form Data > Merge Data Files Into Spreadsheet.
2. Click Add Files, and then select the desired data files.
3. Click Export, choose a location for the CSV file, and click Save.

See also

"Export records from a PDF data set" on page 242

Forms basics

What are PDF forms?

You're already familiar with paper forms: documents with blanks that people fill in and deliver to the appropriate person or organization. An Adobe PDF form is a computer-based version of a form, which can either be distributed through email or CDs, or published on a website.

PDF forms can be ordinary PDFs with blank form fields or they can be *interactive*. Ordinary PDFs are a convenient way of publishing forms that must be printed, filled out by hand, and physically delivered, such as by mail or fax. An interactive form can be filled out on a computer and may be submitted through an Internet or local network connection. The built-in security features can safeguard the privacy of electronically submitted data.

Interactive forms simplify the work users must do to provide the needed information. Electronically submitted forms can be labor-saving at the receiving end, too, because the data from many individuals can be set up to be collated automatically.

If you already use other kinds of forms, you can quickly make them into interactive PDF forms: You can scan paper forms and you can convert electronic forms in other formats (such as Word documents, InDesign layouts, and Excel spreadsheets) to interactive PDF forms.

Viewing a PDF form

When you open a form that someone sends you to fill out, a document message bar appears between the Acrobat toolbars and the form itself.

The left side of the message bar typically displays instructions about how to complete and return the form. If you open the form in Adobe Reader, the usage rights associated with that form are also described in this area. You can hide or show the document message bar by clicking its button .

The right side of the message bar has one or more buttons. The first is a Highlight Fields button , which colors the backgrounds of all blanks to be filled in and outlines any required blanks, making it easy to see them at a glance.

You navigate and adjust views of a form in exactly the same way that you do in ordinary PDFs.

Note: *You can change the default settings for highlight color, whether forms open with the document message bar visible or hidden, and other viewing options in the forms preferences. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Forms under Categories.*

Types of PDF forms

The way in which you fill in and submit information on a PDF form is determined by the person who created it.

Fill-and-print PDF forms Contain interactive form fields or static form fields; either way, the person filling in the form must manually deliver a printed copy of the form, such as by mail or fax.

Submit-by-email PDF forms Contain a button that either extracts all interactive-field data from the PDF form and attaches it to an email message or attaches the entire filled-in PDF form to the message.

Submit-online PDF forms Contain a button that sends all interactive-field data to an online repository, such as a database. Available only when Acrobat is open inside a web browser.



When you fill in a PDF form, you can press Tab to jump from one form field to the next. After you Tab to a check box or button that you want to select, press Enter or spacebar to select it (or to deselect it, if it's already selected).

Another important distinction is between XML forms and other PDF forms. You can create and edit XML forms in LiveCycle Designer but not in Acrobat.

Printing and saving PDF forms

Interactive forms can be filled in using either Adobe Reader or Acrobat. Users running either of these applications can save a blank version of the form, and they can print copies of their completed forms before submitting them.

After a form is filled in, Acrobat users can save a copy of the completed form, showing all the information they typed. Whether or not Adobe Reader users can save a copy of a completed form depends on the usage rights set up by the person who created that form.

Note: *When you open a form in Adobe Reader, the usage rights appear in the notification area above the form itself.*

About security for PDF forms

As with all sensitive data you transmit, precautions should be taken to minimize the likelihood of interception and use by malicious parties. Such precautions may include the use of encryption, passwords, and other security measures on your document.

All Adobe products enforce the restrictions set by the permissions password. However, not all third-party products fully support and respect these settings. Recipients might be able to bypass some or all of the restrictions you've set.

See also

"Opening restricted documents" on page 247

Forms preferences

Set forms preferences to control various aspects of your interaction with form fields.

To open the Preferences dialog box, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select Forms on the left. The forms preferences are organized in three sections: General, Highlight Color, and Auto-Complete

Note: *The forms preferences apply to the way the application handles open forms as you work. The preferences aren't saved with the PDF forms themselves.*

See also

"Change the Auto-Complete options" on page 202

General

Automatically Calculate Field Values Automatically performs all field calculations upon user entry.

Show Focus Rectangle Indicates which form field currently has the focus.

Keep Forms Data Temporarily Available On Disk Retains forms data in the web browser if you briefly go to another web page and then click Back to return to the PDF form.

Show Text Field Overflow Indicator Displays a plus sign (+) in text fields that exceed the bounds specified when the fields were created.

Always Hide Forms Document Message Bar Hides the forms document message bar by default whenever a PDF form is opened in Adobe Reader.

Show Field Preview When Creating Or Editing Form Fields Displays the appearance of a form field when you create or edit forms.

Manage Barcode Parameters Opens a dialog box with a list of barcode items (including the Parameter Set Name, Symbology, and Built-in status for each item). Includes New, Edit, Delete, Import, and Export buttons for working with new or selected parameter sets.

Highlight Color

Show Border Hover Color For Fields Displays a black outline around a form field when you place the pointer over it.

Fields Highlight Color Opens a color picker for selecting the color of highlighted form fields. The highlight appears when the Highlight Fields button  on the document message bar is clicked.

Required Fields Highlight Color Opens a color picker for selecting the border color of form fields that must be filled in. The border appears for required form fields only after you attempt to submit the form.

Auto-Complete

Auto-Complete menu Displays three options for Auto-Complete: Off, Basic, or Advanced.

Remember Numerical Data Suggests your previously entered numerical entries when you type the same first character into a similar field. When deselected, Auto-Complete offers suggestions only for text entries. (Available only when Basic or Advanced is selected.)

Edit Entry List Displays current entries stored in the Auto-Complete memory. You can select and delete any entries that you don't want to keep for filling in future forms. (This option isn't available if no entries are in the memory.)

Filling in PDF forms

Fill in and clear a form

If a PDF form contains interactive form fields, you can fill in the form with one of the tools in the Select & Zoom toolbar: the Hand tool or the Select tool. When you place the pointer over an interactive form field, the pointer icon changes to one of the following:

- Pointing Finger or Pointing Hand Plus icon. Appears when the pointer is over a button, radio button, check box, or item in a list.
- Arrow. Appears when you can select an item in a list of options.
- I-beam icon. Appears when you can type text into the form field.

If the form fields aren't interactive, the basic pointer icon doesn't change.

Noninteractive PDF forms can be printed and filled in by hand. Or, you can choose Tools > Typewriter > Typewriter and use the Typewriter tool to type information over the blank form fields and then print a copy of the completed form.

Note: *Some text fields are dynamic, meaning that they automatically resize to accommodate the amount of data you enter and can span across pages.*

See also

"Forms preferences" on page 199

Fill in an interactive form

1 If necessary, select either the Hand tool or the Select tool.

2 (Optional) To make form fields easier to identify, click the Highlight Fields button on the document message bar. Form fields appear with a colored background (light blue by default), and all required form fields are outlined in another color (red by default).

3 Click in the first form field you want to fill in, either to select that option or to place an I-beam pointer in the field so you can start typing.

4 After making a selection or entering text, do any of the following:

- Press Tab or Shift+Tab to accept the form field change and go to the next or previous field.
- Press the Up Arrow or Left Arrow key to select the previous radio button in a group of radio buttons, or press the Down Arrow or Right Arrow key to select the next radio button.
- Press Esc to reject the form field change and deselect the current form field. If you're viewing the form in Full Screen mode, pressing Esc a second time causes you to exit Full Screen mode.

Note: *If the current form field is a single-line text box, you can press Enter (Windows) or Return (Mac OS) to accept your typing and deselect the field. If the current field is a check box, pressing Enter or Return turns the check box on or off. In a multiline text form field, pressing Enter or Return creates a paragraph return in the same form field. In all cases, you can press Enter on the keypad to accept the change and deselect the current form field.*

5 After you fill in the form fields, do any of the following:

- Click the submit form button, if one exists. Clicking this button sends the form data to a database across the web or over your company intranet.
- Choose File > Save As, and rename the file to save the form with the data you entered.

- Export the form data.
- Print the form.

Clear a form in a browser

❖ Do either of the following:

- Select the reset form button, if one exists. You cannot undo this action.
- Quit the browser, and start again.

Note: *Clicking the web browser's Reload or Refresh button, the Back or Go Back button, or following a link to another page may not completely clear the form.*

Clear unsaved form entries

❖ Choose File > Revert.

Change the Auto-Complete options

The Auto-Complete feature stores any entries that you type in a PDF form field, and then suggests or even automatically enters responses that match your typing in other form fields. The suggestions appear in a pop-up menu, from which you can select a match. The Auto-Complete feature is off by default, so you must enable it in the forms preferences if you want to use it.

If you want to remove an entry from the Auto-Complete memory—such as a misspelled entry that you found and corrected later—you can edit the list in the preferences.

Enable the Auto-Complete feature

1 Choose Edit > Preferences (Windows) or choose Acrobat > Preferences (Mac OS).

2 Select Forms on the left.

3 Under Auto-Complete, choose Basic or Advanced from the menu.

4 Select Remember Numerical Data if you want the Auto-Complete memory to store numbers that you type into forms.

When you select an option in the Auto-Complete menu, a description of how it affects the Auto-Complete behavior appears in the text area below.

Delete an entry from the Auto-Complete memory

1 Choose Edit > Preferences (Windows) or choose Acrobat > Preferences (Mac OS).

2 Select Forms on the left.

3 Click Edit Entry List.

4 In the Auto-Complete Entry List dialog box, do one of the following, and then click Yes in the confirmation dialog box:

- To remove all of the entries, click Remove All.
- To remove some of the entries, select the entries and click Remove. (Shift-click to select multiple adjacent entries; Ctrl-click /Command-click to select multiple nonadjacent entries.)

Adding lengthy entries in forms

PDF forms can contain *dynamic text fields,* which grow in size to accommodate the text you type into it. A scroll bar appears in dynamic text fields when the text you type exceeds the current size of the field; when you're finished typing and the field is deactivated, the text field expands to display all of the typed text.

If necessary, the field may span onto the next page. If you want to continue editing a dynamic text field that spans across pages, you can begin editing the field on either page; you'll have access to all of the text in the field.



Entering text in form field that spans across two pages

Filling in forms with barcodes

Some forms include barcode fields, which capture and display other information in the form as a black-and-white pattern. You don't have to do anything with the barcode area itself. As you fill in the form on your computer, the information you enter is included in the barcode and changes the barcode appearance.

Important: *For any form with barcode fields, it's essential that you fill it in on your computer. Don't fill it in by hand on a printed copy. If you're going to submit the form on paper, such as by mail or fax, be sure to fill it in electronically before you print it.*

The barcode field makes collecting data easier for the form recipient because the barcode can simply be scanned. The results are an accurate and detailed summary of your input.

Search a form

When you search for words in a PDF, the search includes any text appearing in form fields (as well as other text in the PDF), whether you typed the text or selected it from a list or menu on the form.

❖ Do one of the following:

- Type the text you want to search for in the Find box in the toolbar, and then press Enter. To find the next instance of the search text, press Enter again.
- Choose Edit > Search, and type the text into the Search window. Then select other basic or advanced options for searching, and click Search.

Spell-check form entries

You can spell-check the text you typed in note comments and form fields. If you want to check the spelling in a comment, first open the comment window.

You cannot check the spelling of text in the underlying Adobe PDF document.

Correct a misspelling

❖ Right-click/Control-click the word in the form field or comment window, and then choose the correct word from the list of alternatives.

Spell-check entries and comments

1 Choose Edit > Check Spelling > In Comments. If the PDF document is open in a web browser, make sure that the Edit toolbar is open, and click the Spell Check button .

2 Click Start to begin the spell check. When a word that may be misspelled is found, it appears under Word Not Found. Suggested corrections appear under Suggestions.

3 If a possibly misspelled word appears under Word Not Found, do any of the following:

- Edit the unrecognized word by typing. To undo your change, click Undo Edit. To accept your change, click Change. To change all instances of the unrecognized word, click Change All.
- Select the correct version of the unrecognized word from the Suggested Corrections section and click Change. Or, simply double-click the correct version of the word. To change all instances of the word to the selected correct version, click Change All.
- Click Ignore if you don't want to change the word and want to continue with the check.
- Click Ignore All to ignore every instance of the word. Click Add if you want to add the word to your personal dictionary.

4 After you make a selection in step 3, the next unrecognized word (if any) is highlighted; repeat step 3 until the Restart button appears.

5 Click Done.

Specify a dictionary

1 Choose Edit > Check Spelling > Edit Dictionary.

2 Choose the language dictionary you want to use from the Dictionary menu, and then click Done.

Import form data

As an alternate to filling in a PDF form manually, you can import file data from a text (TXT), Extensible Markup Language (XML), Acrobat Form Data Format (FDF), XML Data Package File (XDP), FormFlow99 Data File (XFD), or Acrobat XFDF (XFDF) file into a PDF form. Some file formats are available only if you import the data into particular PDF forms, such as a PDF form created in LiveCycle Designer.

Note: *If you import data from a text file, each row in a text file must be tab-delimited to create columns, as in a table. When a row of data is imported, each cell becomes the value of the form field that corresponds to the column name.*

1 Open the PDF form.

2 Choose Forms > Manage Form Data > Import Data.

3 Choose the form data type from the Files Of Type menu, select a file, and click Select.

Note: *If you import form data from a form that doesn't match the form you're importing into, only the form fields that match are updated, and those that don't match are ignored. Existing text in text form fields is replaced if you import data to those fields.*

Commenting on forms

Acrobat users can comment on PDF forms, just as on any other PDF. If the form creator has extended rights to Adobe Reader users, they can also add comments.

Whether or not these comments are included when the form is submitted depends on how it's submitted. For example, if you use Reader to print the form for mailing or faxing, the comments don't appear. If you attach the filled-in form to email as a complete PDF, the comments are included.

See also

"Commenting" on page 168

"Enable Reader users to save form data" on page 213

Submitting forms

Exporting and emailing forms

You can export data you enter into a form to a separate file. When you export the form data, it's saved in a file that's considerably smaller than the original PDF. A smaller file is preferable for archiving or sharing the data electronically. Depending on how the form was created, you can save the form data as a tab-separated text (TXT), Acrobat XFDF (XFDF), Acrobat Form Data Format (FDF), or Extensible Markup Language (XML) file; or, you are able to save the form only in XML or XDP format.

You can also import data from an exported file into another form if that form has fields with the same names. Alternatively, you can import file data from a text file.

PDF forms can contain an email-based submit button that exports the data you entered. You can email the form data with a desktop or web-based email application, or you can submit the form data at a later time.

Note: *If the PDF form doesn't contain an email-based submit button, it may have a submit button that sends the form data via the web or some other service.*

See also

"Import form data" on page 204

Export form data to a file

1. Open the PDF form and fill it in.
2. Choose Forms > Manage Form Data > Export Data.
3. Choose a format from the Save As Type menu, specify a location and filename, and click Save.

Email a form using your email application

When you click an email-based submit button in a PDF form, you have the option to submit the form data with your preferred desktop email application.

1. Click the submit or return form button on the PDF form.
2. In the Select Email Client dialog box, select Desktop Email Application; then click OK.

Your default email application displays a new email message with the To, Subject, Body, and Attachment fields automatically filled in.

3 Send the email.

Email a form using a web service

When you click an email-based submit button in a PDF form, you have the option to submit the form data with a web-based email service.

1 Click the submit or return form button on the PDF form.

2 In the Select Email Client dialog box, select Internet Email; then click OK.

3 Click Save PDF File or Save Data File, specify a location for the file, and click Save.

4 Log in to your web-based email service, and create a new, blank email message.

5 In the Sending The PDF File dialog box in Acrobat, copy the text in the To box.

6 In the blank email message, paste the copied text into the To box. Repeat the process for the Subject and Message Text boxes.

7 Attach the file that you saved to the email message.

Submit a PDF form at a later time

When you click an email-based submit button in a PDF form, you have the option of not submitting the form data, but instead saving it on your computer to send at a later time.

1 Click the submit or return form button on the PDF form.

2 In the Select Email Client dialog box, select Other, and then click OK.

3 Click Save PDF File or Save Data File, specify a location for the file, and click Save.

4 Write down the values that appear in the To, Subject, and Message Text boxes so you'll have them when you're ready to email the form data.

5 To email the form data, create a new message in your email application. Enter the To, Subject, and Message Text values that you wrote down, attach the data file that you saved, and send the email.

Planning a PDF form

Options for creating PDF forms

There are many approaches to creating PDF forms. If you have existing paper forms, you can convert them to PDF in various ways, depending on their current format. If you have noninteractive PDF forms, you can transform them into interactive PDF forms that can be filled in and submitted electronically through a network or Internet connection.

Using LiveCycle Designer (included with Adobe Acrobat Professional for Windows), you can also create entirely new PDF forms from blank pages or from designer-created templates.

Paper forms Using a scanner, you can convert a paper form to PDF and use the forms tools to create interactive form fields in the same page locations as on the paper form.

Electronic documents In Windows, you can start with an existing form or you can create a new one in an authoring application, such as Word, Excel, or InDesign, and convert it to PDF. Or you can start with an existing PDF and use Acrobat to add form fields and other forms features.

Blank documents In Acrobat 8, you can create a PDF from a blank page and use the new PDF Editor feature to add text. Then, you can use the Forms tools to add form fields of various types. Or, in Windows, you can create a form in LiveCycle Designer, taking advantage of its powerful collection of advanced features and tools.

LiveCycle Designer templates (Windows) Using the wizard from the Forms > Create New Form command, you can select an appropriate type of form document. Then, you personalize it by swapping out placeholder text, graphics, form fields, and properties with custom ones that you provide or define.

Using Acrobat versus LiveCycle Designer (Windows)

LiveCycle Designer is included with Acrobat Professional for Windows. LiveCycle Designer enhances the form-creation features in Acrobat and offers a robust collection of advanced features and controls.

Note: *Acrobat users on Mac OS can create and edit forms in Acrobat only if those forms haven't been opened and saved on Windows in LiveCycle Designer. Of course, Acrobat and Reader users on Mac OS can open and fill in any PDF form, regardless of whether it was created on Windows or Mac OS, or which program was used to save it.*

Similarities Use either Acrobat or LiveCycle Designer to do any of the following:

- Use a paper document scanned to PDF as the basis of a form.
- Convert an existing electronic document to PDF, to be the basis of a form.
- Design forms, starting with a blank page. (Forms created from a PDF using the PDF Editor feature in Acrobat have limited formatting options available.)
- Run automatic form-field recognition on existing PDFs and documents converted to PDF.
- Edit PDF forms created in Acrobat.
- Create forms to distribute by email or post on a website for people to download onto their computers for completing in Acrobat or Reader or for printing and completing by hand.
- Create forms that users can complete in Acrobat or Reader and submit through email.

Differences Acrobat and LiveCycle Designer differ in these ways:

- In LiveCycle Designer, you can start with one of the blank, built-in *templates*—predesigned layouts that you edit and customize.
- You must use LiveCycle Designer to edit any forms that have been opened and saved in LiveCycle Designer, even if the form was originally created in Acrobat.
- In LiveCycle Designer, you can extend compatibility back as far as Acrobat 6.0 and Reader 6.0 for most form data fields. In Acrobat, you can extend compatibility as far as Acrobat 4.0 and Reader 4.0.
- LiveCycle Designer can create forms in formats that it can convert into HTML. This ability makes LiveCycle Designer the better application to use if you intend to post the interactive form on a website for people to fill in and submit from within a browser. You can also integrate PDF forms into existing workflows by binding forms to XML schemas, XML sample data files, databases, and web services.
- With LiveCycle Designer, you can use scripting objects, integrate a form with a data source, and create dynamic forms.

Note: *You can start LiveCycle Designer from the Windows Start menu, or from within Acrobat Professional, either by choosing Forms > Create New Form and following the wizard for creating a new form or by selecting a Forms task in the Getting Started window.*

Decisions based on form content

Planning your PDF form depends on what information will be exchanged through the form. Different types of information correspond to various form elements, which are designed especially for that kind of data.

In Windows, the choice between editing a form in Acrobat or editing it in LiveCycle Designer is also influenced by the content of the form.

Your answers to the following questions may guide your decision about what elements to include in the form layout and which application to use to create and edit the form.

What information do I need to collect from the user?

This most basic planning step depends on your goals in sending out the form.

What information should I provide to the user?

Besides providing the questions and labels for information the person filling in the form will provide, many forms identify the person or organization that originated the form and provide contact information, instructions, graphics, logos, and so forth.

If you want to edit the text or change the layout of an existing PDF form, you must edit the original source document in its native authoring application or, in Windows only, you can edit the file in LiveCycle Designer.

Do I want to receive barcoded information? (Windows)

Barcoding fields are supported by both Acrobat and LiveCycle Designer, with more options available in LiveCycle Designer.

What are the different types of information the users will submit?

PDF forms can collect many kinds of data: typed text, numbers, a single selection from limited choices, multiple selections from limited choices, and so on. The data you want to collect affects the types of form fields you use.

For example, List Box fields force users to choose just one answer from a list of limited possibilities, but you could configure radio buttons that would do the same thing. Which you use might depend on the amount of space available, usability factors, and design aesthetics.

What user-input is essential and what information can be optional?

This issue is an offshoot of your primary goal for the form. It's helpful to identify what data fields are essential and should be set up as required, as compared to data that is only supplementary for other purposes. For example, if the form is a purchase order, you cannot send the merchandise to the purchaser without a shipping address. However, if the user left a "Comments" field blank, you could still carry out the primary function of the form, so you wouldn't want to mark it as a required field.

Which form fields could benefit from information formatting?

Many types of form fields can be configured to accept only certain types of information. For example, text boxes can be set up to accept only numbers, only letters, or a combination of the two. You can restrict input to specific sequences, such as those for dates, telephone numbers, or Social Security numbers. You can create fields that automatically display calculations from other fields. You can set text field properties so that the field area scrolls, allowing users to write lengthy responses without taking up a large area of the form.

Decisions about the form's work cycle

Planning your PDF form depends on the methods you'll use for collecting data. In Windows, the planning also influences your choice between editing a form in Acrobat or editing it in LiveCycle Designer.

Your answers to the following questions may guide your decision about what elements to include in the form.

How do I want users to send back information?

The possibilities include:

- On paper or fax, to be collated manually.
- On paper or fax, to be scanned and save as an electronic document.
- On paper or fax, to be scanned and interpreted from one or more barcode fields included in the form.
- As an email attachment that includes the entire form.
- As an email attachment that includes only the form data.
- Through an Internet or network connection directly to a database.

What are the needs of those who will fill out the forms?

Consider the following factors, which affect who can fill in a form and how comfortable they are in doing so.

- Compatibility. Consider whether all members of your intended audience are likely to be using the latest version of Acrobat or Reader to fill in the form. You may need to set up the form to be compatible with earlier versions.
- Security. Especially if the form captures sensitive or personal information, consider adding security measures, such as passwords, digital signatures, or masked form data to protect you and your audience, and to prevent others from being able to access the data.
- Adobe Reader users. Consider granting Reader users extended rights for the form so they can save a copy of the completed form before submitting it.

Do I want to track response levels?

Acrobat 8 offers tracking features that you can use to keep yourself informed on the submitted data. For more information on this topic, go to the Adobe website.

Choosing form elements

Once you've determined what information you want to receive from users, you can match information types with appropriate form elements.

- For text and numeric data that the user will type in, design the form to use text boxes or combo boxes.
- For a single choice from a limited number of options, use radio buttons, a list box, or a combo box.
- For a limited number of options from which the user can select none, one, or more items, use check boxes, or use a list box and set the form field properties to allow multiple selections.

- For actions, such as opening a file, playing a sound or video, submitting form data, and so forth, use buttons.
- For added security, add a digital signature field that verifies the user's identity.

You can also make changes to individual form field properties, making it even easier and more foolproof for users filling in the PDF form.

Barcode workflow

Barcode fields translate a user's form entries into a visual pattern that can be scanned, interpreted, and incorporated into a database. Barcodes are helpful when users submit the form on paper or by fax.

The advantages of using barcodes are that they save time, eliminate the need for responses to be manually read and recorded, and bypass data-entry errors that can occur.

A typical barcode workflow includes the following phases:

- The form author makes sure that Automatically Calculate Field Values is selected in the forms preferences, and then creates the form in Acrobat, setting up all the other fields as usual.
- The form author adds the barcode field to the form, setting up the barcode so that it captures the needed data.
- The form author enables the form for Reader users (if the author wants to allow Reader users to save their own filled-in copy of the form or if it contains certain barcode fields).
- The form author distributes the form to other users.
- Users fill in the form on their computers, print a copy, and deliver the copy to the form distributor.
- The received barcode data is interpreted in one of the following ways, and can then be reviewed, sorted, and used by the form receiver:

Forms faxed to a fax server The form receiver can use Adobe Acrobat Capture to collect TIFF images from the fax server and place them in an Adobe LiveCycle Designer Barcoded Forms Decoder watched folder, if the receiver owns those products.

Forms delivered on paper The form receiver can scan paper forms and then use an application such as Adobe LiveCycle Barcoded Forms Decoder to decode the barcodes within those forms.

Note: *Acrobat Capture and LiveCycle Barcoded Forms Decoder are standalone products appropriate for enterprise workflows and are sold separately from Acrobat.*

Design tips for barcodes

Issues that affect how you design and place barcodes include usability and space. As an example, the barcode size can also limit the amount of data that can be encoded. For the best results, follow these guidelines.

- Position the barcode so that it's unlikely to get folded when placed in an envelope, and position it far enough from the edges of the page so that it won't get clipped off during printing or faxing.
- Position it so that it can be easily seen and scanned. If a handheld scanner will be used, avoid barcodes wider than 4 inches (10.3 cm). Tall, narrow barcodes generally work best in this case. Also, avoid compressing the contents of the barcode when using a handheld scanner.
- Make sure that the size of the barcode can accommodate the amount of data to encode. If the barcode area is too small, it turns a solid gray. Be sure to test a completed form before distributing it to make sure that the barcode area is large enough.

See also

"Create, test, and edit barcode fields" on page 219

"Manage custom barcode settings" on page 230

Form elements in Acrobat

A PDF form created with Acrobat can contain the following types of elements:

Barcodes Encode the input from selected fields and display it as a visual pattern that can be interpreted by decoding software or hardware (available separately).

Buttons Initiate a change on the user's computer, such as opening a file, playing a sound, or submitting data to a web server. These buttons can be customized with images, text, and visual changes triggered by mouse actions.

Note: *Action buttons have a different purpose than radio buttons, which represent data choices made by the user.*

Check boxes Present yes-or-no choices for individual items. If the form contains multiple check boxes, the user can typically select as many or few of these as wanted.

Combo boxes Let the user either choose an item from a pop-up menu or type in a value.

Digital signature field Lets the user electronically sign a PDF document with a digital signature.

Document message bar Displays automatically generated information about the PDF form and can display action buttons and other options. The document message bar also informs Reader users about their usage rights for the form.

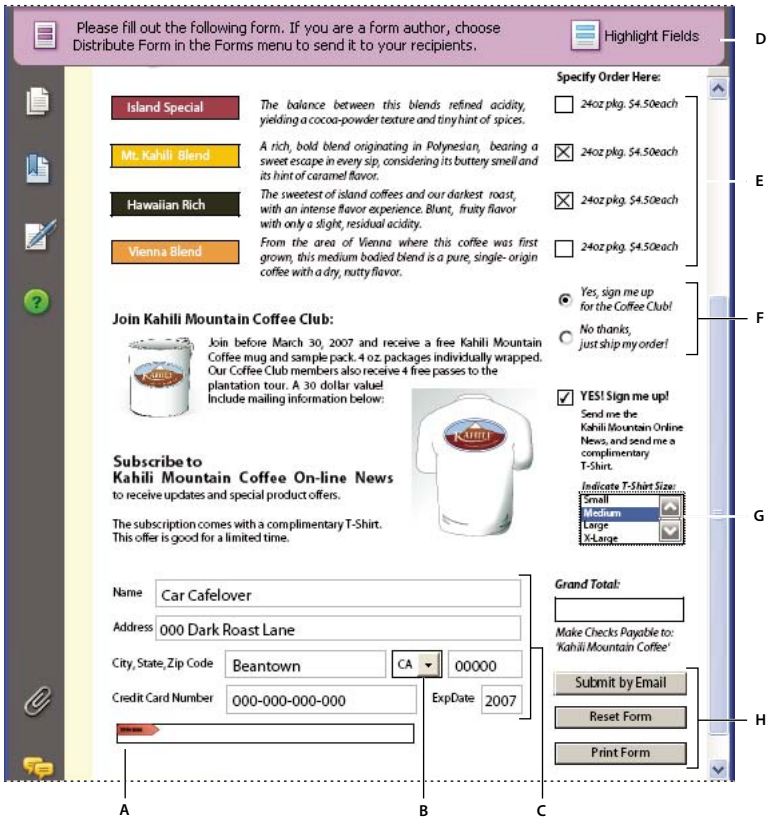
Note: *If form recipients are using older versions of Acrobat or Reader, the document message bar may not be visible or may contain different information.*

List boxes Display a list of options the user can select.

Note: *You can set a form field property that enables the user to Shift-click or Ctrl-click/Control-click to select multiple items on the list.*

Radio buttons Present a group of choices from which the user can select only one item.

Text boxes Let the user type in text, such as name, address, or phone number.



Adobe Acrobat PDF form
A. *Digital signature field* ***B.*** *Combo box* ***C.*** *Text boxes* ***D.*** *Forms document message bar* ***E.*** *Check boxes* ***F.*** *Radio buttons* ***G.*** *List box* ***H.*** *Buttons*

See also

"Setting action buttons in Acrobat" on page 232

"Enable Reader users to save form data" on page 213

Creating and editing forms

Creating new forms

You can add interactive form fields to a PDF by using the extensive form tools in LiveCycle Designer (Windows) or the basic form tools in Acrobat Professional.

LiveCycle Designer is a standalone application that is included with Acrobat Professional for Windows or can be purchased separately.

In Windows, you can initiate the process of creating a LiveCycle Designer form either from within that application or from Acrobat, using the Create New Forms wizard.

In Acrobat, you can initiate the process of creating an Acrobat form by clicking either Convert An Existing Document or Scan A Paper Form in the Getting Started window, or by opening an existing PDF and choosing Forms > Run Form Field Recognition.

Note: *PDF form fields that were created in Acrobat Professional can be modified in LiveCycle Designer, but PDF form fields that were created in LiveCycle Designer can't be modified in Acrobat Professional.*

See also

"Using Acrobat versus LiveCycle Designer (Windows)" on page 207

About the Create New Forms wizard

The Create New Forms wizard initiates the process of creating a form in LiveCycle Designer. Forms saved in LiveCycle Designer can be opened and distributed in Acrobat, but you cannot use the Acrobat Forms toolbar or other Acrobat forms features to edit a LiveCycle Designer form.

There are several ways to start the Create New Forms wizard from the Acrobat work area: from the Acrobat Forms menu, the Acrobat File menu, or from the Forms page of the Getting Started window, by clicking Browse The Template Library or Create New Form.

Each page in the wizard contains complete instructions on how to proceed. For information on how to edit forms in LiveCycle Designer, refer to LiveCycle Designer Help by starting the LiveCycle Designer application and choosing Help > Adobe LiveCycle Designer Help.

Enable Reader users to save form data

Ordinarily, Reader users can't save filled-in copies of forms that they complete. However, you can extend rights to Reader users so they have the ability to do so. These extended rights also include the ability to add comments, use the Typewriter tool, and digitally sign the PDF.

1. Choose Advanced > Enable User Rights In Adobe Reader.
2. Read the instructions that appear, and then click Save Now.

These extended privileges are limited to the current PDF. When you create a different PDF form, you must perform this task again if you want to enable Reader users to save their own filled-in copies of that PDF.

Creating secure PDF forms

PDF forms can be secured in the same ways and by the same methods as other PDFs. Security can be especially important when sensitive information is included in the form.

See also

"Securing PDFs" on page 263

"About digital IDs" on page 253

Make Adobe PDF forms accessible (Acrobat)

You can make form fields accessible to vision- and motion-challenged users by adding tags to the PDF and by properly structuring it. In addition, you can use the Tooltip form field property to provide the user with information about the field or to provide instructions. For example, using the Tooltip property's value, the screen reader could say "Your name." Without the Tooltip property, a screen reader simply names the type of form field.

1. If necessary, choose Forms > Edit Form In Acrobat, and make sure that the Select Object tool is selected.

Note: *If the Forms menu shows the Edit Form In LiveCycle Designer command, then use the corresponding procedure for that application. See LiveCycle Designer Help.*

2 Do one of the following to open the form field's Properties window:

- Double-click a selected form field.
- Click the More button in the Properties toolbar. (If this toolbar is hidden, choose View > Toolbars > Properties bar.)

3 In the General tab, type a description into the Tooltip box.

See also

"Accessibility features" on page 287

Adding JavaScript to forms

The JavaScript language lets you create interactive web pages. Adobe has enhanced JavaScript so that you can easily integrate interactivity into PDF forms. The most common uses for JavaScript in Acrobat Professional forms are formatting, calculating, validating data, and assigning an action. In Windows, you can also configure Adobe PDF forms to connect directly to databases using Open Database Connection (ODBC). For more information, see the *JavaScript™ for Acrobat® API Reference* on the JavaScript support page (English only) of the Adobe website.

Note: *If you're creating dynamic forms, keep in mind that Reader doesn't support some custom JavaScripts, so the form may not function properly when viewed in Reader unless additional usage rights are added to the PDF.*

For information on customizing Acrobat, see the Acrobat Software Development Kit (SDK). The Acrobat SDK is provided to members of the Adobe Solutions Network (ASN) Developer Program. For information on this SDK, visit the Adobe Acrobat SDK page (English only) on the Adobe website.

See also

"Enable commenting for Adobe Reader users" on page 155

Laying out new form fields

Create form fields in Acrobat

In Acrobat, you create a form field by choosing one of the form tools, dragging on the document page to define the size and location of the field, and naming the field. For each field type, you can set a variety of options through the form field Properties dialog box.

Note: *In Windows, you can use LiveCycle Designer to edit forms that were created in Acrobat, but Acrobat can't edit form fields that have been opened and saved in LiveCycle Designer. LiveCycle Designer offers additional features and possibilities than are available in Acrobat alone. However, there are some situations in which Acrobat forms are preferable.*

See also

"Using Acrobat versus LiveCycle Designer (Windows)" on page 207

"Form fields behaviors" on page 222

Create a new form field

1 Do one of the following:

- Choose Forms > Edit Form In Acrobat.
- Choose View > Toolbars > Forms.

2 In the Forms toolbar, select a forms tool, and do one of the following:

- Drag to create a form field of the required size.
- Double-click the page to create a form field using the default size.

Note: *You cannot create a form field on top of a comment.*

3 In the [*form field name*] Properties dialog box, which opens automatically, select property options to specify the form field behavior.

To add form fields to a PDF document's tags tree at the same time that you create the form fields in Acrobat, make sure that Tag Annotations is selected in the Options menu of the Tags tab. Select the item in the tags tree that should be the parent of the form field you're about to create, and create the form field.

Create multiple copies of form fields

You can create multiple copies of form fields even if the fields have different types. The new form field names are based on the original form fields and appended with a number. All new fields are created sequentially, using standard array format.

1 Select one or more form fields that you want to copy.

2 Choose Forms > Edit Fields > Place Multiple Fields.

3 In the Create Multiple Copies Of Fields dialog box, do the following:

- To specify the number of rows to be created, enter a number in Copy Selected Fields Down.
- To specify the number of columns to be created, enter a number in Copy Selected Fields Across.
- To specify the width of the area in which the columns of fields appear, enter a number in Change Width.
- To specify the height of the area in which the columns of fields appear, enter a number in Change Height.

Note: *The width and height values don't change the dimensions of individual fields but designate the size of the entire area for all of the selected and newly created fields.*

- To change the position of the fields, use the Up, Down, Left, and Right buttons.

4 Click Preview to apply the results, make any additional changes, and click OK.

Note: *Copies of form fields function independently of each other. You can use a different procedure to duplicate form fields, creating an information-sharing relationship among these form fields.*

Lay out Acrobat form fields on a grid

You can use grids to help position form fields precisely on a page. You can define the grid spacing, color, and position. You can also choose whether to have the boundaries of a form field snap to grid lines when you're editing the form field. Grid lines don't print.

1 Choose View > Grid.

2 To make form fields snap to the nearest grid lines when you create or move them, choose View > Snap To Grid.

Copy an Acrobat form field

You can create *copies* of a form field on a single page of a PDF form and you can copy a form field and paste it onto other pages. When you create *duplicate* form fields, replicas of the original field are added to one or more other pages, always in the same position on each page as the original. Both copies and duplicates can be dragged to different locations on a page, but not from one page to another.

Both copies and duplicates are created with the same name as the original form field, but with a number appended. All form fields with the same basic name share the same user data and action properties. Consequently, when a user adds or edits a response to any one of the copies or duplicates, that response appears in all fields with the same basic name.

If you change the properties of any one of multiple versions of a form field that have the same basic name—such as the appearance or behavior options for the selected form field—those changes affect only that copy of the form field. The exception is when you change an Actions listing if the trigger isn't a mouse action.

If you want to prevent a duplicated or copied form field from reacting in unison with the original field to user-entered responses, change the name of the new form field using the General tab in form field Properties dialog box.

Create a copy of a form field

❖ Select the form field, and do one of the following:

- To copy the form field to the center of the current view, choose Edit > Copy, and then choose Edit > Paste.
- To copy the form field and move it to another location on the page, Ctrl-drag/Option-drag it.

To constrain the vertical or horizontal movement as you drag, press Shift.

Create multiple copies of a form field on a page

1 Do one of the following:

- Select the form field and choose Forms > Edit Fields > Place Multiple Fields.
- Right-click/Control-click the form field and choose Create Multiple Copies.

2 In the Create Multiple Copies Of Fields dialog box, select Preview, and move the dialog box as needed so that you can see the original field and the copies on the form page.

3 Make the selections you want to apply:

- To change the number of copies being created, enter different values in the Copy Selected Fields Down and Copy Selected Fields Across options.
- To change the dimensions of the original field and all the copies, enter different values in the Change Width and Change Height options.
- To move the original field and all the copies, click the Up, Down, Left, and Right buttons.

Duplicate a form field across multiple pages

1 Select the form field that you want to duplicate.

2 Choose Forms > Edit Fields > Duplicate.

Note: *The Duplicate command isn't available for forms with only one page.*

3 Do one of the following:

- To duplicate the form field on every page in the form, select All, and click OK.

- To duplicate the form field on a limited range of pages, click the From button, and type the start and ending pages on which you want the form field to appear.

Note: *Including or not including the page on which the form field originally appears doesn't affect the duplication process. Including that page won't create a second copy on top of the original one, and not including it won't remove the original form field.*

Select multiple form fields in Acrobat

Selecting multiple form fields is an essential step in several tasks you can perform, such as creating copies, aligning form fields, and adjusting the spacing between form fields.

❖ If necessary, choose Forms > Edit Form In Acrobat, and then do any of the following:

- To select all form fields of all types, choose Edit > Select All.
- To select a range of form fields, click the first form field in the range, and then Shift-click the last form field. All form fields between the two form fields are selected.
- To select individual form fields in different parts of the PDF page, Ctrl-click/Command-click each form field.
- To select all form fields in an area of the page, use the Select Object tool to drag a selection marquee around the area.
- To select all form fields of a specific type in an area of the page, select the forms tool for that type of field and drag a selection marquee around the area. For example, if you select the Radio Button tool, only radio button form fields are selected.
- To deselect an individual form field, Ctrl-click/Command-click that field.

The form field highlighted in red is the *anchor*. When you select multiple form fields by clicking, the last field selected is the anchor. When you use a marquee, the form field that was created first is the anchor. If you Ctrl-click/Command-click to deselect the anchor, the form field located in the upper left of the selection becomes the new anchor form field.

Resize and arrange form fields in Acrobat

After you create form fields, you may need to rearrange, resize, or move them to give the page a cleaner, more professional look.

To make adjustments in the layout of form fields, you must be in editing mode (choose Forms > Edit Form In Acrobat or choose Tools > Advanced Editing > Select Object Tool).

Resize a form field

1. Select either the Select Object tool or the form tool that was used to create the form field.
2. Select the form field that you want to resize.
3. Do any of the following:

- To resize the field manually, click to select the form field, and then drag a border handle. Press Shift to maintain the current aspect ratio of the form field.
- To resize the field by 1 pixel, press Ctrl+Arrow key/Command+Arrow key; to resize the fields by 10 pixels, press Ctrl+Shift+Arrow key/Command+Shift+Arrow key.

Resize multiple form fields to match a selected form field

1. Select all the form fields that you want to resize.

2 Right-click/Control-click the form field that you want the other selected form fields to match, choose Size, and then select one of the following:

Height Adjusts the heights without changing the widths.

Width Adjusts the widths without changing the heights.

Both Adjust all widths and heights to match.

Move individual form fields

You can move form fields by simply dragging them. For greater precision in less time, you can use special features that align them with each other, adjust the spacing between them, and center them on the page.

1 Using the Select Object tool, select one or more form fields that you want to move.

2 Do one of the following:

- To move to an approximate location, drag the selected form fields to the new location.



To constrain movement to a horizontal or vertical direction, begin dragging, and then press Shift while continuing to drag the selection.

- To move either horizontally or vertically in small increments, press the arrow keys to nudge the selected form field into position.
- To move the form field to the exact center of a page, choose Edit > Cut, navigate to the desired page, and then choose Edit > Paste.

Note: *Fields are placed in the center of the page only the first time they're pasted. Additional pasted fields are offset from the previously pasted field.*

Align and center multiple form fields

1 Select two or more form fields that you want to align.

2 Right-click/Control-click the field to which the others will align, choose Align, and then choose a command as follows:

- To align a column of fields, choose Left, Right, or Vertical to align them respectively to the left edge, right edge, or vertical axis (center) of the anchor form field.
- To align a row of fields, choose Top, Bottom, or Horizontally to align them respectively to the top edge, bottom edge, or horizontal axis (center) of the anchor form field.

Note: *When you right-click/Control-click one of the selected fields, it's highlighted in red instead of blue, indicating that it's the anchor form field. The Align menu commands move the other selected form fields to line up with the edges of the anchor form field.*

Adjust the spacing between form fields

In the context of laying out form fields on a page, *distributing* means to give a group of form fields uniform spacing, measured from the centers of adjacent fields. The Distribute commands take precedence over the Snap To Grid command.

1 Press Shift and select the form fields that you want to adjust.

2 Right-click/Control-click any one of the selected form fields, and do one of the following:

- To distribute the fields evenly between the topmost and bottommost fields, choose Distribute > Vertically.
- To distribute the fields evenly between the leftmost and rightmost fields, choose Distribute > Horizontally.

Note: *The Distribute button in the Forms toolbar has a different function: Use that button to send your form to others, who will fill in the information and return the data to you.*

Delete a form field

1 Select the form fields you want to delete.

2 Press Delete, or choose Edit > Delete.

Create, test, and edit barcode fields

One of the ways in which you can improve a PDF form barcode is by creating custom scripts. Writing such scripts requires a basic competency with JavaScript and a familiarity with Acrobat-specific JavaScript. For information, see *Developing Acrobat® Applications Using JavaScript™* on the JavaScript support page (English only) of the Adobe website. For information about basic JavaScript, refer to any of the many resources available on that subject.

After inserting a barcode of maximum size, changing the cell size or decode condition may cause the barcode to cross the page borders. Avoid this behavior by selecting the appropriate cell size and decode conditions for the barcode.

See also

"Design tips for barcodes" on page 210

"Manage custom barcode settings" on page 230

"Value tab for form field properties" on page 230

"Options tab for form field properties" on page 224

Add a barcode field

1 Open the form in Acrobat, choose Edit > Preferences and select Forms on the left. Then select Automatically Calculate Field Values.

2 Click the Barcode tool in the Forms toolbar, or choose Tools > Forms > Barcode Tool.

3 Drag a rectangle to define the barcode area. The Barcode Field Properties dialog box opens.

4 In the Value tab, do one of the following:

- Select Encode Using, and then select a format (XML or Tab Delimited). Click the Pick button and select the fields that you want to be encoded in the barcode field. If you don't want to include the field names in the barcode data, deselect Include Field Names.
- Select Custom Calculation Script, click Edit, and then enter your custom JavaScript code in the JavaScript Editor dialog box.

5 In the Options tab, do all of the following:

- Select a Symbology option: PDF417, QR Code, or Data Matrix.
- Select Compress Data Before Encoding To Barcode if you want to apply this compression. Do not select this option if a handheld scanner will be used to capture data from returned forms.
- In Decode Condition, choose the type of hardware that will process returned forms: Handheld Barcode Scanner, Fax Server, Document Scanner, or Custom.
- If necessary, click Custom and enter values for X Dimension, Y/X Ratio, and Error Correction Level.

6 Make any other changes in the General and Actions tabs. Then click OK to close the Barcode Field Properties dialog box.

JavaScript code is generated automatically to encode the selected fields in the XML or Tab Delimited format, the Barcode Field Properties dialog box closes, and the barcode for which you specified values appears on the form.

Note: *If you add a new field to a form after you have created the barcode, the new field will not automatically be included in the data for existing barcodes. However, you can manually include additional data fields in the barcode.*

Test a barcode field

1 Choose Forms > Edit Form In Acrobat to deselect it, or click the Preview button in the Forms toolbar.

2 Fill in the form, using sample data that represents the maximum amount of information that a each field allows or that you expect any user might enter.

3 If the barcode field is grayed out, follow either the procedure for resizing the barcode field or for adjusting the content data. (See the following tasks.)

4 When you are sure that the barcode field area is large enough to contain all of the incoming data, choose Forms > Clear Form, to remove the sample data, and then choose File > Save.

The barcode form field is now ready for distribution.

Include additional data fields in the barcode

1 Using either the Barcode tool or the Select Object tool, select the barcode field and choose Forms > Show Field Properties.

2 In the Value tab, do one of the following:

- If Encode Using is selected, click Pick, and select additional form fields to be encoded.
- If Custom Calculation Script is selected, click Edit, and write additional JavaScript to include the additional fields.

After including new data fields in the barcode, be sure that the barcode area is large enough by testing sample data. If the barcode area is grayed out, adjust the barcode size, barcode properties, or text field properties so that the data content fits into the barcode area.

Resize a barcode field

The most common error when authoring barcoded forms is when the barcode area is too small to accommodate the data. If this occurs during your test of sample data, the barcode appears as a solid gray rectangle instead of showing its coding pattern.

1 Select the Barcode tool , and select the barcode field.

Important: *Be sure to use only the Barcode tool to resize a barcode. If you resize a barcode using the Text Field tool or the Select Object tool, the barcode can be distorted and becomes unusable.*

2 Drag a handle along the edges or corners of the barcode field frame.

3 If necessary, drag the barcode from inside its frame to move it to another location on the page.

Adjust data content to fit in a barcode field

1 To edit the barcode properties so that it can accommodate more data, select it, choose Forms > Show Field Properties, and do any of the following:

- In the Options tab, click the Custom button and enter lower values for Error Correction Level and Y/X Ratio.
- In the Options tab, select Tab Delimited rather than XML as the data-encoding format. XML requires more barcode area to encode information than Tab Delimited does.

- In the Options tab, select Compress Data Before Encoding To Barcode, but only if you will be using an Adobe software decoder (available separately).
- In the Options tab, select a different Symbology option.
- In the Value tab, click the Pick button, and deselect any fields that you don't need to encode. For example, don't include fields with redundant information
- In the Value tab, enter a custom script that converts user-entered text to either all lowercase or all uppercase characters during the encoding process.

Note: *The National Association of Computerized Tax Processors (NACTP) guidelines, used by the United States Internal Revenue Service and state tax agencies, recommend using all uppercase characters for 2D barcode data*

2 To edit a text field to minimize the amount of barcode area needed to contain the data, select the text field, choose Forms > Edit Field Properties, and do either of the following:

- In the Options tab, enter a value (or reduce the existing value) for Limit Of Characters.
- In the Validate tab, write a custom script that restricts data to alphanumeric characters and to a single case. (Text that is either all uppercase or all lowercase requires less barcode area than the same text written in a mixture of uppercase and lowercase characters.)


Consider creating additional barcode fields in the form and mapping different data to each barcode field.

Set form-field tabbing order in Acrobat

If a PDF document isn't tagged and doesn't have a specified tab order, the order in which the form fields were created determines their tabbing order. If a PDF document is tagged, the document structure determines the form fields' tabbing order unless the user has deselected the Tab Order option in the Accessibility preferences.

You can change the tabbing order after you create the fields in either of two ways: by setting the tabbing order in the Page Properties, or manually.

See also

"Creating new forms" on page 212

"Make Adobe PDF forms accessible (Acrobat)" on page 213

Set tabbing order in Page Properties

1 Click the Pages button or choose View > Navigation Panels > Pages to open the Pages panel.

2 Select one or more page icons, and choose Page Properties in the Pages panel Options menu.

3 Select a Tab Order option:

Use Row Order Tabs from the upper left field, moving first left to right and then down, one row at a time.

Use Column Order Tabs from the upper left field, moving first from top to bottom and then across from left to right, one column at a time.

Use Document Structure For forms with tagged fields, follows the order set up in the tagging.

Unspecified Uses the existing sequence. For untagged forms, this is the order in which the fields were created.

Reset tabbing order automatically

1 Choose Forms > Edit Fields > Set Tab Order.

Note: *You can choose this command only if the tab order property in the Page Properties is set to Unspecified.*

2 Click Yes in the message that appears to automatically determine the tab order.

Set tabbing order manually

1 Choose Forms > Edit Fields > Set Tab Order.

Note: *You can choose this command only if the tab order property in the Page Properties is set to Unspecified. You can verify this by selecting the page in the Pages panel and choosing Page Properties in the Pages panel Options menu or context menu.*

2 Click No in the message that appears.

Numbers representing the tabbing order for the fields appear in the upper left corner of each field.

Note: *If you decide not the change the tabbing order, click a blank area of the page or a part of the page that is not part of a field. This hides the tabbing order numbers so that clicking a field no longer changes the tabbing order.*

3 Click anywhere in the field that you want to be first in the tabbing order.

The number in the upper left corner is set as 1.

4 Click each of the other fields in the order that you want tabbing to occur.

Form fields behaviors

About Acrobat form field properties

How a form field behaves is determined by settings in the Properties dialog box for that individual field. You can set properties that apply formatting, determine how the form field information relates to other form fields, impose limitations on what the user can enter in the form field, trigger custom scripts, and so forth.

You can set a variety of properties for an Acrobat form field, depending on the form field type. The properties for each type of form field are selected on a series of tabs.

All types of form fields have a General tab, Appearance tab, and an Actions tab. Other tabs appear only in specific types of form fields. The Options tab appears for most form field types but the options available are unique to each type of form field.

Two items are available on every tab. If you select one on any tab, a check mark will appear, and the option will be checked on all tabs. These are:

Locked When selected, prevents any further changes to any form field properties.

Close Applies and saves the current form field properties, and closes the form field Properties dialog box.

Note: *If you select Locked on any tab, it locks all options for the field, not just the options on that tab.*

Modify form field properties in Acrobat

You can access Acrobat form field properties only when you are in editing mode (by choosing Forms > Edit Form In Acrobat or Tools > Advanced Editing > Select Object Tool). You can change the properties for multiple form fields at a time.

Note: *Some basic options can be changed on the Properties toolbar, which you can open or hide by choosing View > Toolbars > Properties Bar.*

1 Open the Properties dialog box using one of the following methods:

- To edit a single form field, double-click it or right-click/Control-click it and choose Properties.
- To edit multiple form fields, select the fields that you want to edit, right-click/Control-click one of the selected fields, and choose Properties.

2 Make changes to the properties on each of the available tabs, as needed.

3 Click Close to apply and save the changed properties to the selected form fields.

If you select form fields that have different property values, some options in the Properties dialog box are not available. Otherwise, changes to the available options are applied to all selected form fields.



To avoid accidental changes to the form field, select Locked in the lower left corner of the Properties dialog box before you close it. To unlock, click the check box again.

See also

"Setting action buttons in Acrobat" on page 232

General tab for form field properties

The General tab appears for all types of form fields and includes the following options:

Name Specifies the unique name of the selected form field.

Tooltip Displays text that the hesitant user may find helpful in filling in the form field. Tooltips appear when the pointer hovers briefly over the form field.

Form Field Specifies whether the form field can be seen, either on screen or in print. The choices are: Visible, Hidden, Visible But Doesn't Print, and Hidden But Printable.

Orientation Rotates the form field by 0, 90, 180, or 270 Degrees

Read Only Prevents the user from changing the form field content.

Required Forces the user to fill in the selected form field. If the user attempts to submit the form while a required field is blank, an error message appears and the empty required form field is highlighted.

Appearance tab for form field properties

Appearance properties determine how the form field looks on the page. The Appearance tab appears for all types of form fields and includes the following options:

Border Color Opens a color picker in which you can select a color swatch for the frame surrounding the field. To leave the field without a frame, select No Color.

Line Thickness Specifies the width of the frame surrounding the form field: Thin, Medium, or Thick.

Fill Color Opens a color picker in which you can select a color swatch for the background behind the field. To leave the field uncolored, select No Color.

Note: *A Fill Color choice other than No Color will block any images on the PDF page that are behind the form field.*

Line Style Alters the appearance of the frame. Select Solid, Dashed, Beveled, Inset, or Underline.

Font Size Sets the size of user-entered text or of the selection marker for radio buttons and check boxes. The choices include Auto, various preset values, and typing in a different value.

Text Color Opens a color picker in which you can select a color swatch for the text or selection marker.

Font Lists the fonts available on your computer. This option is not available for form fields that do not display text.

Note: *The Enable Right-To-Left Language Options in the International panel of the Preferences dialog box affects what appears in the Appearance tab of the Properties dialog box. When that preference is selected, the Appearance tab includes options for changing the digit style (Western or Arabic-Indic) and text direction for text fields, combo boxes, and list boxes.*

Options tab for form field properties

The options available on this tab change according to the type of form field selected. The Options tab appears for all form field types except digital signatures.

Barcode

The Options tab for barcode field properties contains the following:

Symbology Includes the PDF417, QR Code, and Data Matrix barcode types.

Note: *If your organization processes forms by multiple methods, select the method that accommodates the lowest quality barcode images. For example, if forms will be returned by fax and mail, choose Fax Server as the decode condition to ensure high read rates on all forms.*

Compress Data Before Encoding To Barcode Specifies that data will be compressed before it is encoded. Data is compressed with the Flate compression method. Compressed data usually requires less storage space in the barcode, allowing more data to be stored. In general, select this option if you will use the Acrobat barcode forms decoder to interpret the returned data. Do not select this option if you will use a handheld barcode scanner, because most of these cannot decode compressed data.

Decode Condition The preset decode conditions represent recommended starting points that you can adjust by clicking the Custom button.

Custom Opens a dialog box in which you can select custom processing parameters that are best for your specific scanning and faxing hardware. (The available options vary according to barcode types.)

- **X Dimension** Width, in mils (1 mil = 0.001 inch or 0.0254mm), of the cell.

- **Y/X Ratio** Height/width ratio of the cell. For example, for a data cell that is twice as high as it is wide, enter 2. (Available only for PDF417 barcodes.)

Note: *If you are planning to decode the barcode using a handheld laser scanner, avoid creating barcodes wider than 4 inches (10.2 cm). Taller and narrower barcodes generally work better with handheld scanners. Barcode height and width will not be an issue if you are using an Adobe barcode decoder (available separately).*

- **Error Correction Level** Corresponds to the level of data redundancy that is added to the barcode to correct any potential decoding errors. Higher levels provide more redundancy and a more robust barcode that will generate more successful decode results. However, higher levels will also result in a larger barcode and a reduced ability to encode user-supplied or form structure data into the barcode. A more robust barcode can reduce problems created by pen marks, poor print quality, degradation caused by fax transmission, or folds in the document. This option is available for PDF417 and QR Code barcodes.

Manage Barcode Parameters Enables you to save your custom barcode selections in a file. You can then export the file and make it available to other form authors in your organization.

Check boxes

Check Box Style Specifies the shape of the marker that appears inside the check box when the user selects it: Check (the default), Circle, Cross, Diamond, Square, or Star. This property does not alter the shape of the check box itself.

Note: *The size of the marker inside the check box is determined by the size of the font you specify in the Appearance tab.*

Export Value Specifies a value to represent the item if the data will be exported. If left blank, the entry for Name in the General tab is used as the export value.

Check Box Is Checked By Default Shows the check box selected unless the user deselects it.

Combo box and list box

For either combo boxes or list boxes, you use the Options tab to create a list of items from which the user selects.

Although most of the properties on this tab are common to both these types of form fields, a few are exclusive to one type or the other.

Item Accepts the text that you type for options that you want to appear in the menu for the field.

Add Moves the current entry in Item to the Item List.

Export Value Where you type in a value to represent the item if the data will be exported. If left blank, the entry for Name in the General tab is used as the export value.

Item List Displays the choices that will be available in the list.

Note: *The highlighted item in the Item List box appears as the default selected item in the combo box field. To change the default item, highlight another item from the list.*

Up and down arrows Change the order in which the items are listed in the combo-box list. These buttons are not available if Sort Items is selected.

Note: *The highlighted item in the Item List box appears as the default selected item in the combo box field. To change the default item, highlight another item from the list.*

Delete Removes the selected item from the list.

Sort Items Arranges the listed items numerically and alphabetically. A numerical sort (if applicable) is performed before an alphabetical sort.

Allow User To Enter Custom Text (Combo boxes only) Enables users to enter a value other than the ones in the list.

Check Spelling (Combo boxes only) Checks the spelling of user-entered text. This option is available only if Allow User To Enter Custom Text is selected.

Multiple Selection (List boxes only) Enables users to choose more than one item in the list.

Commit Selected Value Immediately Saves the value as soon as the user selects it. If this option is not selected, the value is saved only when the user tabs out of the current field or clicks another form field. For list boxes only, this option is not available if Multiple Selection is selected.

Radio buttons

Button Style Specifies the shape of the marker that appears inside the button when the user selects it: Check, Circle (the default), Cross, Diamond, Square, or Star. This property does not alter the shape of the radio button itself.

Export Value Identifies the radio button and differentiates it from other radio buttons that share the same Name value.

Button Is Checked By Default Sets the selection state of the button when the user first opens the form.

Buttons With The Same Name And Value Are Selected In Unison Allows single-click selection of multiple related radio buttons. For example, if the user selects a radio button that has the same field name and export value as another, both radio buttons are selected.

Text Fields

Text fields accept user input, which can be alphabetic characters, numbers, or both.

Alignment Aligns the text left, right, or center within the field.

Default Value Specifies the text that appears until the user overwrites it by typing in the field. Enter the default value by typing in this option.

Multi-line Allows more than a single-line entry in the text field.

Scroll Long Text Compensates for text that extends beyond the boundaries of the text field.

Allow Rich Text Formatting Allows users to apply styling information to the text, such as bold or italic. This might be useful in certain text fields where such styling information is important to the meaning of the text, such as an essay.

Limit Of Characters Allows entries of up to the number of characters you specify.

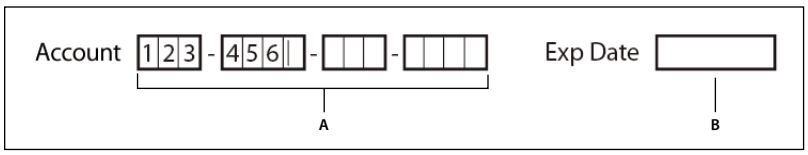
Note: *If you entered a default value, that value is clipped to this limit.*

Password Displays the user-entered text as a series of asterisks (*). This option is available only if Check Spelling is deselected.

Field Is Used For File Selection Allows the user to enter a file path as the field's value when a file is submitted along with the form. This option is available only when Scroll Long Text is the only selected option in the Options tab.

Check Spelling Checks the spelling of user-entered text.

Comb Of Characters Spreads the user-entered text evenly across the width of the text field. If a border color is specified in the Appearance tab, each character entered in the field is separated by lines of that color. This option is available only when no other check box is selected.



Text fields with and without the Comb property
A. *Four text fields with a border color, using the Comb property* ***B.*** *Text field without the Comb property*

Actions tab for form field properties

Actions properties specify any actions that you want to associate with the form field, such as jumping to a specific page or playing a media clip. The Actions tab appears for all types of form fields and includes the following options:

Select Trigger Specifies the user action that initiates an action: Mouse Up, Mouse Down, Mouse Enter, Mouse Exit, On Focus, or On Blur.

Select Action Specifies the event that occurs when the user triggers the action: Execute A Menu Item, Go To A 3D View, Go To A Page View; Import Form Data, Open A File, Open A Web Link, Play A Sound, Play Media (Acrobat 5 Compatible), Play Media (Acrobat 6 And Later Compatible), Read An Article, Reset A Form, Run A JavaScript, Set Layer Visibility, Show/Hide A Field, and Submit A Form.

Add Opens a Browse-for-file window.

Actions Displays the list of triggers and actions that you've defined.

Up and down arrows Change the order in which the selected action appears listed under the trigger. (Available only when you have defined multiple actions for the same trigger.)

Edit Opens a dialog box with specific options for the selected action.

Delete Removes the selected action or trigger-action pair.

Calculate tab for form field properties

The Calculate tab appears in the Properties dialog boxes for only text boxes and combo boxes. Use these options to perform mathematical operations on existing form field entries and display the result.

Value Is Not Calculated Select this if you want the user to type.

Value Is The Select this to make further options available:

- **Pop-up Menu** Lists the mathematical functions to apply to the selected fields. Choose Sum to add the values entered in the selected fields, Product to multiply them, Average, Minimum, or Maximum.
- **Pick** Opens a dialog box with a list of the available fields in the form that you select to add or deselect to remove from the calculation.

Simplified Field Notation Uses JavaScript with field names and simple arithmetic signs. The Edit button opens a dialog box in which you can write, edit, and add scripts.

Custom Calculation Script Displays any custom scripts you have added for calculations. The Edit button opens a dialog box in which you can write and add new JavaScripts.

Set the calculation order of form fields

When you define two or more calculations in a form, the order in which they are carried out is the order in which you defined the calculations. In some cases, you may need to modify the calculation order to obtain correct results.

For example, if you wanted to use the result obtained from calculating two form fields to calculate the value of a third form field, the first two form fields must be calculated together first to obtain the correct final results.

1 Choose Forms > Edit Fields > Set Field Calculation Order.

The Calculate Fields dialog box displays all calculable fields in your form and the order in which the calculations are performed.

2 To change the field calculation order, select the field from the list, and then click the Up or Down button as needed.

Acrobat automatically performs all assigned field calculations when you are creating and testing your form fields. For convenience while you work, you can turn off automatic calculation in the forms preferences.

Signed tab for form field properties

The Signed tab is available only in the Digital Signature Properties dialog box. Selections made here determine what happens when the user applies a digital signature to the form.

Nothing Happens When Signed This is the default.

Mark As Read-Only Prevents further changes to the digitally signed form, according to the selection in the pop-up menu:

- **All Fields** Prevents any changes to any form field.

• **All Fields Except These** Allows changes only to the form fields you select by clicking the Pick button and selecting check boxes for the fields that you want the user to be able to edit after signing.

• **Just These Fields** Prevents changes in only the form fields you pick.

This Script Executes When Field Is Signed Activates a custom JavaScript when the user digitally signs the form. Use the Edit button to change or create a new JavaScript action.

See also

"Adding JavaScript to forms" on page 214

Format tab for form field properties

The Format tab appears in the Properties dialog box for only text form fields or combo box form fields. The options that are available depend on your selection in the Select Format Category pop-up menu.

None

No additional options are available. The input in a text or combo box with this property does not require any specific formatting.

Number

Automatically imposes the selected formatting options on numeric data entries.

Decimal Places Sets the number of digits that appear to the right of the decimal point.

Separator Style Sets the placement of commas and periods.

Currency Symbol Sets the type of currency, such as Euros, Dollars, or Yen.

Negative Number Style Sets how negative numbers are displayed. You can choose Show Parentheses, Use Red Text, neither, or both.

Percentage

Automatically imposes the selected formatting options on numeric data expressed as a percentage.

Decimal Places Sets the number of digits that appear to the right of the decimal point

Separator Style Sets the placement of commas and periods.

Date

List includes one-, two-, and four-digit variations where *d* stands for the day, *m* stands for month, and *y* stands for year.

Time

List includes display variations where *h* stands for the hour on a 12-hour clock, *H* stands for the hour on a 24-hour clock, *MM* stands for minutes, *ss* stands for the seconds, and *tt* stands for AM or PM.

Special

Zip Code For a five-digit U.S. postal code.

Zip Code + 4 For a nine-digit U.S. postal code.

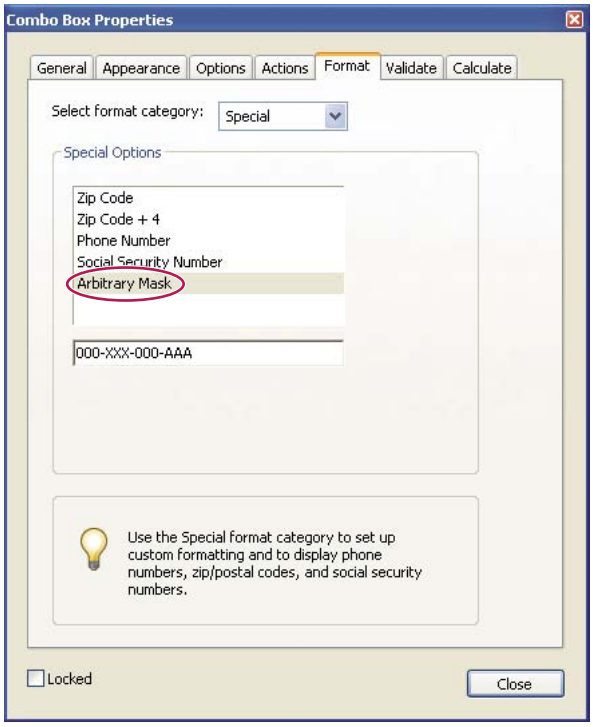
Phone Number For a ten-digit telephone number.

Social Security Number For a nine-digit U.S. Social Security Number. Hyphens are inserted automatically after the third and fifth digits.

Arbitrary Mask Changes the format category to Custom and makes another text box available, in which you can type a custom format. Use this option to specify which types of characters the user can enter in any given position, and how the data displays in the field.

- **A** Accepts only letters (A–Z, a–z).
- **X** Accepts spaces and most printable characters, including all characters available on a standard keyboard and ANSI characters in the ranges of 32–126 and 128–255.
- **O** The letter "O" accepts alphanumeric characters (A–Z, a–z, and 0–9).
- **9** Accepts only numeric characters (0–9).

For example, a mask setting of AAA--p#999 accepts the input BOE--p#767. A mask setting of OOOOO@XXX accepts the input vad12@3Up.



Example of an Arbitrary Mask entry

Custom

Makes additional options available to form designers who want to write their own JavaScripts for formatting and keystrokes. For example, a custom script could define a new currency format or limit the user entry to specific keystroke characters.

Custom Format Script Displays any custom scripts you have added for formats. The Edit button opens a dialog box in which you can write and add new scripts.

Custom Keystroke Script Displays any custom scripts you have added to validate keystrokes. The Edit button opens a dialog box in which you can write and add new scripts.

To get the *JavaScript for Acrobat API Reference*, go to the JavaScript support page (English only) of the Adobe website.

Validation tab for form field properties

The Validation tab appears only in the Text Field Properties and Combo Box Properties dialog boxes. Validation properties restrict entries to specified ranges, values, or characters, ensuring that users enter the appropriate data for a specified form field.

Field Value Is Not Validated Turns off validation.

Field Value Is In Range Sets a numeric range for form fields using values you enter in either as a number or a percentage.

Run Custom Validation Script Validates by a JavaScript that you create or provide.

See also

"Adding JavaScript to forms" on page 214

Value tab for form field properties

The Value tab appears for barcode form fields only.

Encode Using Activates these options:

- **XML** Encodes the data into the barcode in standard XFDF format. JavaScript script is automatically generated.
- **Tab Delimited** Encodes the fields into the barcode as tab-delimited values. JavaScript script is automatically generated. If the form is configured to output the data in individual XFDF or XDP files, the data must be in a tab-delimited format with the field names in the first line. This option is also useful if you want to fit more data into a barcode or if you intend to copy the data into database or spreadsheet tables.
- **Pick** Opens a dialog box in which you select which user data fields will be encoded in the barcode for you to retrieve.
- **Include Field Names** (Available only when Tab Delimited encoding is selected.) Encodes field names as the first line of the barcode contents. The values are encoded under them.

Custom Calculation Script Displays the default script. Click the Edit button to open the JavaScript Editor dialog box, in which you can write custom calculation scripts for your barcode.

Reference To published Form Shows the path to the PDF form. You can edit this by typing in the URL to the published form. Later, you can re-create a digital version of the completed form by merging the form template with an instance of user-supplied data. You can also maintain the relationship between a specific form template and its related barcode data files. When you encode a barcode using XML values, the URL reference is encoded into the barcode and is displayed on the form, below the barcode.



A type of barcode, with the URL reference below

Manage custom barcode settings

You can save, reuse, and share a set of custom settings for barcode parameters, to apply them when you create new barcode form fields. You can make further adjustments to your custom parameter sets after you define them.

All of these processes begin by opening the barcode form field properties dialog box, which you can do by using the Select Object tool (Tools > Advanced Editing > Select Object Tool) to select a barcode form field, and then choosing Forms > Show Field Properties.

See also

"Create, test, and edit barcode fields" on page 219

"Design tips for barcodes" on page 210

Create a new barcode parameters set

1 In the Barcode Field Properties dialog box, click the Options tab, and then click Manage Barcode Parameters.

2 Select the existing parameter set that you want to use as the basis of the new set, and click New.

3 Type a name in the Name box and a description in the Description box.

4 Select options for Barcode Type, X Dimension, Y/X Ratio, and Error Correction Level, and then click OK.

The newly defined parameter set appears in the list in the Manage Barcode Parameters dialog box, and all the buttons on the right side of the dialog box become available. The new definition also appears in the Decode Condition menu in the Options tab of the Barcode Field Properties dialog box.

Edit or delete a set of custom barcode parameters

1 In the Barcode Field Properties dialog box, click the Options tab, and then click Manage Barcode Parameters.

2 Select a custom parameter set from the list.

3 Choose the appropriate action:

- Click Edit and make the changes to the settings; then click OK.
- Click Delete. Confirm the deletion in the message that appears by clicking OK.

Export or import a set of custom barcode parameters

1 In the Barcode Field Properties dialog box, click the Options tab, and then click Manage Barcode Parameters.

2 Choose the appropriate action:

- Select a barcode parameter set from the list and click Export. Select a location and file name for the file that has the file name extension .bps.
- Click Import, and navigate to and select the BPS file that you want to import.

Redefine form field property defaults

After you change properties for a specific type of form field, you can set those properties as the default set for that type. For example, you can create a check box, change its properties, and then save the properties as the default values. This would not affect the default properties of other types of form fields, such as text boxes or radio buttons.

1 If necessary, do one of the following to go to form-editing mode and to activate the Select Object tool:

- Choose Forms > Edit Form In Acrobat so that a check mark appears next to that command in the Forms menu.
- Choose Tools > Advanced Editing > Select Object Tool.

2 Right-click/Control-click the form field for which you have already changed properties, and choose Use Current Properties As New Defaults.

Note: *Changing the default properties does not change the settings for existing form fields of that type. The new defaults apply only to new fields that you create.*

Setting action buttons in Acrobat

About buttons

Buttons are most commonly associated with forms, but you can add them to any document. Buttons can open a file, play a sound or movie clip, submit data to a web server, and much more. When deciding on how to initiate an action, remember that buttons offer the following capabilities that links and bookmarks do not:

- A button can activate a single action or a series of actions.
- A button can change appearance in response to mouse actions.
- A button can be easily copied across many pages.
- Mouse actions can activate different button actions. For example, Mouse Down (a click), Mouse Up (releasing after a click), Mouse Enter (moving the pointer over the button), and Mouse Exit (moving the pointer away from the button) can all start a different action for the same button.

Buttons are an easy, intuitive way to let users initiate an action in PDF documents. Buttons can have a combination of labels and icons to lead users through a series of actions or events by changing as the mouse is moved. For example, you can create buttons with "Play," "Pause," and "Stop" labels and appropriate icons. Then you can set actions for these buttons to play, pause, and stop a movie clip. You can select any combination of mouse behaviors for a button and specify any combination of actions for a mouse behavior.

Add a button to an Acrobat PDF form

1 In Acrobat, choose Tools > Forms > Button Tool.

2 Drag the cross hair to create the button area.

3 Click the General tab, and then specify a name, tool tip text, and other common properties.

4 Click the Appearance tab, and then specify options to determine how the button will look on the page. Remember, if you select a background color, you won't be able to see through to any images behind the button. The text options affect the label you specify in the Options tab, not the button name in the General tab.

Note: *If Enable Right-To-Left Language Options is selected in the International panel of the Preferences dialog box, the Appearance tab includes options for changing the digit style and text direction for buttons.*

5 Click the Options tab, and select options to determine how labels and icons appear on the button.

6 Click the Actions tab, and then specify options to determine what happens when the button is clicked, such as jumping to a different page or playing a media clip.

7 Click Close.



If you're creating a set of buttons, you may want to snap the object to grid lines or guides.

Add a submit button

Forms that will be returned by a network or Internet connection must have a submit button, which users click to send completed forms back to you.

1 Using the Button tool, create a button and set options in the General and Options tabs.

2 In the Appearance tab, choose an option in the Layout menu for the button label, icon image, or both, and then do one or both of the following:

- Type text in the Label option to identify the button as a submit button.
- Click Choose Icon and either type the path to an image file or click Browse and locate the image file you want to use.

3 In the Actions tab, choose Submit A Form on the Select Action menu, and then click Add.

4 In the Enter A URL For This Link box, do one of the following:

- To collect form data on a server, type the location. For example: **http://www.*[domain]*/*[folder]*/*[subfolder]*/** for an Internet address or ***[server]**[folder]**[subfolder]*** for a location on a local network.
- To collect form data as attachments to email, type **mailto:** followed by the email address. For example, **mailto:nobody@adobe.com**.

5 Select options for Export Format, Field Select, and Date Options, and click OK.

Note: *If the data returns in FDF or XFDF format, the server URL must end with the #FDF suffix—for example, http://myserver/cgi-bin/myscript#FDF.*

Submit Form Selections options

The following options are available in the Submit Forms Selections dialog box:

FDF Returns the user input without sending back the underlying PDF file. You can select options to include Comments and Incremental Changes To The PDF.

Note: *Selecting the option for incremental changes is useful for receiving digital signatures in a way that is easily read and reconstructed by a server.*

HTML Returns the form in hypertext markup language.

XFDF Returns the user input as an XML file. You can include Comments with the field data or just the field data.

PDF Returns the entire PDF file with the user input.

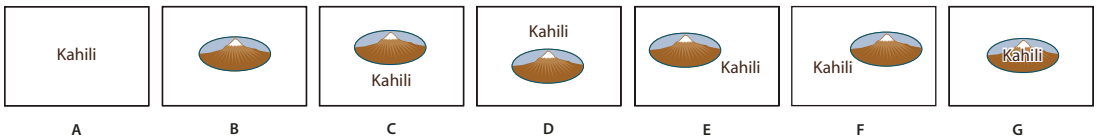
Field Selection Specifies what fields are returned. To receive only some of the completed field data, select Only These, click Select Fields, and select which fields to include or exclude in the Field Selection dialog box.

For example, you might use this to exclude some calculated or duplicate fields that appear in the form for the user's benefit but which do not add new information.

Date Options Standardizes the format for dates that the user enters.

Making buttons change appearance

A button can have a label, an icon, or both. You can change how the button appears in each mouse state (Up, Down, and Rollover). For example, you could create a button that has a "Home" label until the pointer is moved over the button, when it might have a "Click to return to Home page" label.



Button layouts
***A.** Label only **B.** Icon only **C.** Icon top, label bottom **D.** Label top, icon bottom **E.** Icon left, label right **F.** Label left, icon right **G.** Label over icon*

You can make button icons from any file format that Acrobat can display, including PDF, JPEG, GIF, and other image formats. For whichever format you select, the entire page is used, so if you want to use only a portion of a page as an icon, you need to crop the image or page before carrying out this procedure. The smallest allowable PDF page size is 1-by-1 inch (2.54-by-2.54 cm). If you want the icon to appear smaller than 1-by-1 inch, scale it to fit the size of the box drawn with the button tool. Clicking Advanced in the Options tab of the Button Properties dialog box lets you determine how a button icon is scaled to fit inside a button.

Edit a button in Acrobat

❖ Select the Button tool OK, and then do any of the following:

- To edit the button's properties, double-click the button.
- To change the button's appearance, click the button, and then specify options using the Properties toolbar. You can also change these appearance options in the Appearance tab of the Properties dialog box.
- To align, center, or distribute the button with other form fields, or to resize or duplicate the button, right-click (Windows) or Control-click (Mac OS) the button, and then choose an option from the context menu.

See also

"Scale and position buttons in Acrobat" on page 235

Specify Acrobat button display properties

1 Select the Button tool OK or the Select Object tool.

2 Double-click an existing button, and then click the Options tab in the Button Properties dialog box.

3 For Layout, choose the type of label display you want. (For information on scaling button icons, see the next procedure.)

4 For Behavior, specify the display of the button when clicked.

5 To define the label or icon that appears on the button, do the following:

- If a label option is selected from the Layout menu, type the text in the Label box.
- If an icon option is selected from the Layout menu, click Choose Icon, and then click Browse. Select the file type from the Objects of Type (Windows) or Show (Mac OS) menu, double-click the file name, and then click OK. (Click Clear to remove the selected icon.)

6 Click Close to accept these display properties.

Button Behavior options

None Keeps the appearance of the button the same.

Push Specifies appearances for the Up, Down, and Rollover states of the mouse. Select an option under State, and then specify a label or icon option:

Up Determines what the button looks like when the mouse button isn't clicked.

Down Determines what the button looks like when the mouse is clicked on the button, but before it's released.

Rollover Determines what the button looks like when the pointer is held over the button.

Outline Highlights the button border.

Invert Reverses the dark and light shades of the button.

Scale and position buttons in Acrobat

1 Select the Button tool  or the Select Object tool .

2 Double-click an existing button to open the Button Properties dialog box.

3 Click the Options tab, select one of the icon options from the Layout menu, and then click Advanced.

Note: *The Advanced button isn't available if you choose Label Only from the Layout menu.*

4 Select an option from the When To Scale menu:

Always Scales the icon as defined regardless of its size in relation to the button size.

Never Preserves the icon's original size; the button border crops the icon if it doesn't fit. If Never is selected, scale options aren't available.

Icon Is Too Big Scales the icon as defined only if it is larger than the button.

Icon Is Too Small Scales the icon as defined only if it is smaller than the button.

5 From the Scale menu, select whether or not to scale the icon proportionally. If the icon is scaled nonproportionally, it may be skewed.

6 To make sure that either the top and bottom or left and right sides of the icon are flush against the button edges, select Fit To Bounds.

7 To define where the icon is placed inside the button, drag the slider arrows. Icon placement is defined according to the percentage of space preserved between the icon and the left field boundary, and between the icon and the bottom field boundary. The default setting (50, 50) places the icon in the middle of a field. You can click Reset at any time to revert to the default placement setting.

8 Click OK, and then click Close.

Hide an Acrobat button except during rollover

In some cases, you may want the button area to be invisible until the pointer moves over it. By alternately showing and hiding a button, you can create interesting visual effects in a document. For example, when you move a pointer over a city on a map, a detail map of the city could be displayed, and the detail map could disappear when the pointer moves away from the city.



Showing and hiding icons
***A.** Pointer not over button area **B.** Pointer enters button area **C.** Pointer exits button area*

1 Using the Button tool, drag across the area where you want the pop-up button to appear. For example, if the PDF file contains a map of France, drag across the area where you want a detailed map of Paris to pop up.

2 Double-click the button.

3 Click the Options tab, and choose Icon Only from the Layout menu.

4 Choose Push from the Behavior menu, and then choose Rollover from the State list.

5 Click Choose Icon, and then click Browse. Select the file type from the File Of Type (Windows) or Show (Mac OS) menu, navigate to the location of the image file, and then double-click the file. In this example, you would select a map of Paris. Click OK to accept the previewed image as the button.

6 Click the Appearance tab. If needed, deselect Border Color and Fill Color, and then click Close.

7 Select the Hand tool, and move the pointer across the button. The image field you defined appears as the pointer rolls over the button area and disappears when it exits.

If you want the image to be larger than the rollover area, or if you want the image to be in a different location than the image button that pops up, use the Show/Hide A Field action. First, you specify an icon for the button that will be shown and hidden. Next, you create a second button that acts as a hot spot when the mouse rolls over it. You do not assign an icon for the appearance of the second button. Instead, you use the Actions tab to show the first button when the pointer enters the second button, and hide the first button when the pointer exits.

Distributing forms

Distribute a form by email

If you want to distribute the form immediately and through your default email application, you can complete the distribution process entirely in the Distribute Form wizard. However, if you want to distribute the form later, or if you want to distribute it through a web-based email account, the process is slightly different.

Distribute the form now

1 Do one of the following:

- Choose Forms > Distribute Form.
- In the Forms toolbar, click the Distribute button.
- Choose Tools > Forms > Distribute.
- On the Tasks toolbar, choose Distribute Form on the Forms button menu.

***Note:** In order to distribute a form, it must contain a submit button. Otherwise, the Distribute commands and Distribute button may not be available.*

2 A series of messages might appear, depending on the conditions Acrobat detects in your form. Respond to the on-screen instructions as needed, to finalize fields, add a submit button, clear any sample data, and save the form.

3 In the form Distribution Options dialog box, select Send Now Via Email.

4 Follow the instructions that appear in the Distribute Form wizard providing all the following information, and clicking Next after each addition:

- The email address to which the form data will return.
- A location for the data collection file.
- Email addresses for all the individuals to whom the form will be sent.
- Text for the email subject line and message body text, if you want something other than the default text. Or, you can click Select Text File and browse to select a text file that you have created with content for the message body text.

5 Click Done, and then open the Outbox in your default email application and review the prepared message.

Notice that the recipient addresses are automatically listed in the Bcc box, so that the identities of the addressees are hidden from all recipients.

Prepare the form for later distribution

1 Do one of the following:

- Choose Forms > Distribute Form.
- In the Forms toolbar, click the Distribute button .
- In the Tasks toolbar, choose Distribute Form on the Forms button  menu.

Note: *In order to distribute a form, it must contain a submit button. Otherwise, the Distribute commands and Distribute button may not be available.*

2 A series of messages might appear, depending on the conditions Acrobat detects in your form. Respond to the on-screen instructions as needed, to finalize fields, add a submit button, clear any sample data, and save the form.

3 In the form Distribution Options dialog box, select Save And Send Later.

4 Follow the instructions that appear in the Distribute Form wizard.

The wizard saves two versions of the PDF form. The default name given to one is [*original file name*]_dataset_0001.pdf, which is where returned data will be collected. The other PDF is the one that is attached to email for distribution. Its default name is [*original file name*]_pub_0001.pdf.

5 When you are ready to distribute the form, open the email application or web-based email site, create a new message, address it to the people you want to fill in the form, and add Subject line and message text.



When you send out a form to more than one person, it's usually a good idea to place all addresses on the Bcc address line so that the identities of the recipients are hidden from all viewers.

6 Add the [*original file name*]_pub_0001.pdf as an attachment to the outgoing email message, and click Send.

Send secure forms

Sending a secure form certifies the form-originator's identity to form recipients and encrypts the data that the recipients submit when returning a filled-in form.

1 Open the form, and do one of the following:

- If the form is open in Acrobat, choose Forms > Distribute Forms.
- If the form is open in LiveCycle Designer, choose File > Distribute Forms.

2 In the Form Distribution Options dialog box, specify whether you want to send the form now or save it to send later.

3 In the Distribute Form wizard, enter the email address to which completed forms will be sent, and select Secure Forms On Return.

4 Continue through the Distribute Form wizard, following the on-screen instructions.

Requirements

- The form must be an Adobe XFA form, which is the format applied by LiveCycle Designer. If you edited the form in Acrobat, you must save it in LiveCycle Designer (available only for Windows) before you can use the send-secure feature.
- The form must contain a submit button that is configured with an email return address, such as mailto:nobody@adobe.com.
- The form originator must have a digital ID. See "Creating or obtaining digital IDs" on page 253.

Publishing interactive web forms

About web forms

PDF forms can be useful for submitting and collecting information over the web. This is done by providing several button actions that perform functions similar to some HTML scripting macros. You must have a Common Gateway Interface (CGI) application on the web server to collect and route the data to a database. Any existing CGI application that collects data from forms (in HTML, FDF, or XML format) can be used.

Before you make your forms web-ready, make sure that your form-field names match those set in the CGI application.

Important: *CGI scripts must be built outside Acrobat, and their creation is not covered by the Adobe Acrobat product.*

Add submit functionality

Use the Submit A Form action to send form data to an email address or to a web server by specifying a URL. You can also use the submit button to send other files back to a server or database. For example, you can attach scanned images or files to a form. The files are submitted along with the rest of the form data when you click the submit button.



If your PDF form contains an email-based submit button, you can use the Distribute Form workflow to facilitate distributing the form to others.

1 In the Acrobat Forms toolbar, select the Button tool, and create a button.

2 Double-click the button to open the Button Properties dialog box.

3 Click the Actions tab, and select Mouse Up from the Select Trigger menu.

4 Select Submit a Form from the Select Action menu, and then click Add.

5 In the Submit Form Selections dialog box, type an entry in Enter A URL For This Link:

- To send the form data to a web server, enter the destination URL.
- To send the form data to an email address, enter **mailto:** followed by the email address. For example, type **mailto:nobody@adobe.com**.

6 Make additional changes to the available options, and then click OK to close the dialog box.

7 Change settings on other tabs in the Button Properties dialog box as needed, and then click Close.

Submit Form Selections options

FDF Exports as an FDF file. You can select one or more of the available options: user-entered data, comments, and incremental changes to the PDF file. The Incremental Changes To The PDF option is useful for exporting a digital signature in a way a server can easily read and reconstruct.

Note: *If the server returns data to the user in FDF or XFDF format, the server's URL must end with the #FDF suffix—for example, http://myserver/cgi-bin/myscript#FDF.*

HTML Exports as an HTML file.

XFDF Exports as an XML file. You can choose to export the form fields data, comments, or both.

PDF The Complete Document Exports the entire PDF file that is your form. Although this creates a larger file than the FDF option, it is useful for preserving digital signatures.

Note: *If the users that fill in the PDF form are using Adobe Reader, you must choose either FDF or XFDF for the Export Format option.*

All Fields Exports all form fields even if the form fields do not contain values.

Only These Exports only the form fields you specify by clicking Select Fields and indicating which form fields to include and whether you want to include empty fields.

Convert Date To Standard Format Exports all form dates in a single format, regardless of how they are entered in the form.

Add a Reset Form button (in Acrobat)

A Reset Form button clears any data a user has already entered in the form. It is similar to the Forms > Clear Form feature, which is available to you when you create and edit Acrobat forms. However, you can set up your reset button so that it clears only specific fields.

1 In the Forms toolbar, select the Button tool, and create a button.

2 Double-click the button to open the Button Properties dialog box.

3 Click the Actions tab, and select Mouse Up from the Select Trigger menu.

4 Select Reset A Form from the Select Action menu, and then click Add.

5 In the Reset A Form dialog box, either click individual check boxes to select or deselect the fields that you want to be reset by the button or select Select All. Then click OK.

The list in the Actions tab now shows Reset A Form nested under the Mouse Up action.

As needed, you can open other tabs in the Button Properties dialog box and apply other types of properties to the button.

See also

"Form fields behaviors" on page 222

Add an Import Data button (in Acrobat)

You can use the Import Form Data action to enable users to fill out common form fields, such as name and email address, with data imported from another form. Users can also use the Import Data button to populate common form fields with their personal profile information. Only form fields that match are updated. Those that do not match are ignored. Before you create an Import Form Data action, you must have set up a form with common information form fields from which the data will be exported.

Note: *The Import Form Data action searches for the data file from which to import data in different locations in Windows than on Mac OS. In Windows, the Import Form Data action searches the Acrobat or Acrobat Reader folder, the current folder, the System folder, the Windows folder, My Documents\Adobe\Acrobat, and the folders that are in the PATH statement. On Mac OS, the Import Form Data action searches the Acrobat or Acrobat Reader folder and the System Preferences folder.*

1 In the Forms toolbar, select the Button tool, and create a button.

2 Double-click the button to open the Button Properties dialog box.

3 Click the Actions tab, and select Mouse Up from the Select Trigger menu.

4 Select Import Form Data from the Select Action menu, and then click Add.

5 Locate and select an FDF file, and click Select.

6 Click OK to accept the selections.

7 Click another tab in the Button Properties dialog box to continue defining properties for the button, or click Close.

See also

"Import form data" on page 204

"Add a button to an Acrobat PDF form" on page 232

CGI export values

An export value is the information sent to a CGI application to identify a user-selected form field. You need to define an export value only if both of the following are true:

- The data is collected electronically in a database over a company intranet or the web.
- The data is different from the item designated by the form field, or the form field is a radio button.

When defining export values, keep the following guidelines in mind:

- Use the default export value (Yes) to indicate that a check box or radio button has been selected.
- Enter an export value for combo boxes or list boxes only if you want the value to be different from the item listed—for example, to match the name of the form field in a database. The item selected in the combo box or list box is used as the export value unless a different export value is explicitly entered in the Properties dialog box.
- Related radio buttons must have exactly the same form field name but different export values. This ensures that the radio buttons toggle and that the correct values will be collected in the database.

Collecting and managing form data

About data set files

Data set files are PDF packages that contain individual records submitted for a specific form that you have distributed. You create the data set file during the distribution process, as one of the steps in the Distribute Form wizard.

You can also create a data set file after the distribution process and then add individual records to that file.

For more information, choose Help > Complete Adobe Acrobat 8 Professional Help, and search for "About PDF packages" and "Distributing forms."

Add completed form data to a data set file

1 In your email application, open an email message with a completed form attached to it.

2 Double-click the returned form icon in the email.

3 In the Add Completed Form To Data Set dialog box, select one of the following:

Add To An Existing Data Set Compiles the data in the data set you created when you used the Distribute Form wizard to send out the form. (If necessary, click Browse and locate that data set file.)

Create A New Data Set Creates a new data set, using the name and location you specify by typing and clicking the Browse button.

The data set opens after you click OK. Each returned form added to the data set appears as a component file of a PDF package.

Compile form data

1 In Acrobat, choose Forms > Compile Returned Forms.

2 In the Compile Data dialog box, do one of the following to select a PDF data set file:

- Click Browse, and then locate and select the data set file.
- Choose a data set file from the menu.
- Type the path to the data set file.

3 Click Add File, and navigate to the returned form.

4 Repeat the previous step as many times as necessary to add more returned forms.

After you click OK, the data from the selected forms is added to the data set. Each returned form appears as a component file of a PDF package.

Add records to an existing data set

1 In Acrobat, open the data set PDF file.

2 In the data set navigation bar (between the toolbar area and the document pane), click Import Data.

3 In the Add Returned Forms dialog box, click Add File. Then locate and select the returned form data files, and click Open.

4 Repeat the previous step to add any returned forms in other folders. When finished, click OK.

When you finish, each added data file appears as a component file of the data set PDF package.

Export records from a PDF data set

Use this process to save all the entries in a data set PDF package to a spreadsheet or XML file.

1 In Acrobat, open the data set PDF file.

2 In the data set navigation bar (between the toolbar area and the document pane), click Export Data.

3 In the Select Folder To Save File dialog box, specify a name, location, and file format (CSV or XML) for the form data, and click Save.

Manage form data files

You can move the answers on a PDF form to and from other file formats that preserve all the data in much less space than a full PDF.

Import form data

In some workflow scenarios, individuals submit filled-in forms as data-only files rather than as complete PDF files. These files are not PDFs, but use another file format, such as FDF or XML. You can view the data submitted by an individual recipient in the context of the PDF by opening the original file and importing the information in the data file.

1 In Acrobat, open the PDF form into which you want to import data.

2 Choose Forms > Clear Form.

Note: *When you import data from another file into a PDF form, the imported data replaces any information that appeared previously in the individual form fields. However, if the imported data file contains one or more blank form fields, importing will not clear the original data.*

3 Choose Forms > Manage Form Data > Import Data.

4 In the Select File Containing Form Data dialog box, select a format in File Of Type (FDF, XFDF, XML, XDP, XFT, TXT, or All Files) corresponding to the data file you want to import. Then locate and select that file, and click Select.

Note: *Some formats are available only for specific types of PDF forms, depending on the application used to create the form, such as Acrobat or LiveCycle Designer. Data you import from a text file (.txt) must be formatted in tab-delimited rows that form columns.*

Export file data

You can save the information in a completed PDF form as a data file in another file format. Later, you can reuse the data to fill in the form again or another form with the same fields and field names.

1 In Acrobat, open the completed form file.

2 Choose Forms > Manage Form Data > Export Data.

3 In the Export Form Data As dialog box, select the format in which you want to save the form data (FDF, XFDF, XML, or TXT). Then select a location and filename, and click Save.

Note: *Some file formats are available only for specific types of PDF forms, depending on how the form was created.*

Merge exported data files to a spreadsheet

If you want to compile data from forms that are not already in a data set, use the following process.

1 Choose Forms > Manage Form Data > Merge Data Files Into Spreadsheet.

2 In the Export Data From Multiple Forms dialog box, click Add Files.

3 In the Select file Containing Form Data dialog box, select a file format option in File Of Type option (Acrobat Form Data Files or All Files). Then locate the form files that you want to merge into the spreadsheet, select them, and click Select.

4 Repeat the previous step to add form data files that are in other locations, as needed.

5 Click Export. Then select a folder and filename for the spreadsheet, and click Save.

6 In the Export Progress dialog box, click either View File Now to open the spreadsheet file or Close Dialog to return to Acrobat.

Note: *When returned forms are in a data set, the most efficient way to export the information into a spreadsheet is to use the Export Data button in the navigation bar for the data set PDF package.*

About Forms Tracker

The Forms Tracker is a panel of the same window in which you track PDF reviews and subscriptions.

There are several ways to open the Forms Tracker:

- Choose Forms > Track Forms.
- In the Tasks toolbar, choose Track Forms from the Forms button pop-up menu.
- In the Review Tracker window (opened by choosing Comments > Review Tracker), click the Forms Tracker button  on the left side of the window.

Four buttons appear on the left side of the Forms Tracker. Each one opens a different panel when clicked: To Do, History, Search Results, and Forms Library. These panels can remind you of the status of various forms that are part of your workflow and make it easy to find and reopen those forms.

You add a form to the Forms Library panel during the forms-distribution process. At the end of the Distribute Form wizard, a message appears, stating that the form has been sent to your default email application. This message also includes an Add To My Form Library option.

Search for forms

It is not necessary to have any PDF open when you search for forms.

1 Choose Forms > Track Forms.

2 In the Search text box at the top of the Forms Tracker, type all or part of the filename for the forms you want to find, and then click Search.

The Search Results panel opens automatically, showing a list of forms that match your search text.

Chapter 8: Security

Document security is similar to home security. Just as you lock your doors to prevent someone from entering your house without permission, you use security features to lock an Adobe PDF. For example, you can use passwords to restrict users from opening, printing, and editing PDFs. You can use a certificate to encrypt PDFs so that only an approved list of users can open them. If you want to save security settings for later use, you can create a security policy that stores security settings.

Note: *To apply security features to PDFs, you need Adobe Acrobat 8 Professional, Acrobat 8 Standard, or Acrobat 3D Version 8.*

Quickstart

The following topics provide an overview of some common security tasks.

Check security restrictions

When you receive a PDF, it may contain restrictions preventing actions such as printing or copying information.

1 Click Security Settings or Signatures to the left of the document window. (The Security Settings button only appears when the PDF contains security restrictions.)

2 View restriction information. In the Security Settings panel, you can click Permission Details to get more information.

If you cannot open a PDF or are restricted from using certain features, contact the PDF author.

See also

"Open secured PDFs" on page 247

Examine a PDF for hidden content

Before making a PDF available to others, you may wish to remove content that reveals the document history or that contains your personal information, such as metadata that lists your name as the author.

1 Choose Document > Examine Document.

2 Select the items you want removed from the PDF, and click Remove All Checked Items.

3 Save the document with a new name.

You can also examine a PDF at the end of a redaction process.

See also

"Examine a PDF for hidden content" on page 248

Redact sensitive content

Use redaction to remove sensitive content from a PDF.

Important: *Save a copy of the PDF before applying redaction markups.*

1 Choose View > Toolbars > Redaction.

2 Click Mark For Redaction , and do any of the following:

- Double-click a word or an image.
- Drag across text.
- Ctrl-drag/Control-drag over an area of the page.

3 Click Apply Redactions . Search for and remove hidden content, if desired.

Use Search And Redact to remove all instances of a search string.

See also

"Redact sensitive content" on page 249

Register a digital ID

You must register a digital ID in Acrobat before you can use it.

1 Choose Advanced > Security Settings.

2 Select Digital IDs, and click Add ID.

3 Select Browse For An Existing Digital ID File.

4 Follow the on-screen instructions to select the digital ID file, type your password, and register the digital ID.

You can create self-signed digital IDs in Acrobat. Or, see the Adobe website for information on acquiring a digital ID from Adobe security partners.

See also

"Register a digital ID" on page 254

Create a self-signed digital ID

A digital ID is required to sign documents and apply certificate security. Self-signed digital IDs created from Acrobat may be adequate for many situations. See the Adobe website for information on acquiring a digital ID from Adobe security partners.

1 Choose Advanced > Security Settings.

2 Select Digital IDs, and click Add ID.

3 Select Create A Self-Signed Digital ID For Use With Acrobat.

4 Follow the on-screen instructions to set up the self-signed digital ID.

See also

"Create a self-signed digital ID" on page 254

Share your certificate

Your digital ID includes a certificate that others require to validate your signature and encrypt documents for you.

1 Choose Advanced > Security Settings.

2 Select Digital IDs on the left.

3 Select the ID you want to share, and click Export .

4 Follow the on-screen instructions to email the certificate or save it to a file.

If you use a third-party security method, you usually don't need to share your certificate with others.

See also

"Sharing certificates with others" on page 258

Add a document password

One way to restrict access to a PDF is to add a Document Open password.

Important: *There is no way to open the PDF if you forget the password.*

1 Click Secure on the Tasks toolbar, and choose Password Encrypt.

2 Select Require A Password To Open The Document, and type a case-sensitive password in the text box.

If the PDF already has security applied, you may need to supply the Permissions password that lets you change security settings.

See also

"Set passwords for PDFs" on page 264

Prevent changes to a PDF

Add security restrictions to help prevent others from changing your PDF.

1 Click Secure on the Tasks toolbar, and choose Password Encryption.

2 Select Restrict Editing And Printing Of The Document, and type a Permissions password.

3 Choose an option from the Changes Allowed menu.

For information on using other security methods to restrict access, see Help.

See also

"Set passwords for PDFs" on page 264

Create secure attachments

You can add security to both PDF and non-PDF documents by embedding them in an encrypted envelope, called a *security envelope*, that you can send as an email attachment.

1 Click Secure on the Tasks toolbar, and choose Create Security Envelope.

2 Click Add File To Send, and select the desired documents.

3 Click Next, and follow the on-screen instructions to create the security envelope.

Recipients can extract and save the encrypted documents. Once saved, the documents are no longer encrypted.

See also

"Create secure attachments" on page 268

Opening restricted documents

Open secured PDFs

If you receive a PDF that is protected by security features, you may need a password to open the document. Some protected documents have restrictions that prevent you from printing, editing, or copying content in the document. If a document has restricted features, any tools and menu items related to those features are dimmed.

❖ If a document is restricted or has a special status, the Security Settings button or the Signatures button appear to the left of the document window. Click the button to discover the protection settings and determine which features are restricted.

If you have trouble opening a PDF, or if you're restricted from using certain features, contact the author of the PDF.

Restrict URLs and attachments in PDFs

Acrobat warns you any time you try to open a URL (web link) or a file attachment that uses a disallowed file type. URLs and disallowed file types (for example, EXE) are potentially dangerous because they can transfer or run programs, macros, or viruses that can damage your computer.

You can allow Acrobat to contact specific websites by adding those URLs to your list of allowed websites in the Trust Manager preferences. Remove any URLs you no longer want to visit. To open file attachments in Acrobat, you must respond to a prompt by indicating that you always allow files of that type. The attachment's file type is then added to a list stored in the registry. If you want to restrict a file type that you permitted in the past, you can reset this list to its default settings in the Trust Manager preferences.

Trust Manager preferences

To open the Trust Manager preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Trust Manager on the left.

Allow Opening Of Non-PDF File Attachments With External Applications When selected, allows file attachments to start external applications when you open the files. You must have the external applications to open the files.

Restore Default List Of Allowed And Disallowed File Attachment Types Removes saved settings you chose for opening attachments. For example, if you chose to always open TMP attachments when prompted, TMP appears on the list of allowed file attachment types. By clicking Restore, you remove TMP from the list.

Change Settings When clicked, lets you specify the default behavior for accessing the Internet from PDFs. To restrict access to only the URLs you specify, select Let Me Specify A List Of Allowed And Blocked Web Sites (the default). To allow access to all URLs, select Allow All Web Sites. To restrict access with all URLs in PDFs, select Block All Web Sites.

To specify a list of allowed and blocked websites, type each URL in the text box, and click Allow or Block. Then specify the default behavior for Acrobat for websites that aren't in the list.

Note: *If you open a protected PDF and a security warning dialog box prompts you to allow or block a URL, select Remember My Action For This Site, and the URL is added to this list.*

Allow External Content Allows Acrobat to read data from stream objects in a PDF. Stream objects are URLs or file specifications identified by flags, as specified in *PDF Reference Version Fifth Edition: Adobe Portable Document Format Version 1.6*. Use this option if you're a PDF developer who creates PDF files that contain streams, or if you work with these types of files.

Removing sensitive content

Preparing PDFs for distribution

Before you distribute a PDF, you may want to examine the document for sensitive content or private information that can trace the document to you. Such information may be hidden or not immediately apparent. For example, if you created the PDF, the document metadata likely lists your name as the author.

You may also want to remove content that can inadvertently change and modify the document's appearance. JavaScripts, actions, and form fields are types of content that are subject to change. If your document doesn't require these items, remove them before you distribute the document. You can use the Examine Document command to find and remove hidden content from a PDF.

To remove sensitive images and text that are visible in a PDF, use the Redaction tools.

Examine a PDF for hidden content

Use the Examine Document feature to find and remove content from a document that you don't want, such as hidden text, metadata, comments, and attachments.

If you want to examine every PDF for hidden content before you close it or send it in email, specify that option in the Documents preferences (choose Edit > Preferences [Windows] or Acrobat > Preferences [Mac OS], and select Documents on the left).

1 Choose Document > Examine Document.

If items are found, they are listed in the Examine Document dialog box with a selected check box beside each item.

2 Make sure that the check boxes are selected only for the items that you want to remove from the document:

Metadata Metadata includes information about the document and its contents, such as the author's name, keywords, and copyright information, that can be used by search utilities. To view metadata, choose File > Properties.

File Attachments Files of any format can be attached to the PDF as an attachment. To view attachments, choose View > Navigation Panel > Attachments.

Annotations And Comments This item includes all comments that were added to the PDF using the comment and markup tools, including files attached as comments. To view comments, choose View > Navigation Panel > Comments.

Form Field Logic Or Actions This item includes form fields (including signature fields), and all actions and calculations associated with form fields. If you remove this item, all form fields are flattened and can no longer be filled out, edited, or signed.

Hidden Text This item indicates text in the PDF that is either transparent, covered up by other content, or the same color as the background. To view hidden text, click Preview. Click the double-arrow buttons to navigate pages that contain hidden text, and select options to show hidden text, visible text, or both.

Hidden Layers PDFs can contain multiple layers that can be shown or hidden. Removing hidden layers removes these layers from the PDF and flattens remaining layers into a single layer. To view layers, choose View > Navigation Panel > Layers.

Bookmarks Bookmarks are links with representational text that open specific pages in the PDF. To view bookmarks, choose View > Navigation Panel > Bookmarks.

Embedded Search Index An embedded search index speeds up searches in the file. To determine if the PDF contains a search index, choose Advanced > Document Processing > Manage Embedded Index. Removing indexes decreases file size but increases search time for the PDF.

Deleted Hidden Page And Image Content PDFs sometimes retain content that has been removed and which is no longer visible, such as cropped or deleted pages, or deleted images.

Note: *The Examine Document feature doesn't find or remove links. If you want to remove links, use PDF Optimizer.* *See "PDF Optimizer" on page 343*

3 Click Remove All Checked Items to delete selected items from the file, and click OK.

Note: *When you remove checked items, additional items are automatically removed from the document: digital signatures; document information added by third-party plug-ins and applications; and special features that enable Adobe Reader users to review, sign, and fill in PDF documents.*

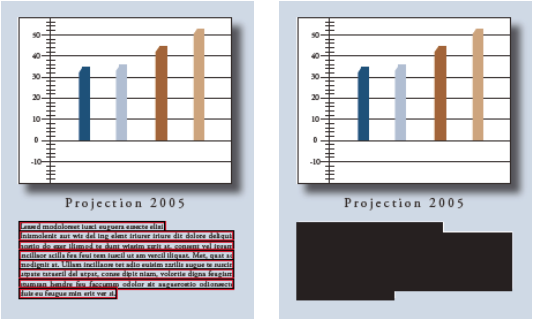
4 Choose File > Save, and specify a filename and location. If you don't want to overwrite the original file, save the file to a different name, location, or both.

The selected content is permanently removed when you save the file. If you close the file without saving it, you must repeat this process, making sure to save the file.

Redact sensitive content

The Redaction tools let you permanently remove (redact) visible text and images from PDFs. In place of the removed items, you can have redaction marks that appear as colored boxes, or you can leave the area blank. You can specify custom text or redaction codes to appear over the redaction marks.

Note: *If you want to locate and remove specific words or phrases, use the Search And Redact tool*  *instead.*



Text marked for redaction (left), and redacted (right)

1 Choose View > Toolbars > Redaction.

2 (Optional) To set the appearance of redaction marks, click Redaction Properties.

3 Select the Mark For Redaction tool .

4 Mark items you want to remove by doing any of the following:

- Double-click to select a word or image.
- Press Ctrl/Control as you drag to select a line, a block of text, an object, or an area. Use this method to select areas of a page in a scanned document.

To preview how your redaction marks will look, hold the pointer over the marked area.

5 To redact the marked items, click Apply Redactions in the Redaction toolbar.

6 Click OK to remove the items. The items aren't permanently removed from the document until you save it.

7 If you want to search for and remove hidden information in the document by using the Examine Document feature, click Yes. Otherwise, click No.

8 Choose File > Save, and specify a filename and location. If you don't want to overwrite the original file, save the file to a different name, location, or both.

Search and redact words

Use the Search And Redact tool to find and remove words or phrases in one or more PDFs that contain searchable text.

Note: *The Search And Redact tool doesn't search secured (encrypted) PDFs.*

1 Choose View > Toolbars > Redaction, and select the Search And Redact tool .

2 In the text box, type the word or phrase you want to remove.

3 Specify if you want to search the current PDF or PDFs in another location.

4 Select Whole Words Only and Case-Sensitive if you want to apply these conditions to the search.

5 Click Search And Redact.

6 In the search results, click the plus sign (+) next to the document name to see all occurrences of the word or phrase. Then, select the occurrences you want to mark for redaction:

- To select all occurrences in the list, click Check All.
- To select individual occurrences, click the check box for each one you want to redact. Click the text next to a check box to view the occurrence on the page.

- To mark none of the occurrences, close the Search window or click New Search to start over.

7 If you selected occurrences that you want to mark for redaction, click Mark Checked Results For Redaction.

The Search window closes, and the items you checked in the list are shown marked for redaction.

Note: *If you haven't saved the file, you can select redaction marks in the document and press Delete to remove the redaction mark. The redaction marks become permanent after you save the file.*

8 To remove the marked items, click Apply Redactions in the Redaction toolbar, and then click OK.

The items aren't permanently removed from the document until you save it.

9 If you want to search for and remove hidden information in the document by using the Examine Document feature, click Yes. Otherwise, click No.

10 Choose File > Save, and specify a filename and location. If you don't want to overwrite the original file, save the file to a different name, location, or both.

See also

"Searching PDFs" on page 369

Change the look of redaction markers

By default, black boxes appear in place of redacted images and text. You can set the default appearance of redaction marks before you mark items for redaction, or you can change the look of redaction marks before you apply the redactions.

Set the default look of all marks

1 In the Redaction toolbar, click Redaction Properties.

2 On the Appearance tab, select options you want to change, and then click OK:

- Click the Redacted Area Fill Color icon and select a fill color from the Color palette for the boxes that replace removed items. Choose No Color to leave the redacted area blank.
- Select Use Overlay Text if you want to select the custom text or redaction code options. Select the font, size, and text alignment.
- Select Custom Text, and type the text you want to appear in the redacted area.
- Select Redaction Code and then either select a code within an existing set, or click Edit to define a new code set or a new code.

Change the look of a mark

1 After you apply redactions, right-click/Control-click a redaction mark, and choose Properties.

2 Select the options you want, and then click OK.

Properties for redaction text

Custom Text Displays text you type into the Custom Text option over the redaction mark.

Font Displays custom text in the selected font.

Font Size Displays custom text in the selected point size.

Auto-Size Text To Fit Redaction Region Resizes custom text to fit within the redacted area. When selected, this option overrides the Font Size setting for the overlay text.

Font Color Displays custom text in the selected color, which you can change by clicking the color swatch.

Repeat Overlay Text Fills the redacted area with as many instances of the custom text as needed, without changing the font size. For example, if you specify the letter *x* or a hyphen (-) as the custom text, these characters are repeated throughout the redacted area.

Text Alignment Sets the text alignment.

Create and edit redaction codes

Both the Redaction Code and Custom Text options create text that overprints areas that contain redaction markers. The difference is that redaction codes are text entries that you can save, export, and import. One code set can contain multiple codes.

Note: *Codes don't save the current attributes for overlay text as part of the code definition, such as colors, font characteristics, and repetition or size of text. Codes only make the overlay text itself reusable in future sessions and by other users with whom you share code sets. You set other attributes for the code in the Redaction Tool Properties dialog box.*

Create redaction codes and code sets

1 Click Redaction Properties in the Redaction toolbar.

2 Select Use Overlay Text.

3 Select Redaction Code, and then click Edit Codes.

4 In the Redaction Code Editor dialog box, click Add Set.

5 (Optional) Type a new name for the set in the text box below the list of code sets, and then click Rename Set.

6 Click Add Code, and type the text that you want to appear as overlay text in the text box below the list of code entries, and then click Rename Code.

7 Repeat the previous step to add another code entry to that code set, or repeat the previous three steps to create additional code sets and codes.

Edit redaction codes and code sets

1 Click Redaction Properties in the Redaction toolbar.

2 Select Use Overlay Text, and then select Redaction Code.

3 Select a code set from the list on the left, and click Edit Codes.

4 In the Redaction Code Editor dialog box, do any of the following:

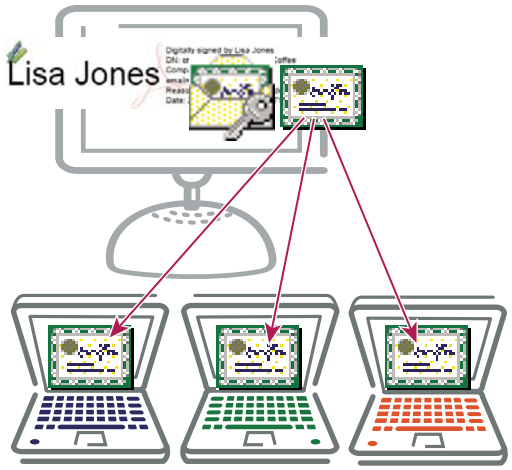
- To remove a code set and all of the code entries within it, select the code set and click Remove Set.
- To export a code set to a separate XML file that you can reuse in other PDFs or share with others, select the code set and click Export Set, specify a filename and location, and click Save.
- To import a previously saved code set, click Import Set, locate and select that file, and click Open.
- To rename a code set, type a new name in the box below the list and click Rename Set.

5 With the code set selected, select the code entry that you want to edit, and do one of the following:

- To remove a code entry, click Remove Code.
- To rename a code entry, type a new name in the box below the list and click Rename Code.

Creating or obtaining digital IDs

About digital IDs



Digital IDs include a private key that you safeguard and a public key (certificate) that you share.

A *digital ID* is like a driver's license or passport. It proves your identity to people and institutions that you communicate with electronically. A digital ID usually contains your name and email address, the name of the company that issued your digital ID, a serial number, and an expiration date.

Digital IDs operate by using a key pair: the public key locks, or encrypts, data; the private key unlocks, or decrypts, that data. When you sign PDF documents, you use the private key to apply your digital signature. You distribute the *certificate* that contains your public key and other identifying information to those who need to validate your signature, verify your identity, or encrypt information for you. Only your private key can unlock information that was encrypted using your certificate, so be sure to store your digital ID in a safe place.

You must have a digital ID to sign, certify, and apply certificate encryption to PDFs. You can get a digital ID from a third-party provider, or you can create a self-signed digital ID. Self-signed digital IDs may be adequate for many situations. However, to prove your identity in most business transactions, you may need a digital ID from a trusted third-party provider, called a *certificate authority*. Because the certificate authority is responsible for verifying your identity to others, choose one that is trusted by major companies doing business on the Internet. See the Adobe website for information about Adobe security partners that offer digital IDs and other security solutions.

You can have multiple digital IDs that you use for different purposes, particularly if you sign documents in different roles or using different certification methods. Digital IDs are usually password protected and can be stored on your computer in PKCS #12 file format, on a smart card or hardware token, in the Windows certificate store, or on a signing server (for roaming IDs). Acrobat includes a default signature handler that can access digital IDs from any of these following locations. (You must register the digital ID in Acrobat for it to be available for use.)

See also

"Sharing certificates with others" on page 258

"Smart cards and hardware tokens" on page 255

Register a digital ID

You must register your digital ID in Acrobat before you can use it. If you obtained or created a digital ID file that doesn't appear in your list of digital IDs, you can search for the missing digital ID file and add it to the list. You can identify digital ID files by their file extensions. For PKCS #12 files, the extension is .pfx in Windows and .p12 in Mac OS. Digital ID files from some earlier versions of Acrobat have an .apf extension. If you select an .apf digital ID file, you may be prompted to convert it to a supported file type. You may need the password created for the digital ID to complete this task.

1 Choose Advanced > Security Settings.

2 Select Digital IDs on the left.

3 Click the Add ID button .

4 Select one of the following options:

Browse For An Existing Digital ID File Select this option if you obtained a digital ID as an electronic file or if you store it in the Windows certificate store. Follow the prompts to select the digital ID file, type your password, and add the digital ID to the list.

Configure A Roaming ID For Use On This Computer Select this option to use a digital ID that's stored on a signing server. When prompted, type the server name and URL where the roaming ID is located.

Create A Self-signed Digital ID For Use With Acrobat Select this option to create a self-signed digital ID.

Look For Newly Inserted Hardware Tokens Select this option if you have a security token or hardware token connected to your computer.

5 Click Next, and follow the on-screen instructions to register your digital ID.

Create a self-signed digital ID

If you're not using a third-party digital ID, you can create your own self-signed digital ID. When you create a self-signed digital ID, the resulting file stores an encrypted private key used for signing or decrypting documents and a public key contained in a certificate, which is used for validating signatures and encrypting documents.

1 Choose Advanced > Security Settings.

2 Select Digital IDs on the left, and then click the Add ID button .

3 Select Create A Self-Signed Digital ID For Use With Acrobat, and click Next.

4 Specify where to store the digital ID, and click Next.

New PKCS#12 Digital ID File Stores the information in a file that you can send to others. This is a standard encryption format with a .pfx extension in Windows and .p12 in Mac OS.

Windows Certificate Store (Windows only) Stores the file where other Windows applications can also retrieve it.

5 Type a name, email address, and other personal information for your digital ID. When you certify or sign a document, the name appears in the Signatures panel and in the signature field.

6 (Optional) To use Unicode values for extended characters, select Enable Unicode Support, and then specify Unicode values in the appropriate boxes.

7 Choose an option from the Key Algorithm menu. 2048-bit RSA offers more security than 1024-bit RSA, but 1024-bit RSA is more universally compatible.

8 From the Use Digital ID For menu, choose whether you want to use the digital ID for signatures, data encryption, or both. Click Next.

9 Specify a filename and location for the digital ID file.

10 Type a password; passwords are case-sensitive, must contain at least six characters, and may not contain double quotation marks or the following characters: ! @ # $ % ^ & * , | \ ; < > _. Type the same password in both the Password and Confirm Password boxes. Click Finish.

You can export and send your certificate file to those who need to validate your signature.

Important: *Make a backup copy of your digital ID file. If your digital ID file is lost or corrupted, or if you forget your password, you cannot use that profile to add or validate signatures.*

See also

"Sharing and managing certificates" on page 258

Set up a roaming ID account

A *roaming ID* is a digital ID that is stored on a server and can be downloaded—at the subscriber's request—to the roaming subscriber's location. You must have a working Internet connection to access a roaming ID.

1 Choose Advanced > Security Settings.

2 Expand Digital IDs on the left, select Roaming ID Accounts, and click Add Account.

3 Type the name and URL for the roaming ID server, and click Next.

4 Type the user name and password you've been assigned or follow the directions to create a new account. Click Next, and then click Finish.

5 If you don't need to use your roaming ID, select it, and click Logout.

When you perform a task that uses your roaming ID, you're automatically logged in to the roaming ID server if your authentication assertion hasn't expired.

See also

"Configure a directory server manually" on page 262

Smart cards and hardware tokens

A *smart card* looks like a credit card and stores your digital ID on an embedded microprocessor chip. You can use the digital ID on a smart card to sign and decrypt documents on devices that include a smart card reader.

Similarly, a *security hardware token* is a small, keychain-sized device that you can use to store digital IDs and authentication data. You can access your digital ID by connecting the token to a USB port on your computer or mobile device. The token may include a keypad that lets you type a personal identification number (PIN).

If you store your digital ID on a smart card or hardware token, you must specify that information when you sign or certify documents.

See also

"Register a digital ID" on page 254

Change the signing method

You may need to specify a different signing method than the default security method provided in Acrobat.

1 If necessary, install a third-party signature provider.

2 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and click Security on the left.

3 Click Advanced Preferences, and click the Creation tab.

4 From the menu in the Creation tab, choose the default method you want for signing and encrypting documents, and click OK.

The menu lists all the security methods installed in the Acrobat plug-ins folder.

Specify the default digital ID

Before you certify, sign, or encrypt a PDF, you may be prompted to select a digital ID file. To avoid being prompted repeatedly, you can select a digital ID to use every time you sign or certify a document.

1 Choose Advanced > Security Settings.

2 Click Digital IDs on the left, and then select the digital ID you want to use as the default.

3 Click the Usage Options button , and choose a task for which you want the digital ID as the default. If you want to specify the digital ID as the default for two tasks, click the Usage Options button again and select a second option.

A check mark appears next to selected options. If you select only the signing option, the Pen icon appears next to the digital ID. If you select only the encryption option, the Lock icon appears. If you select only the certifying option, or if you select the signing and certifying options, the Blue Ribbon icon appears.

To clear a default digital ID, repeat these steps, and deselect the usage options you selected.

Change a digital ID's password and timeout

Passwords and timeouts can be set for PKCS #12 IDs and Windows Personal Certificates. If the PKCS #12 ID contains multiple IDs, you must configure the password and timeout at the file level.

1 Choose Advanced > Security Settings.

2 Expand Digital IDs on the left, select Digital ID Files, and then select a digital ID on the right.

3 Click the Change Password button. Type the old password and a new password. Confirm the new password, and then click OK.

4 With the ID still selected, click the Password Timeout button.

5 Specify how often you want to be prompted for a password:

Always Prompts you each time you use the digital ID.

After Lets you specify an interval.

Once Per Session Prompts you once each time you open Acrobat.

Never You're never prompted for a password.

6 Type the password, and click OK.

Delete your digital ID

When you delete a digital ID in Acrobat, you delete the actual PKCS #12 file that contains both the private key and the certificate. Before you delete your digital ID, make sure that it isn't in use by other programs or required by any documents for decryption.

Note: *You can delete only self-signed digital IDs that you created in Acrobat.*

1 Choose Advanced > Security Settings.

2 Select Digital IDs on the left, and then select a digital ID on the right.

3 Click Remove ID, and click OK.

See also

"Delete a certificate from trusted identities" on page 261

Protecting digital IDs

By protecting your digital IDs, you can prevent unauthorized use of your private keys for signing or decrypting confidential documents. Make sure that you have a procedure in place in the event your digital ID is lost or stolen.

How to protect your digital IDs

When private keys are stored on hardware tokens, smart cards, and other hardware devices that are password- or PIN-protected, be sure to use a strong password or PIN. Never divulge your password to others. You should not write your password down, but if you must, store it in a secure location. Keep your password strong by following these rules: Use eight or more characters; mix uppercase and lowercase letters with numbers and special characters; choose a password that is difficult to guess or hack, but that you can remember without having to write it down; do not use a correctly spelled word in any language, as these are subject to "dictionary attacks" that can crack these passwords in minutes; change your password on a regular basis. Contact your system administrator for guidelines on choosing a strong password.

To protect private keys stored in P12/PFX files, use a strong password and set your password timeout options appropriately. If using a P12 file to store private keys that you use for signing, set your password timeout option so that your password is always required (this is the default behavior). If using your P12 file to store private keys that are used to decrypt documents, ensure that there is a backup copy of your private key or P12 file so that you can continue to open encrypted documents should you lose your keys.

The mechanisms used to protect private keys stored in the Windows certificate store vary depending on what company has provided the storage. Contact the provider to determine how best to protect these keys from unauthorized access and for backup purposes. In general, you should use the strongest authentication mechanism available and should seek to require a strong password or PIN when possible.

What to do if a digital ID is lost or stolen

If your digital ID was issued by a certificate authority, immediately notify the certificate authority and request the revocation of your certificate. You should also stop using your private key.

If your digital ID was self-issued, destroy the private key and notify anyone to whom you sent the corresponding public key (certificate).

Sharing and managing certificates

Sharing certificates with others

Your digital ID includes a certificate that others require to validate your digital signature and to encrypt documents for you. If you know that others will need your certificate, you can send it in advance to avoid delays when exchanging secure documents. Businesses that use certificates to identify participants in signing and secure workflows often store certificates on a directory server that participants can search to expand their list of trusted identities.

If you use a third-party security method, you usually don't need to share your certificate with others. Third-party providers may validate identities using other methods, or these validation methods may be integrated with Acrobat. See the documentation for the third-party provider.

When you receive a certificate from someone, their name is added to your list of trusted identities as a contact. Contacts are usually associated with one or more certificates and can be edited, removed, or reassociated with another certificate. If you trust a contact, you can set your trust settings to trust all digital signatures and certified documents created with their certificate.

You can also import certificates from a certificate store, such as the Windows certificate store. A certificate store may contain numerous certificates issued by different certification authorities.

Send your certificate to others

1 Choose Advanced > Security Settings.

2 Select Digital IDs on the left.

3 Verify that your certificate information is correct: Select the digital ID you want to share, and click the Certificate Details button . Click OK to return to the Security Settings dialog box.

4 With the digital ID selected, click the Export button .

5 Do one of the following:

- Select Email The Data To Someone, and click Next to send your certificate as an FDF file to another user. Type the email address, click Email, and then send the email message that appears in the default email application.
- Select Save The Data To A File, and click Next. Choose a file type from the menu, specify a name and location for the file, and click Save.

Get certificates from other users

You keep certificates that you receive from other users in a list of trusted identities. This list is like an address book that stores certificates. It lets you validate the signatures of these users on any documents you receive. You can also use the list to encrypt files.

See also

"Encrypt a PDF and create a recipient list" on page 266

Request a certificate from another user

1 Choose Advanced > Manage Trusted Identities.

2 Click Request Contact.

3 Type your name, email address, and contact information.

4 To allow other users to add your certificate to their list of trusted identities, select Include My Certificates.

5 Select whether to email the request or save it as a file to email later, and then click Next.

6 Select the digital ID file to use, and then click Select.

7 Do one of the following:

- If the Compose Email dialog box appears, type the email address of the person you're requesting a certificate from, and click Email. Send the email message that appears, with the attached certificate, in the default email application.
- If the Export Data As dialog box appears, specify a name and location for the file, click Save, and then click OK.

Add a certificate from email

1 After a user sends you certificate information, open the email attachment in Acrobat, and then click Set Contact Trust in the dialog box that appears.

2 Select trust options, click OK, and follow the prompts.

Add a Windows certificate (Windows only)

This option is recommended if you use the Windows certificate store to organize certificates.

1 In the Security preferences, click Advanced Preferences.

2 Click the Windows Integration tab, and select Enable Searching The Windows Certificate Store For Certificates Other Than Yours. Select the desired options, and click OK twice.

3 Choose Advanced > Manage Trusted Identities.

4 Click Add Contacts.

5 Do any of the following:

- If Windows certificate digital IDs are allowed, select the appropriate directory and group.
- If you configured an identity search directory, select the appropriate directory and group. You can then click Search to locate specific certificates.
- Click Browse, select the certificate file, and click Open.

6 Select the added certificate in the Contacts list to add it to the Certificates list. Select the certificate in the Certificates list, and click Details.

7 In the Certificate Viewer dialog box, click the Details tab and note the MD5 digest and SHA1 digest values (fingerprint). Contact the certificate's originator to confirm that the values are correct. The certificate should be trusted only if the values are correct. Click OK.

8 After you verify that the information is correct, click Trust, specify trust options, and click OK.

Import certificates using the Windows Certificate Wizard (Windows only)

If you use the Windows certificate store to organize your certificates, you can import certificates using a wizard in Windows Explorer.

1 In Windows Explorer, right-click the certificate file and choose Install Certificate.

2 Follow the on-screen instructions to add the certificate to the Windows certificate store.

3 If you're prompted to validate the certificate before installing it, note the MD5 digest and SHA1 digest values (fingerprint). Contact the certificate's originator to confirm that the values are correct. The certificate should be trusted only if the values are correct. Click OK.

Add a certificate using a signature in a PDF

You can safely add a certificate to your trusted identities from a signed PDF by first verifying the fingerprint with the certificate's originator.

1 Open the PDF containing the user's self-signed signature.

2 Click the signature in the document to check whether it's valid.

3 Click Signature Properties, and then click Show Certificate.

4 In the Certificate Viewer dialog box, click the Details tab and note the MD5 digest and SHA1 digest values (fingerprint). Contact the certificate's originator to confirm that the values are correct. The certificate should be trusted only if the values are correct.

5 After you verify that the certificate information is correct, click the Trust tab, click Add To Trusted Identities, click OK, specify trust options, and click OK.

Associate a certificate with a contact

Contacts are typically trusted identities with whom you exchange documents. To exchange encrypted PDFs with a contact, you must associate at least one certificate with that contact.

Adding a contact may or may not add a certificate because certificates aren't necessarily attached to the contact information. Add contact information by browsing to the contact file location or search for the file.

1 Choose Advanced > Manage Trusted Identities.

2 Select the contact, and click Details.

3 Select a name from the list, and click Associate Certificate.

4 Select a certificate, and click OK. Click OK again.

Verify information on a certificate

The Certificate Viewer dialog box provides user attributes and other information about a certificate. When other users import your certificate, they may ask you to check your *fingerprint* information against the information they receive with the certificate. (The fingerprint refers to the MD5 digest and SHA1 digest values.) You can check certificate information for your own digital ID files or for ID files that you import.

The Certificate Viewer dialog box provides the validation period in which the certificate is valid, the certificate's intended usage, and certificate data such as a unique serial number and public key method. You can also check if the certificate authority has revoked the certificate. Certificates are typically revoked when an employee leaves the company or when security is compromised in some way.

Verify information on your own certificate

1 Choose Advanced > Security Settings.

2 Select your digital ID, and then click Certificate Details .

Verify information on someone else's certificate

1 Choose Advanced > Manage Trusted Identities.

2 Select the contact, and click Details.

3 Select the certificate name, and click Show Certificate.

4 Click the Revocation tab, and then click Check Revocation.

The results of the revocation check appear in the Details box.

Set the trust level of a certificate

You can change the trust settings of certificates. For example, if you have verified the fingerprint in a certificate that you received from someone else, you can change the settings so that you explicitly trust all digital signatures and certified documents created with this certificate. You can even choose to trust the certified document's dynamic content and embedded JavaScript.

A certificate must be explicitly trusted before you can use it to encrypt PDFs for the person associated with that certificate. If you have multiple certificates for a person, set trust levels for at least one of their certificates.

You can also trust a certificate by trusting the root certificate. The root certificate is the originating authority in a chain of certificate authorities that issued the certificate. By trusting the root certificate, you trust all certificates issued by that certificate authority. Exercise caution when trusting root certificates.

1 Choose Advanced > Manage Trusted Identities.

2 Select a contact, and click Details.

3 Select the certificate name, and click Edit Trust.

4 In the Trust tab, select any of the following items to trust this certificate for:

Signatures And As a Trusted Root Trusts signatures for this certificate and trusts the certificate as a trusted root so that any other certificates that have this certificate as the root in a certificate chain are also trusted.

Certified Documents Trusts documents in which the author has certified the document with an author signature.

Dynamic Content Trusts movies, sound files, and other dynamic elements.

Embedded High Privilege JavaScript Trusts embedded scripts.

5 Click OK, click OK again, and then click Close.

Delete a certificate from trusted identities

1 Choose Advanced > Manage Trusted Identities.

2 Choose Certificates from the Display menu.

3 Select the certificate, and click Delete.

Directory servers

About directory servers

Directory servers are commonly used as centralized repositories of identities within an organization. As such, the server acts as an ideal location to store user certificates in enterprises that use certificate encryption. Directories help you locate certificates from network servers, including LDAP (Lightweight Directory Access Protocol) servers. After you locate a certificate, you can add it to your list of trusted identities so that you don't have to look it up again. By developing a storage area for trusted certificates, you or a member of your workgroup can facilitate the use of encryption in the workgroup.

Configure a directory server manually

1 Choose Advanced > Security Settings.

2 Select Directory Servers on the left.

3 Click the New button , type the directory name and server settings, and click OK.

For more information on server settings, contact your system administrator.

Import and export directory server settings

Administrators and users can export directory settings as a Form Data Format (FDF) file, and use that file to configure the directory server on another computer. As you export the file, you can choose to send it as a signed email attachment.

Export directory server settings

1 Choose Advanced > Security Settings.

2 Select Directory Servers on the left, and select a server on the right.

3 Click Export.

4 Select a destination, and click Next.

5 If you need to verify the information in the FDF file, click Sign, add your signature, and then click Next.

6 Do one of the following:

- If you're saving the file, specify a name and location for it, and click Save.
- If you're sending the file as an email attachment, type an email address in the To box, click Next, and then click Finish.

Import directory server settings

1 Do one of the following:

- Double-click the FDF file.
- Choose Advanced > Security Settings, select Directory Servers on the left, and then click Import. Select the FDF file, and click Open.

2 If the FDF file is signed, right-click/Control-click the signature and choose options to validate the signature or view signature properties.

3 Click Import Search Directory Settings.

4 Click OK if prompted to confirm your choice, and then click Close.

The directory server appears in the Security Settings dialog box.

Securing PDFs

Choosing which type of security to use

Acrobat takes advantage of the security features of Windows XP and a number of other security systems. You can secure a PDF by using the following security methods:

Note: *"Security" is sometimes confused with "accessibility," which involves making documents easier to read for the visually impaired.*

Password encryption Add passwords and set security options to restrict opening, editing, and printing PDFs.

Certification encryption Encrypt a document so that only a specified set of users has access to it.

Certify a document Save the PDF as a certified document. Certifying a PDF adds a (visible or invisible) certifying signature that lets the document author restrict changes to the document.

Server-based security policies Apply server-based security policies to PDFs (for example, using Adobe LiveCycle Policy Server). Server-based security policies are especially useful if you want others to have access to PDFs for a limited time.

Before you secure a PDF, you may want to remove any sensitive or dynamic page content that can compromise the document's integrity. If others will be filling in, or signing, form fields in the document, you may want to set the form field properties to read-only to prevent modifications to the form fields.

If you want to do this:	Do this:
Require a password to open a PDF, or copy or print its contents	Secure the document by choosing Password Encryption from the Secure button in the Tasks toolbar. If your company is signed up, you can also use Adobe LiveCycle Policy Server to secure documents.
Indicate that you approve of the PDF's content	Sign and certify the PDF. You must obtain a digital ID to add digital signatures. For Asian languages, you can add an approval stamp.
Prevent forms from being tampered with	Use LiveCycle Designer to secure forms and create locking signature fields. See the Adobe LiveCycle Designer Help.
Send secure file attachments via email	Use security envelopes.
Allow only the people you specify to view a PDF	Encrypt the document. Choose Certificate Encryption from the Secure button in the Tasks toolbar, or apply security using Adobe LiveCycle Policy Server. You must have certificates for those who can view the documents.

If you often apply the same security settings to PDFs, consider creating a security policy to simplify your workflow. Both Adobe LiveCycle Policy Server and certificate encryption let you save settings as a policy. If you apply security settings to large collections of PDFs, you can automate the steps by using the Batch Processing command.

See also

"Removing sensitive content" on page 248

"Modify form field properties in Acrobat" on page 222

"Run a predefined batch sequence" on page 364

Securing PDFs in FIPS mode (Windows)

Version 8.1 of Acrobat and Reader provides a FIPS mode to restrict data protection to Federal Information Processing Standard (FIPS) 140-2 approved algorithms using the RSA BSAFE Crypto-C 2.0 encryption module with FIPS 140-2 validation certificate 608.

The following options aren't available in FIPS mode:

- Applying password-based security policies to documents. You can use public key certificates or Adobe LiveCycle Policy Server to secure the document, but you cannot use password encryption to secure the document.
- Creating self-signed certificates. In FIPS mode, you cannot create self-signed certificates.

In FIPS mode, you can open and view documents that are protected with non-FIPS compliant algorithms, but you cannot save any changes to the document using password security. To apply security policies to the document, use either public key certificates or LiveCycle Policy Server.

Configure FIPS mode (Windows)

1 Exit from Acrobat.

2 Choose Start > Run, and then type **regedit** in the Open box.

3 Navigate to the following key in the registry: HKEY_CURRENT_USER>SOFTWARE>Adobe>Adobe Acrobat>8.0>AVGeneral.

4 Right-click AVGeneral, and then select New > DWORD Value.

5 Change the name of the new value to bFIPSMode.

6 In the right pane of the Registry Editor, double-click bFIPSMode.

7 Set the value of bFIPSMode to 1 to enable or 0 to disable FIPS mode.

Set passwords for PDFs

You can limit access to a PDF by setting passwords and by restricting certain features, such as printing and editing.

A PDF can have two kinds of passwords: a Document Open password and a Permissions password. When you set a Document Open password (also known as a *user* password), anyone who tries to open the PDF must type in the password you specify. When you set a Permissions password (also known as a *master* password), recipients don't need a password to open the document, but they must type the Permissions password to set or change the restricted features. If the PDF is secured with both types of passwords, it can be opened with either password, but only the Permissions password allows the user to change the restricted features. Because of the added security, setting both types of passwords is preferable to setting just one.

All Adobe products enforce the restrictions set by the Permissions password. However, because third-party products may not support or respect these settings, document recipients may be able to bypass some or all of the restrictions you set.

Important: *If you forget a password, there's no way to recover it from the PDF. Consider keeping a backup copy of the PDF that isn't password-protected.*

See also

"Secure PDFs using policies" on page 273

Add a password and security

1 Click the Secure button in the Tasks toolbar, and choose Password Encrypt.

2 Click Yes to the prompt about changing the security, and if necessary, type the Permissions password that lets you change security settings. If you don't know the password, contact the author of the PDF.

3 In the Password Security - Settings dialog box, set the security options as desired, confirm the password, click OK, and then click OK again.

4 Save the document to apply the security settings.

Note: *You can also restrict editing capabilities when you certify a document, or when you apply a policy to a PDF.*

Remove passwords and security settings

You can remove passwords and security policies from an open PDF if you have the permissions to do so. If the PDF is secured with a security policy that resides on a server, the changes can be made only by the author of the policy or by a server administrator.

1 Do one of the following:

- Click the Secure button in the Tasks toolbar, and choose Remove Security. Type your password, and click Yes to the prompt about removing the security.
- In the Security tab of the Document Properties dialog box, choose No Security from the Security Method menu.

2 When prompted, specify the Permissions password, and then click OK.

Security options

You can set the following options when you create a PDF or when you apply password protection to a PDF. Options vary depending on the Compatibility setting. Security options are not available for PDF/X standards or presets.

Compatibility Sets the type of encryption for opening a password-protected document. The Acrobat 3 And Later option uses a low encryption level (40-bit RC4), while the other options use a high encryption level (128-bit RC4 or AES). Acrobat 6 And Later lets you enable metadata for searching.

Be aware that anyone using an earlier version of Acrobat cannot open a PDF document with a higher compatibility setting. For example, if you select the Acrobat 7 And Later option, the document cannot be opened in Acrobat 6.0 or earlier.

Encrypt All Document Contents Select this option to encrypt the document and the document metadata. If this option is selected, search engines cannot access the document metadata.

Encrypt All Document Contents Except Metadata Select this option to encrypt the contents of a document but still allow search engines access to the document metadata.

Encrypt Only File Attachments Select this option to require a password for opening file attachments. However, users can open the document without a password.

Require A Password To Open The Document Select this option to require users to type the password you specify to open the document. This option is unavailable if Encrypt Only File Attachments is selected.

Document Open Password Specify the password that users must type to open the PDF file.

Note: *If you forget a password, there is no way to recover it from the document. It's a good idea to store passwords in a separate secure location in case you forget them.*

Use A Password To Restrict Editing And Printing Of The Document Restricts access to the PDF file's security settings. If the file is opened in Adobe Acrobat, the user can view the file but must enter the specified Permissions password in order to change the file's Security and Permissions settings. If the file is opened in Illustrator, Photoshop, or InDesign, the user must enter the Permissions password, since it is not possible to open the file in a view-only mode.

Permissions Password Specify a password that is required to change the permissions settings. This option is available only if the previous option is selected.

Printing Allowed Specifies the level of printing that users are allowed for the PDF document.

- **None** Prevents users from printing the document.
- **Low Resolution (150 dpi)** Lets users print at no higher than 150-dpi resolution. Printing may be slower because each page is printed as a bitmap image. This option is available only if the Compatibility option is set to Acrobat 5 (PDF 1.4) or later.
- **High Resolution** Lets users print at any resolution, directing high-quality vector output to PostScript and other printers that support advanced high-quality printing features.

Changes Allowed Defines which editing actions are allowed in the PDF document.

- **None** Prevents users from making any changes to the document that are listed in the Changes Allowed menu, such as filling in form fields and adding comments.
- **Inserting, Deleting, And Rotating Pages** Lets users insert, delete, and rotate pages, and create bookmarks and thumbnails. This option is only available for high (128-bit RC4 or AES) encryption.
- **Filling In Form Fields And Signing Existing Signature Fields** Lets users fill in forms and add digital signatures. This option doesn't allow them to add comments or create form fields. This option is only available for high (128-bit RC4 or AES) encryption.
- **Commenting, Filling In Form Fields, And Signing Existing Signature Fields** Lets users add comments and digital signatures, and fill in forms. This option doesn't allow users to move page objects or create form fields.
- **Page Layout, Filling In Form Fields, And Signing** Lets users insert, rotate, or delete pages and create bookmarks or thumbnail images, fill out forms, and add digital signatures. This option doesn't allow them to create form fields. This option is only available for low (40-bit RC4) encryption.
- **Any Except Extracting Pages** Lets users edit the document, create and fill in form fields, and add comments and digital signatures.

Enable Copying Of Text, Images, And Other Content Lets users select and copy the contents of a PDF.

Enable Text Access For Screen Reader Devices For The Visually Impaired Lets visually impaired users read the document with screen readers, but doesn't allow users to copy or extract the document's contents. This option is available only for high (128-bit RC4 or AES) encryption.

Encrypt a PDF and create a recipient list

To encrypt PDFs, you use *public-key cryptography*. Public-key cryptography uses two keys: a public key, which is stored inside a certificate that can be shared with other users, and a private key, which you don't share with others. The public key (certificate) is used to encrypt documents or to verify digital signatures, and the private key is used to decrypt documents or to create digital signatures. Both keys are included in a *digital ID*.

The advantage of securing documents with certificates is that authors can specify unique permissions for each group in their company. For example, authors can permit employees to sign and fill forms, and permit managers to edit text or remove pages. When you encrypt a PDF using a certificate, you specify a list of recipients and define each recipient's level of access to the file—for example, whether the recipient can edit, copy, or print the file. You can specify certificates from your list of trusted identities, from files on disk, from an LDAP server, or from the Windows certificate store (Windows only). Be sure to include your own certificate in the list so that you are later able to open the document.

Note: *If possible, encrypt documents using certificates from third-party digital IDs. If the certificate is lost or stolen, the issuing authority can replace it. If a self-signed digital ID is deleted, all PDFs that were encrypted using the certificate from that ID are forever inaccessible.*

If you need to encrypt a large number of PDFs, use the Batch Processing command to apply a predefined sequence, or edit an existing sequence to add the security features you want. You can also save your certificate settings as a security policy and reuse it to encrypt PDFs.

1 Do one of the following:

- Click the Secure button in the Tasks toolbar, choose Show Security Properties, and then choose Certificate Security from the Security Method menu. (Use this method if you want to save your settings as a security policy.)
- Choose Advanced > Security > Certificate Encryption.
- Click the Secure button in the Tasks toolbar, and choose Certificate Encryption.

2 In the Certificate Security Settings dialog box, specify whether to save your settings as a policy or discard them after applying (if available).

3 Select which document components to encrypt.

4 From the Encryption Algorithm menu, choose 128-bit AES or 128-bit RC4. If you select 128-bit AES, Adobe Acrobat 7.0 or later or Adobe Reader 7.0 or later is required to open the document. Click Next.

5 Select the digital ID you want to use.

6 Create a recipient list for the encrypted PDF: Click Search to locate identities in a directory server or in your list of trusted identities, or click Browse to locate the file that contains certificates.

7 In the Recipients list, select the recipient(s) for whom you wish to set levels of access, click Permissions, and click OK in the Acrobat Security dialog box. Then select the levels of access. If you don't set permissions, recipients have full access by default.

8 Click OK to implement your settings, and then click Next. Review your settings and then click Finish.

When a recipient opens the PDF, the security settings you specified for that person are used.

See also

"About digital IDs" on page 253

"Get certificates from other users" on page 258

Change or remove encryption from a PDF

You can change or remove security settings from PDF files that you've encrypted.

Change encryption settings

1 Click the Secure button in the Tasks toolbar, and choose Show Security Properties.

2 Click Change Settings.

3 Do any of the following, and then click Next.

- To encrypt different document components, select that option.
- To change the encryption algorithm, choose it from the menu.

4 Do any of the following:

- To check a recipient's trusted identity, select the recipient, and then click Details.
- To remove recipients, select one or more recipients, and then click Remove. Do not remove your own certificate from this list, or you won't have access to the file using that certificate.
- To change recipients' permissions, select one or more recipients, and then click Permissions.

5 Click Next, and then click Finish. Click OK to close the Document Properties dialog box, and save the document to apply your changes.

Remove encryption settings

1 Click the Secure button in the Tasks toolbar, and choose Remove Security.

2 If prompted, type the Permissions password. If you don't know the Permissions password, contact the author of the PDF.

Create secure attachments

You can add security to any document by embedding it in an encrypted envelope, called a *security envelope* (or *eEnvelope*, in earlier versions) and sending it as an email attachment. This method is especially useful if you want to send a secure file attachment without modifying the attached file. When other users open the security envelope, they can extract the file attachments and save them to disk. The saved files are identical to the original file attachments and are no longer encrypted when saved.

For example, suppose that you want to send several documents, including non-PDF documents, to your accountant, but you don't want anyone else to view the documents. You can embed these documents as file attachments in a security envelope, encrypt the security envelope so that only your accountant can open the attachments, and then email the envelope. Anyone can open the envelope, view its cover page, and even view a list of the contents of that envelope, but only your accountant can view the embedded attachments and extract them to the computer.

When you create a secure attachment, you're prompted to select or create a security policy.



Embed file attachments in security envelopes for secure transit.

1 Click the Secure button in the Tasks toolbar, and choose Create Security Envelope.

2 Click Add File To Send, select the documents you want to attach, and then click Open. Select any PDFs in the list that you don't want to include and click Remove Selected Files.

3 Click Next.

4 Select an envelope template, and click Next.

5 Select a delivery method, and click Next.

6 Select Show All Policies, and then select a security policy from the list of available policies (or create a new policy if needed). Click Next.

7 Follow the on-screen instructions to complete the security envelope. If prompted, provide your identity information.

8 Type an email address in the message that appears and click Send, or save the security envelope to send later.

See also

"Secure PDFs using policies" on page 273

Security policies

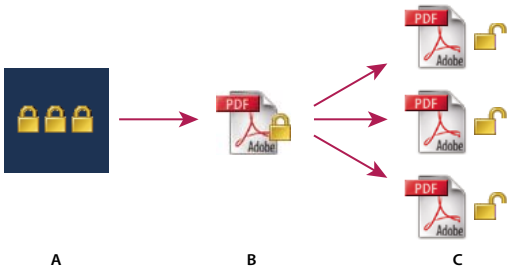
About security policies

If you often apply the same security settings to multiple PDFs, you can save your settings as a policy that you can reuse. Security policies include the type of security encryption, the permission settings, and information about who can open the PDFs or change security settings. There are two kinds of security policies:

- A *user policy* is developed and applied by an individual user. If you apply the same security settings to various documents, you can save time by creating a user policy and then reapplying the user policy to documents without having to specify the security settings each time. User policies for passwords and public key certificates are stored on your local computer. If you have access to Adobe LiveCycle Policy Server, you can create a user policy that's stored on a policy server and is available only to you.
- An *organizational policy* is created by an Adobe LiveCycle Policy Server administrator and is stored on a policy server to be shared by a group of users. Adobe LiveCycle Policy Server controls access to PDFs and auditing events as defined by the security policy. You can use Adobe LiveCycle Policy Server if your company has licensed the software and made it available to you.

How organizational policies are authenticated

In addition to allowing the reuse of the same security settings, policies stored on Adobe LiveCycle Policy Server have the added benefit of letting you expire and revoke documents (no matter how many copies were created or distributed), and maintain accountability by auditing users who open protected documents.



Security policies
A. *Policies are stored on server.* ***B.*** *Policies are applied to PDF.* ***C.*** *Users can open, edit, and print document only if permitted by policy.*

The process of using server-based security policies involves four main stages:

Configure the policy server The system administrator of your company or group usually configures Adobe LiveCycle Policy Server, manages accounts, and sets up organizational policies. For more information on configuring the policy server, see the Adobe website.

Publish a document with a security policy An author creates a PDF and applies a policy stored on Adobe LiveCycle Policy Server to the PDF. The policy server generates a license and unique encryption key for the PDF. Acrobat embeds the license in the PDF and encrypts it using the encryption key. The author or administrator can use this license to track and audit the PDF.

View a document with a policy applied When users try to open the secure PDF in Acrobat 8.0 (or Reader 8.0), they must authenticate their identities. If the user is granted access to the PDF, the PDF is decrypted and opens with whatever permissions are specified in the policy.

Administer events and modifying access By logging in to an Adobe LiveCycle Policy Server account, the author or administrator can track events and change access to policy-secured PDFs. Administrators can view all PDF and system events, modify configuration settings, and change access to policy-secured PDFs. Users may be required to check in the PDF periodically to continue to have access to it.

Adobe LiveCycle Policy Server

Adobe LiveCycle Policy Server is a server-based security system that provides dynamic control over PDFs. Adobe LiveCycle Policy Server can be configured to run with LDAP, ADS, and other enterprise systems. Policies provided by Adobe LiveCycle Policy Server are stored on the server and can be refreshed from the server. You must connect to Adobe LiveCycle Policy Server to use these server policies.

While security policies are stored on a policy server, the PDFs aren't. However, users may be required to connect to the policy server so that they can open or continue to use PDFs to which a security policy has been applied. For information on configuring an Adobe LiveCycle Policy Server, click Help on the Adobe LiveCycle Policy Server website after you log in to your account.

Connect to an Adobe LiveCycle Policy Server

1. Choose Advanced > Security Settings.
2. Click Adobe LiveCycle Policy Servers on the left.
3. Click the New button .
4. Type a name in the Name box and the URL in the Server Name box. Add the port number and click Connect To This Server.

5 Type the user name and password for your account, and click OK.

View Adobe LiveCycle Policy Server policies

1 Click the Secure button in the Tasks toolbar, and choose Adobe Policy Server > Manage My Account.

The Adobe LiveCycle Policy Server page opens in your web browser.

2 If prompted, type your user name and password, and click Login.

3 Click the Policies link on the page.

For more information on using Adobe LiveCycle Policy Server, click the Help link in the upper right corner.

Create a user security policy

You can create three types of security policies: password security (to password-protect documents), certificate security (to encrypt documents for a list of recipients), and Adobe LiveCycle Policy Server policies. Creating policies for password and certificate security lets you reuse the same security settings for a set of PDFs without having to change security settings for each. The policies for password and certificate security are stored on the local computer.

When you create a user security policy using Adobe LiveCycle Policy Server, the policy is stored on a server, letting you audit actions and change security settings dynamically. You can use Adobe LiveCycle Policy Server if your company has licensed the software and made it available to you.

See also

"Encrypt a PDF and create a recipient list" on page 266

Create a password policy

1 Choose Advanced > Security > Manage Security Policies.

2 Click New.

3 Select Use Passwords, and then click Next.

4 Type a name and description for the policy, do one of the following, and then click Next:

- If you want to specify passwords and restrictions whenever you apply this policy to a document, deselect Save Passwords With The Policy.
- If you want to save passwords and restriction settings with the policy, select Save Passwords With The Policy.

5 Specify a compatibility setting and password options. If you selected Save Passwords With The Policy, specify the password and restrictions. Click Next.

6 Review the policy details, and then click Finish.

Create a certificate policy

1 Choose Advanced > Security > Manage Security Policies.

2 Click New.

3 Select Use Public Key Certificates, and then click Next.

4 Type a name and description for the policy, and specify the document components to encrypt.

5 If you want to specify recipients whenever you apply this policy to a document, select Ask For Recipients When Applying This Policy, and click Next.

6 If Ask For Recipients When Applying This Policy is not selected, specify recipients by selecting the digital IDs you want to use to encrypt the document (including your own digital ID), and click Next.

7 Click Finish.

Create a user policy with Adobe LiveCycle Policy Server

When you create a user policy using the Adobe LiveCycle Policy Server, you're redirected to the Adobe LiveCycle Policy Server web page.

1 Choose Advanced > Security > Manage Security Policies.

2 Click New.

3 Select Use The Adobe LiveCycle Policy Server, and click Next.

4 On the Adobe LiveCycle Policy Server web page, click Policies, and then click New.

5 Type a name and description, set the validity period, and any other options.

6 Select the users or groups, set permissions for them, and click OK.

7 Specify the document components you want to encrypt, and whether you want a watermark.

8 When you're done, click Save at the top of the page.

Manage security policies

After you create security policies, you can manage them by copying, editing, and deleting them. You can also set up a list of favorite policies so that they're easy to access.

1 Choose Advanced > Security > Manage Security Policies.

2 From the Show menu, choose whether you want to display all policies that you have access to, user policies that you've created, or organizational policies.

3 Select a policy and do one or more of the following:

Note: *Options to edit or delete organizational policies aren't available unless you have administrator rights to the Adobe LiveCycle Policy Server. Changes to these policies can be made only on the Adobe LiveCycle Policy Server, which opens automatically when you select an option.*

- To create a new policy, click New.
- To copy an existing policy, click Copy. This option is useful if you want to create a new policy that's based on the settings of an existing policy.
- To edit a policy, click Edit. For password and certificate policies, which are stored on the local computer, editing a policy affects only those documents to which the policy is applied after the policy is edited. For user policies stored on a server, you can edit the permission settings and other options. This option isn't available for organizational policies.
- To delete the policy, click Delete. This option may not be available for organizational policies.
- To make the policy easier to get to, click Favorite. This option adds the selected policy to the Secure menu in the Tasks toolbar, and to the Advanced > Security menu. You can apply the Favorite option to multiple policies.

A star appears next to a favorite policy. (To remove a policy from the favorites, click Favorite again.)

4 Click Close.

Secure PDFs using policies

You can apply either an organization policy or a user policy to a PDF. You must be online with a connection to your Adobe LiveCycle Policy Server host to apply an Adobe LiveCycle Policy Server policy to a document. Adobe LiveCycle Policy Server security policies must be stored on a policy server, but PDFs to which the policies are applied need not be. You can apply policies to PDFs using Acrobat, server-side batch sequences, or other applications, such as Microsoft Outlook.

To remove a policy from a PDF, you must be the one who applied it. Similarly, only the person who created the user policy can edit it. To edit organizational policies, you must be the policy administrator. For details on editing security policies, click the Secure button in the Tasks toolbar, choose Adobe Policy Server > Manage My Account, and then click Help in the upper right corner.

See also

"Adobe LiveCycle Policy Server" on page 270

Apply a security policy to a PDF

❖ Open a PDF, and do one of the following:

- Click the Secure button in the Tasks toolbar and choose Adobe Policy Server > Refresh Security Policies to ensure that you have access to the most up-to-date server policies. Then, click the Secure button in the Tasks toolbar and choose a policy. Click OK to any warnings about changing the security for the document.

In the Secure menu, you can identify organizational policies by the Enterprise Policy icon, and user policies by the Personal Policy icon.

- Choose Advanced > Security > Manage Security Policies. Select a policy, and then click Apply To Document.

Apply a policy to attachments in Outlook

You can send different types of files as secure PDF attachments in Microsoft Outlook. This option is available only if Adobe LiveCycle Policy Server is set up and available in Acrobat.

1 In Outlook, choose File > New > Mail Message.

2 In the toolbar, click the Attach As Secured Adobe PDF button.

3 Select the file you want to attach by typing the file path or by clicking Browse.

4 Specify how you want to secure the document, and click OK.

The file is converted to PDF and encrypted using the security method you choose.

5 Complete the email message, and then click Send.

Remove a user security policy from a PDF

❖ Click the Secure button in the Tasks toolbar, choose Remove Security, and click OK.

Revoke a policy-protected PDF

If you need to restrict access to a policy-protected PDF that you made available to a group of users, you can revoke the document.

1 Open the PDF to which you applied the policy, and log in to the Adobe LiveCycle Policy server.

2 Choose Advanced > Security > Adobe Policy Server > Revoke Document.

3 From the menu on the web page, choose an option that explains why you're revoking the document or type a message. If you're replacing the revoked document, type the URL location of the new document.

4 Click OK to save your changes.

Chapter 9: Digital signatures

You use a digital signature much like a handwritten signature—to approve documents. A digital signature verifies your identity and may include a photo, an image of your handwritten signature, or other personal details that you choose. Document authors can attest to the contents of their documents by adding a certifying signature. If you receive a signed Adobe PDF, status icons let you know if the signature is valid. If a signature is questionable, you can verify it manually.

Quickstart

The following topics provide overview steps to some common digital signature tasks.

Create a signature appearance

You can modify your digital signature appearance. For example, you can include your scanned signature.

1. (Optional) Save the desired image on a page by itself, and convert the page to PDF.
2. Choose Edit > Preferences (Windows) or Acrobat (Mac OS) > Preferences, and select Security.
3. Click New, and type a title.
4. (Optional) Select Imported Graphic, click File, and select the desired file.
5. Specify options as desired.

See also

"Create the signature appearance" on page 276

Sign a PDF

Use a digital signature to indicate your approval. For best results, change your security preferences to always sign in Preview Document mode, so that you can view and sign the PDF in a secure state.

1. Click the signature field. Or, click Sign , and choose Sign Document.
2. Follow the on-screen instructions to apply your digital signature.

If the document does not contain an unsigned signature field, click Sign and choose Place Signature to sign the PDF.

See also

"Sign a PDF" on page 279

Certify a PDF

Certifying a PDF indicates that you approve of its content and allows you to specify the types of changes that are permitted for the PDF to remain certified.

1. Click Sign on the Tasks toolbar, choose Certify With Visible Signature or Certify Without Visible Signature, and click OK.

2 If certifying with a visible signature, draw a signature field.

3 Follow the on-screen instructions to apply the certifying signature.

4 Save the PDF using a different filename.

See also

"Certify a PDF" on page 281

Validate signatures

When you open a document, a status icon appears next to the signature, indicating if the signature is valid.

1 Click Signatures in the navigation pane, and select the signature.

2 Right-click/Control-click and choose Show Signature Properties.

3 Use the various tabs and options in the Signature Properties dialog box to resolve any signature issues. For example, if the identity is unknown or unverified, click the Signer tab, and click Show Certificate to determine if the certificate is trusted.

See also

"Validating signatures" on page 282

Digital signatures

About digital signatures

A *digital signature*, like a conventional handwritten signature, identifies the person signing a document. Unlike a handwritten signature, a digital signature is difficult to forge because it contains encrypted information that is unique to the signer and easily verified.

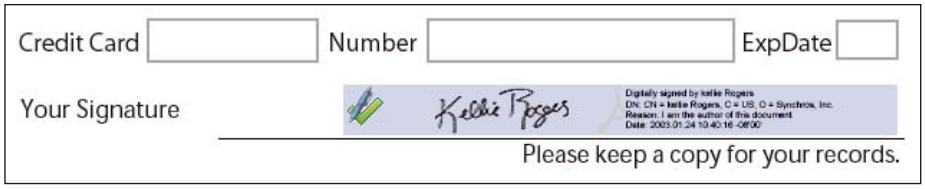
Most digital signatures are referred to as *approval signatures*. Signatures that certify a PDF are called *certifying signatures.* Only the first person to sign a PDF (most often, the author) can add a certifying signature. A certifying signature attests to the contents of the document and allows the signer to specify the types of changes allowed for the document to remain certified. Changes to the document are detected in the Signatures panel.

To sign a document, you must obtain a digital ID or create a self-signed digital ID in Acrobat. The digital ID contains a private key that is used to add the digital signature, and it contains a certificate that you share with those who need to validate your signature.

Note: *You cannot create self-signed digital IDs from within FIPS mode.*

When you apply a digital signature, Acrobat uses a hashing algorithm to generate a message digest, which it encrypts using your private key. Acrobat embeds the encrypted message digest in the PDF, along with details from your certificate, a visual representation of your signature, and a version of the document at the time it was signed.

Note: *For the latest information about digital signatures, choose Help > Online Support > Knowledge Base to open the Adobe Acrobat support page on the Adobe website, and then search for "digital signatures."*



Valid digital signature in a PDF form

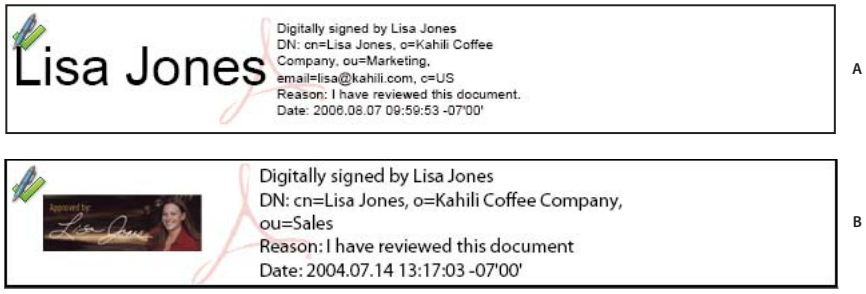
See also

"About digital IDs" on page 253

Create the signature appearance

You can set the appearance of your digital signature by selecting options in the Security Preferences. For example, you can include an image of your handwritten signature, a company logo, or a photograph. You can also create alternate signature appearances that you use for different purposes. For some, you may want to provide a greater level of detail.

A signature appearance can also include information that helps others verify your signature, such as certificate revocation status, reasons for signing, contact information, and more. By selecting these preferences, you add options to the Sign Document dialog box that appears each time you sign a PDF.



Signature formats
***A.** Text signature **B.** Graphic signature*

1 If you want to include an image of your handwritten signature in the digital signature, scan your signature and save it as an image file. Place the image in a document by itself, and convert the document to PDF.

2 Choose Edit > Preferences (Windows) or Acrobat (Mac OS) > Preferences, select Security on the left, and then click New to create a new signature appearance.

3 In the Configure Signature Appearance dialog box, type a title for the signature appearance. When you sign a document, you select the signature appearance by its title, so use a short, descriptive title.

4 For Configure Graphic, choose an option:

No Graphic Displays only the default digital signature icon and other information specified in the Configure Text section.

Imported Graphic Displays an image with your digital signature. Select this option to include an image of your handwritten signature. To import the image file, click File, click Browse, select the image file, click Select, and then click OK (Windows) or Select (Mac OS).

Name Displays only the default digital signature icon and your name as it appears in your digital ID file.

5 For Configure Text, select the options that you want to appear in the signature. Distinguished Name shows the user attributes defined in your digital ID, including your name, organization, and country.

Important: *To include a reason and a location in your signature, you must select those options both in this dialog box and in the Advanced Preferences.*

6 For Text Properties, specify the writing direction and type of digits (Western or Arabic-Indic) used, and then click OK.

7 Click Advanced Preferences, click the Creation tab, select any of the following, click OK, and click OK again:

Include Signature's Revocation Status When Signing Embeds information about whether your certificate is valid or has been revoked (required for signature validation). Selecting this option speeds the validation process by not having to go online to determine whether the certificate has been revoked.

Show Reasons When Signing Adds your reason for signing to the signature field. When you sign a PDF, a menu appears in the Sign Document dialog box from which you can select the option that best describes your reason for signing the PDF.

Show Location And Contact Information When Signing Adds your location information to the signature field. Contact information appears in the Signer tab of the Signature Properties dialog box. When you sign a PDF, text boxes appear in the Sign Document dialog box where you can type this information.

Enable Reviewing Of Document Warnings Analyzes documents in a signing workflow for content that might change the document appearance and then provides an option in the Sign Document dialog box to review this content. Specify Always, Never, or When Certifying A Document. Available options depend on the Prevent Signing Until Document Warnings Are Reviewed setting.

Prevent Signing Until Document Warnings Are Reviewed Enable this option to require the signer to review document warnings before signing or certifying a document. Specify Always, Never, or When Certifying A Document.



To edit or delete a signature appearance, select it in the Appearance box, and then click Edit or Delete.

See also

"Enable right-to-left languages" on page 54

Customizing signature properties using seed values

Seed values offer additional control to document authors by letting them specify which choices a user can make when signing a document. By applying seed values to signature fields in unsigned PDFs, authors can customize options, automate tasks, and specify signature requirements for items such as certificates and timestamp servers. For more information on this topic, go to Acrobat Developer Center and search for the *Acrobat 8.0 Security User Guide*.

Add a timestamp to signatures

You can include the date and time you signed the document as part of your signature. Like signatures, timestamps are easier to verify when they're associated with a timestamp authority's trusted certificate. Including a timestamp helps to prove that the document wasn't changed after you signed it and reduces the chances of an invalid signature. You can obtain a timestamp from a third-party timestamp authority or from the certificate authority that issued your digital ID.

Timestamps appear in the signature field and in the Signature Properties dialog box. If a timestamp server is configured, that timestamp appears in the Date/Time tab of the Signature Properties dialog box. If no timestamp server is configured, the signatures field displays the local time of the computer at the moment of signing.

Configure a timestamp server

To configure a timestamp server, you need the server name and URL or a Forms Data Format (FDF) file that contains the server settings.

1. Choose Advanced > Security Settings.
2. Select Time Stamp Servers on the left.
3. Do one of the following:

- If you have an FDF file with the timestamp server settings, click the Import button . Select the FDF file, and click Open.
- If you have a URL for the timestamp server, click the New button . Type a name and then type the server URL. Specify whether the server requires a user name and password, and then click OK.

Set a timestamp server as the default

If you have two or more timestamp servers configured, you can set one of them as the default.

Note: *Before you set a timestamp server as the default, you may want to check if the timestamp authorities charge a usage fee.*

1. Choose Advanced > Security Settings.
2. Select the timestamp server, and click the Set Default button .
3. Click OK to confirm your selection.

About graphics tablet signatures

You can sign PDFs using graphics tablets and other input devices by using third-party software. Digital signature providers, such as Silanis and the Communication Intelligence Corporation (CIC), provide this capability in an Acrobat supported plug-in. These plug-ins may limit your access of certain encryption features in Acrobat. For more information about third-party providers, visit the Adobe website.

Signing PDFs

Before you sign a PDF

You can expedite the signing process and optimize your results by making the following preparations in advance:

- Obtain a digital ID, or create a self-signed digital ID in Acrobat.

Note: *You cannot create self-signed digital IDs from within FIPS mode.*

- Set the default signing method.
- Create an appearance for your digital signature.
- Use Preview Document mode to suppress any dynamic content that may alter the appearance of the document and mislead you into signing something you shouldn't.

- Review all the pages in a document before you sign. Documents may contain signature fields on multiple pages. When you sign one field, your signature appears in all occurrences of the field, whether you approve those pages or not.

See also

"About digital IDs" on page 253

"Change the signing method" on page 256

Sign a PDF

You can sign a PDF to indicate your approval. A PDF can be signed more than once and by more than one person. When you sign a document, your digital signature appears in the signature field. The appearance of the signature depends on options you choose. The actual information for your digital signature is embedded in the PDF.

The first person to sign a document (typically the document author) has the option of adding a certifying signature, which allows one to restrict changes to the document.



Sign a PDF

For best results, use Preview Document mode to add your signature. See "Sign in Preview Document mode" on page 280.

1 Click the signature field, or do one of the following:

- Choose Advanced > Sign & Certify > Sign Document.
- Click the Sign button in the Tasks toolbar and choose Sign Document or Place Signature.

2 If you chose Place Signature, you're prompted to draw a signature field for your signature.

3 If you haven't specified a digital ID, you're prompted to find or create one.

4 In the Sign Document dialog box, choose the digital ID you want to use. If you defined a personalized signature, choose it from the menu.

5 If you selected advanced digital signature preferences, do any of the following:

- Choose a reason for signing the document.
- Type your location and contact information.
- Review any document warnings about content that may impact signing.

6 If your digital ID requires a password, type it in the Password box.

7 Click Sign, and specify a new name for the document so you can make changes to the original PDF without invalidating the signature, and click Save.

Sign a PDF in a web browser

To sign a PDF on the web, the document must contain an empty signature field. When you sign a document in a browser, only the incremental portion of the file is saved to your hard drive.

1 Click a signature field, and then follow the steps to add your digital signature.

2 To retain a copy of the signed document, click the Save A Copy button in the File toolbar.

Sign in Preview Document mode

For best results, use the Preview Document feature when you sign documents. This feature analyzes the document for content that may alter the document's appearance, and then suppresses that content, allowing you to view and sign the document in a static and secure state.

When you view a PDF in Preview Document mode, a document message bar lets you know if the PDF complies with the PDF/SigQ Level A and Level B specification. Level A indicates that the document contains no dynamic content that can alter its appearance. Level B indicates that the document contains dynamic content that can be suppressed during signing. If the document doesn't comply with Level A or B, you may want to refrain from signing the document and contact the document author about the problem.

You can also use Preview Document mode outside of a signing workflow to check the integrity of a document.

Sign a PDF in Preview Document mode

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Security on the left.

2 Select View Documents In Preview Document Mode When Signing, and click OK.

3 In the PDF, click the signature field, or click the Sign button in the Tasks toolbar and choose Sign Document or Place Signature.

The document message bar appears with the compliance status and options.

4 (Optional) Click View Report in the document message bar (if available) and select each item in the list to show details. When you're done, close the PDF/SigQ Conformance dialog box.

5 If you're satisfied with the compliance status of the document, click Sign Document in the document message bar, and add your digital signature.

6 Save the PDF using a different name than the original, and close the document without making any further changes. If you save the document a second time, your signature must be verified by using the View Signed Version option in the Signatures panel. (See "View previous versions of a signed document" on page 286.)

View a PDF in Preview Document mode

1 Choose Advanced > Sign & Certify > Preview Document.

2 In the document message bar, click View Report (if available) and select each item in the list to show details. When you're done, click Close, and then click Exit.

Before you certify a PDF

Document authors can improve document integrity and ensure that their documents remain certified by addressing the following issues before they certify PDFs:

- Disable or remove content that could modify the document or compromise its integrity, such as JavaScripts, actions, or embedded media.
- If you intend for others to sign the document, enable usage rights to let Adobe Reader users add a digital signature (choose Advanced > Enable Usage Rights In Adobe Reader).
- Certify or sign a PDF only after you make final changes to it. If you make changes or resave the PDF after you sign it, you may compromise the validity of your signature or the document's certified status.

Document authors can use Adobe LiveCycle Designer (Windows) to create signature fields that lock after signing, preventing changes that may invalidate signatures. For more information, see Adobe LiveCycle Designer Help.

See also

"Examine a PDF for hidden content" on page 248

Certify a PDF

When you certify a PDF, you indicate that you approve of its contents. You also specify the types of changes that are permitted for the document to remain certified. For example, suppose that a government agency creates a form with signature fields. When the form is complete, the agency certifies the document, allowing users to change only form fields and sign the document. Users can fill in the form and sign the document, but if they remove pages or add comments, the document doesn't retain its certified status.

You can apply a certifying signature only if the PDF doesn't contain any other signatures. Certifying signatures can be visible or invisible, and are indicated by the blue ribbon icon in the Signatures panel (and if visibly signed, in the signature field). A digital ID is required to add digital signatures (see "About digital signatures" on page 275.)



1 Change the default signing method, if needed.

2 Click the Sign button in the Tasks toolbar and choose one of the following options:

- Certify With Visible Signature.
- Certify Without Visible Signature. If you choose this option, your signature appears only in the Signatures panel.

Note: *If you enabled View Documents In Preview Document Mode When Signing in the Security Preferences, click Sign Document in the document message bar.*

3 Click OK in the Save As Certified Document dialog box.

4 If you're adding a visible signature, draw the signature field on the page. Follow the on-screen instructions to select a digital ID, if prompted.

Specify a default ID to avoid being prompted each time you sign a PDF.

5 In the Certify Document dialog box, specify the permitted changes, type your password, and then click Sign.

6 Save the PDF using a different filename than the original file, and then close the document without making additional changes.

See also

"Change the signing method" on page 256

"Specify the default digital ID" on page 256

"About digital IDs" on page 253

Clear or remove a digital signature

❖ Do one of the following:

- To remove a signature, right-click/Control-click the signature field and choose Clear Signature Field.
- To remove all signatures in a PDF, choose Clear All Signature Fields from the Options menu in the Signatures panel.

If you want to delete the signature field, choose Tools > Advanced Editing > Select Object Tool, select the signature field, and press the Delete key.

Validating signatures

Checking the validity of a signature

By default, signatures are validated when you open a PDF. An icon appears in the signature field on the document page to indicate the signature status. Further details about the status appear in the Signatures panel and in the Signature Properties dialog box.

Third-party signature handlers may provide alternate methods of validating signatures. Check the documentation included with your third-party digital ID.

Important: *To ensure that signatures are validated when you open a PDF and that all verification details appear with the signature, set your verification preferences in advance (see "Set signature verification preferences" on page 284).*

- The digital signature icon along with the name of the field in the Signatures panel indicate the presence of an unsigned signature field.
- The blue ribbon icon indicates that the PDF is certified—that is, it contains a valid certifying signature. (Certifying signatures can be visible or invisible.)
- The check mark icon indicates that the signature is valid.

- The red *x* icon indicates that the signature is invalid.
- The caution triangle icon indicates that the document was modified after the signature was added.
- The question mark icon indicates that the signature couldn't be validated because the signer's certificate isn't in your list of trusted identities.

If the signature status is unknown or unverified, or if the document was modified after it was signed, validate the signature manually to determine the problem's cause and possible solution. If the signature status is invalid (indicated by the red *x* icon), contact the signer about the problem.

See also

"Verify information on a certificate" on page 260

"Get certificates from other users" on page 258

What makes a digital signature invalid?

A signature can have an invalid status for the following reasons:

- The signer's certificate was revoked.
- The signer's certificate has expired.
- The signer's certificate was removed from the trusted identities list or the trust level changed.
- The PDF was modified after it was signed or certified.

Validate a signature manually

You can assess the validity of a digital signature by checking the signature properties.

1 Set your signature verification preferences. For more information, see "Set signature verification preferences" on page 284.

2 Open the PDF containing the signature, and click the Signatures button on the left to open the Signatures panel.

3 Select the signature in the Signatures panel, and then choose Validate Signature from the Options menu. The Signature Validation Status describes the validity of the signature.

4 Click Signature Properties, and do the following:

- If the status is unknown, click the Signer tab, and then click Show Certificate to view the details of the certificate. If you're working with self-signed digital IDs, confirm that the certificate details are valid. If the certificate isn't valid, request a valid certificate from the signer. Click OK.
- Click the Date/Time tab to verify the timestamp, if needed.
- Click the Legal tab to learn more about the legal restrictions of the signature. In the Legal tab, click View Document Integrity Properties to check if the document is PDF/SiqQ-compliant, or if it contains items that could alter its appearance.

If the document was modified after it was signed, check the signed version of the document and compare it to the current version.

See also

"Validate a timestamp certificate" on page 285

"Sign in Preview Document mode" on page 280

"View previous versions of a signed document" on page 286

Set signature verification preferences

Before you open signed documents, set your preferences to optimize Acrobat for validating signatures.

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select Security on the left.

2 To automatically validate all signatures in a PDF when you open the document, select Verify Signatures When The Document Is Opened. This option is enabled by default.

3 Click Advanced Preferences, and then click the Verification tab.

4 Choose the following options:

When Verifying These options specify methods that determine which plug-in to choose when verifying a signature. The appropriate plug-in is often selected automatically. Contact your system administrator about specific plug-in requirements for validating signatures.

Require That Certificate Revocation Checking Be Done Whenever Possible During Signature Verification Select this option to require certificates to be checked against a list of excluded certificates during validation. If this option isn't selected, the revocation status for approval signatures is ignored. The revocation status is always checked for certifying signatures.

Verify Signatures Using Select an option to determine whether the time that appears in the digital signature reflects the time the signature was validated (Current Time), the time set by the default timestamp server specified in the Security Settings, or the time the signature was created.

Hide Signature Field Validity Icon When Signature Is Valid Hides the signature status if the signature is valid, even if the document has changed since it's been signed (indicated by a green check mark and caution triangle icon).

5 Click the Windows Integration tab, and specify whether you can import identities from the Windows Certificates feature into the list of trusted identities. In addition, specify whether to trust all root certificates in the Windows Certificates feature when validating signatures and when validating certified documents. Be aware that selecting these options might compromise security.

Signatures panel overview

The Signatures panel lists all the signatures in the current document. Each signature has an icon identifying its verification status. Verification details are listed beneath each signature and can be viewed by expanding the signature, or by making selections from the Options menu in the Security panel.



Verify signatures in the Signatures panel.

Display the Signatures panel

❖ Choose View > Navigation Panels > Signatures, or click the Signatures button in the navigation pane.

You can right-click/Control-click a signature field in the Signatures panel to do most signature-related tasks, including adding, clearing, and validating signatures. In some cases, however, the signature field may become locked after you sign it.

Expand or collapse a signature

❖ In the Signatures panel, click the plus sign (Windows) or triangle (Mac OS) next to the signature to expand it. Click the minus sign (Windows) or the rotated triangle (Mac OS) to collapse it.

When collapsed, the signature shows only the name, date, and status.

Validate a timestamp certificate

If a signature displays the date and time, that time is the local time on the signer's computer. However, a second date and time may appear in the Signature Properties dialog box, indicating that the signer uses a timestamp server. To validate a signature that contains a timestamp, you must obtain the certificate for the timestamp server and add it to your list of trusted identities. Otherwise, the timestamp appears in the Signatures panel as unverified, and you must validate the timestamp manually.

1 Click the Signatures button in the navigation pane, select the signature, and choose Validate Signature from the Options menu.

2 Click the Signature Properties button in the Signature Validation Status dialog box.

3 In the Signature Properties dialog box, click the Date/Time tab to view the timestamp authority, and then click the Show Certificate button. (This button appears in the Date/Time tab only if the signer used a timestamp server.)

4 In the Certificate Viewer, click the Trust tab to determine if the timestamp certificate is trusted. If it isn't trusted, click Add To Trusted Identities. If a certificate for the timestamp server isn't listed, request one from the signer.

See also

"Sharing and managing certificates" on page 258

View previous versions of a signed document

Each time a document is signed, a signed version of the PDF is saved with the PDF. Each version is saved as append-only so that it cannot be modified. All signatures and their corresponding versions can be accessed from the Signatures panel.

1 In the Signatures panel, select the signature, and choose View Signed Version from the Option menu.

The previous version opens in a new PDF, with the version information and the name of the signer in the title bar.

2 To return to the original document, choose the document name from the Window menu.

Compare versions of a signed document

After a document is signed, you can display a list of the changes made to the document after the last version.

1 In the Signatures panel, select the signature.

2 Choose Compare Signed Version To Current Version from the Option menu.

3 When you're done, close the temporary document.

Chapter 10: Accessibility, tags, and reflow

Accessibility features assist people with disabilities—such as mobility impairments, blindness, and low vision—in their use of Adobe Acrobat and Adobe PDFs.

Accessibility features

About accessibility features

A document or application is *accessible* if it can be used by people with disabilities—such as mobility impairments, blindness, and low vision—and not just by people who can see well and use a mouse. Accessibility features in Adobe Acrobat, Adobe Reader, and Adobe Portable Document Format (PDF) make it easier for people with disabilities to use PDF documents and forms, with or without the aid of assistive software and devices such as screen readers, screen magnifiers, and braille printers.

Making PDFs accessible tends to benefit all users. For example, the underlying document structure that makes it possible for a screen reader to properly read a PDF out loud also makes it possible for a mobile device to correctly reflow and display the document on a small screen. Similarly, the preset tab order of an accessible PDF form helps all users—not just users with mobility impairments—fill the form more easily.

Accessibility features in Acrobat and Reader fall into two broad categories: features to make the reading of PDF documents more accessible and features to create accessible PDF documents. To create accessible PDF documents, you must use Acrobat, not Reader.

Features for accessible reading of PDFs

- Preferences and commands to optimize output for assistive software and devices, such as saving as accessible text for a braille printer
- Preferences and commands to make navigation of PDFs more accessible, such as automatic scrolling and opening PDFs to the last page read
- Accessibility Setup Assistant for easy setting of most preferences related to accessibility
- Keyboard alternates to mouse actions
- Reflow capability to temporarily present the text of a PDF in a single easy-to-read column
- Read Out Loud text-to-speech conversion
- Support for screen readers and screen magnifiers

Features for creating accessible PDFs

- Creation of tagged PDFs from authoring applications
- Conversion of untagged PDFs to tagged PDFs
- Security setting that allows screen readers to access text while preventing users from copying, printing, editing, and extracting text
- Ability to add text to scanned pages to improve accessibility
- Tools for editing reading order and document structure

- Tools for creating accessible PDF forms

Though Acrobat Standard provides some functionality for making existing PDFs accessible, you must use Acrobat Professional or Acrobat 3D to perform certain tasks—such as editing reading order or editing document structure tags—that may be necessary to make some PDF documents and forms accessible.

For more information about creating accessible PDFs and using accessibility features to read PDFs, see http://www.adobe.com/go/accessibility.

About accessible PDFs

Accessible PDFs have the following characteristics.

Searchable text

A document that consists of scanned images of text is inherently inaccessible because the content of the document is images, not searchable text. Assistive software cannot read or extract the words, users cannot select or edit the text, and you cannot manipulate the PDF for accessibility. You must convert the scanned images of text to searchable text using optical character recognition (OCR) before you can use other accessibility features with the document.

Alternate text descriptions

Document features such as images and interactive form fields can't be read by a screen reader unless they have associated alternate text. Though web links are read by screen readers, you can provide more meaningful descriptions as alternate text. Alternate text and tool tips can aid many users, including those with learning disabilities.

Fonts that allow characters to be extracted to text

The fonts in an accessible PDF must contain enough information for Acrobat to correctly extract all of the characters to text for purposes other than displaying text on the screen. Acrobat extracts characters to Unicode text when you read a PDF with a screen reader or the Read Out Loud feature, or when you save as text for a braille printer. This extraction fails if Acrobat cannot determine how to map the font to Unicode characters.

Reading order and document structure tags

To read a document's text and present it in a way that makes sense to the user, a screen reader or other text-to-speech tool requires that the document be structured. Document structure tags in a PDF define the reading order and identify headings, paragraphs, sections, tables, and other page elements.

Interactive form fields

Some PDFs contain forms that a person is to fill out using a computer. To be accessible, form fields must be interactive—meaning that a user must be able to enter values into the form fields.

Navigational aids

Navigational aids in a PDF—such as links, bookmarks, headings, a table of contents, and a preset tab order for form fields—assist all users in using the document without having to read through the entire document, word by word. Bookmarks are especially useful and can be created from document headings.

Document language

Specifying the document language in a PDF enables some screen readers to switch to the appropriate language.

Security that doesn't interfere with assistive software

Some authors of PDFs restrict users from printing, copying, extracting, adding comments to, or editing text. The text of an accessible PDF must be available to a screen reader. You can use Acrobat to ensure that security settings don't interfere with a screen reader's ability to convert the on-screen text to speech.

See also

"Recognize text in scanned documents" on page 67

"Check and correct reading order" on page 307

"Workflow for creating accessible PDF forms" on page 304

"Add alternate text and supplementary information to tags" on page 317

"Set the document language" on page 313

"Prevent security settings from interfering with screen readers" on page 313

"Check accessibility with Full Check" on page 291

About tags, accessibility, reading order, and reflow

PDF tags are similar in many ways to XML tags. PDF tags indicate document structure: which text is a heading, which content makes up a section, which text is a bookmark, and so on. A logical structure tree of tags represents the organizational structure of the document. Thus tags can indicate the precise reading order and improve navigation—particularly for longer, more complex documents—without changing the appearance of the PDF.

For people who are unable to see or interpret the visual appearance of a document, assistive software can determine how to present and interpret the content of the document by using the logical structure tree. Most assistive software depends on document structure tags to determine the appropriate reading order of text and to convey the meaning of images and other content in an alternate format, such as sound. In an untagged document, there is no such structure information, and Acrobat must infer a structure based on the Reading Order preference setting, which often results in page items being read in the wrong order or not at all.

Reflowing a document for viewing on the small screen of a mobile device relies on these same document structure tags.

Often, Acrobat tags PDFs when you create them. To determine whether a PDF contains tags, choose File > Properties, and look at the Tagged PDF value in the Advanced pane of the Description tab.

The logical structure tree appears on the Tags tab and shows document content as page elements nested at various levels.

See also

"Reading PDFs with reflow and accessibility features" on page 293

"Creating accessible PDFs" on page 299

"Making existing PDFs accessible" on page 305

"Standard PDF tags" on page 319

Checking the accessibility of PDFs

About accessibility checkers

Of course, the best way to test the accessibility of a document is to attempt to use the document with the tools that your readers will use. However, even if you don't have a screen reader or braille printer, you can still use any of several methods provided by Acrobat for checking the accessibility of a PDF.

- Use Quick Check to check for document structure tags, searchable text, and appropriate security settings for accessibility. This method is often the best way to check for accessibility before attempting to use a PDF.
- Use Full Check to perform a more thorough check for many characteristics of accessible PDFs, such as the use of fonts that can be mapped reliably to Unicode text.
- Use Reflow view to quickly check reading order.
- Use Read Out Loud to experience the document as it will be experienced by readers who use this text-to-speech conversion tool.
- Save the document as accessible text and then read the saved text file in a word-processing application to experience the document as it will be experienced by readers who use a braille printer.
- Use the TouchUp Reading Order tool, Tags tab, and Content tab to examine the structure, reading order, and contents of a PDF in detail.

Note: *The accessibility checker tools can help to identify areas of documents that may be in conflict with the Adobe interpretation of the accessibility guidelines referenced in the application and its documentation. However, these tools don't check documents against all accessibility criteria, including those in such referenced guidelines, and Adobe doesn't warrant that documents comply with any specific guidelines or regulations.*

See also

"Reading a PDF with a screen reader" on page 298

"Reflow a PDF" on page 297

"Read a PDF with Read Out Loud" on page 298

"Save as accessible text for a braille printer" on page 297

"Check and correct reading order" on page 307

"View tags in the Tags tab" on page 315

Check accessibility with Quick Check

Use Quick Check to examine a PDF to see if it has searchable text, document structure tags, and appropriate security settings to make it accessible.

❖ Press Shift+Ctrl+6/Shift+Command+6.

If the document is unstructured, a message may appear, suggesting that you change reading order preferences.

See also

"Setting accessibility preferences" on page 293

Accessibility Quick Check results

"This document has logical structure but it is not a Tagged PDF. Some accessibility information may be missing." Quick Check has found an underlying document structure in the document, so Acrobat will use the available document structure to control the reading order, rather than analyzing the document itself. However, this untagged document structure might be incomplete or unreliable, so assistive software and the accessibility features in Acrobat (such as the Read Out Loud and the Save As Text features) may not read the page properly. If the reading order of the page seems to be wrong, select Override The Reading Order In Tagged Documents in the Reading panel of the Preferences dialog box.

"This document is not structured, so the reading order may not be correct. Try different reading orders using the Reading Preferences panel." Quick Check has found no underlying document structure that Acrobat can use for reading order. Acrobat will analyze the reading order of the document using the current analysis method set in the Reading Order preference, but this PDF might not be read correctly by screen readers. If the reading order seems wrong, select a different option for Reading Order in the Reading panel of the Preferences dialog box.

"No accessibility problems were detected in this quick check. Choose the Full Check command to check more thoroughly." Quick Check has found that the PDF contains searchable text, is tagged, has an underlying document structure, and has no security settings that prohibit access for screen readers. To check for other types of accessibility problems that may be present in the PDF, use Full Check.

"This document's security settings prevent access by screen readers." Quick Check has found that the PDF has security settings that interfere with screen readers' ability to extract text for conversion to speech. You may be able to use a screen reader with this document if your assistive technology product is registered with Adobe as a Trusted Agent. Contact your assistive technology product vendor.

"This document appears to contain no text. It may be a scanned image." Quick Check has found that the PDF contains no searchable text, probably because the document consists entirely of one or more scanned images. This means that screen readers, Read Out Loud, Reflow view, and most other accessibility features—which rely on text as input—will not work with this document.

Check accessibility with Full Check

Use Full Check to check a PDF for many of the characteristics of accessible PDFs.

You can choose which kinds of accessibility problems to look for and how you want to view the results.

1 Choose Advanced > Accessibility > Full Check.

2 Select options for how you want to view the results, the page range to check, and which types of accessibility problems to check for.

3 Click Start Checking.

Note: *A full accessibility check can be time-consuming. You can stop the process by pressing the Esc key. Consider choosing a smaller page range.*

You can choose to view the results of a full accessibility check as an HTML file or as comments that are placed throughout the document where the accessibility problems are detected.

Because the Full Check feature is unable to distinguish between essential and nonessential content types, it may report issues that don't affect readability. It's a good idea to review all issues to determine which ones require correction.

Accessibility Full Check options

Create Accessibility Report Creates an HTML report of accessibility issues, which is opened in the navigation pane and saved in the location indicated by the Folder field.

Include Repair Hints In Accessibility Report Adds suggestions for fixing accessibility problems to the HTML report or comments.

Create Comments In Document Adds comments to the document that indicate accessibility problems.

Delete all accessibility comments from the PDF after you repair the accessibility issues.

Page Range The range of pages to check.

Name The set of accessibility criteria to check. For the Section 508 and W3C guidelines, the options area includes a Browse button that links to the website for the respective guidelines. Select Adobe PDF to choose from options for the Adobe PDF accessibility standard:

- **Alternative Descriptions Are Provided** Checks for tagged figures that are missing alternate text.
- **Text Language Is Specified** Checks for paragraphs that don't have a language specified for them. Setting the language for an entire document in the Document Properties dialog box corrects all errors related to this option.
- **Reliable Character Encoding Is Provided** Checks for fonts that are inaccessible to screen readers and other assistive software. Fonts must contain enough information for Acrobat to correctly extract all the characters to text. If one or more fonts don't allow for the correct extraction of all the characters, the PDF is inaccessible.
- **All Content Is Contained In The Document Structure** Checks for page elements that may have been overlooked during tagging. Adding these elements to the tag tree (if necessary) ensures that a screen reader can present the content to a user.
- **All Form Fields Have Descriptions** Checks for form fields that are missing descriptions.
- **Tab Order Is Consistent With The Structure Order** Checks whether tags properly reflect the document's structure.
- **List And Table Structure Is Correct** Checks whether tags that have been generated for lists and tables meet the requirements of tagged PDF.

View Full Check results

If you choose Create Accessibility Report in the Accessibility Full Check dialog box, you can specify a folder where you want the report to be saved. When the full check is complete, the accessibility report appears in the navigation pane and is also saved in the folder indicated. The name of the report file is the same as that of the source PDF, except that .pdf is replaced by PDF.html.

1. Choose Advanced > Accessibility > Open Accessibility Report.
2. Select the HTML file, and then click OK. The report appears in the navigation pane.

Links in the accessibility report take you to the location of inaccessible elements in the document pane or to procedures that briefly explain how to fix accessibility problems.

Note: *If you want to reopen the accessibility report with the associated PDF, don't move or rename either file after running the full check. The HTML file refers to the PDF file with a relative path.*

Reading PDFs with reflow and accessibility features

Setting accessibility preferences

Acrobat provides several preferences that help make the reading of PDFs more accessible for visually impaired and motion-impaired users, including preferences that control how PDFs appear on the screen and are read by a screen reader.

Most preferences related to accessibility are available through the Accessibility Setup Assistant, which provides on-screen instructions for setting these preferences. Some preferences that affect accessibility aren't available through the Accessibility Setup Assistant; these include preferences in the Reading, Forms, and Multimedia categories. You can set all preferences in the Preferences dialog box.

The names shown for some preferences in the Accessibility Setup Assistant are different from the names for the same preferences shown in the Preferences dialog box. Acrobat Help uses the names shown in the Preferences dialog box.

For more information about accessibility features in Acrobat and PDF, visit the accessibility page of the Adobe website.

Set accessibility preferences with the Accessibility Setup Assistant

1 Start the Accessibility Setup Assistant by doing one of the following:

- Choose Advanced > Accessibility > Setup Assistant.
- (Windows only) Start Acrobat for the first time while a screen reader or screen magnifier is running.

2 Choose the option that is appropriate for your assistive software and devices.

The assistant presents only preferences that are appropriate for your assistive software and devices, according to the option that you choose.

3 Follow the on-screen instructions. If you click Cancel at any point, Acrobat uses default settings for the preferences set by the assistant (not recommended).

Set accessibility preferences with the Preferences dialog box

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

2 Set preferences as appropriate for your assistive software and devices in various panels of the Preferences dialog box.

Accessibility preferences

Accessibility preferences in Accessibility panel

Replace Document Colors When this preference is selected, you can choose from a list of contrasting color combinations for text and background, or you can create your own. These settings correspond to the Use High Contrast Colors For Document Text option in the Accessibility Setup Assistant.

Always Use Page Layout Style Corresponds to the Override Page Layout Style option in the Accessibility Setup Assistant.

Always Use Zoom Setting Corresponds to the Override Document Zoom option in the Accessibility Setup Assistant.

Use Document Structure For Tab Order When No Explicit Tab Order Is Specified Improves navigation of form fields and links in documents that don't specify a tab order.

Always Display The Keyboard Selection Cursor Select this option if you use a screen magnifier. This preference corresponds to the Always Display The Keyboard Selection Cursor option in the Accessibility Setup Assistant.

Accessibility preferences in Documents panel

Automatically Save Document Changes To Temporary File When deselected, this preference disables the auto-save action. Each time a PDF is saved, the screen reader or magnifier must reload the document. This preference corresponds to the Disable Document Auto-Save option in the Accessibility Setup Assistant.

Accessibility preferences in Forms panel

Fields Highlight Color and Required Fields Highlight Color These preferences specify what colors will be used to highlight fillable form fields. They correspond to the Field Highlight Color and Required Field Highlight Color options in the Accessibility Setup Assistant.

Auto-Complete Enables Acrobat to automatically offer to complete some entries in form fields so that filling form fields requires fewer keystrokes. This preference doesn't correspond to an option in the Accessibility Setup Assistant.

Accessibility preferences in Internet panel

Display PDF In Browser Causes PDFs linked to from web pages to open in the web browser instead of a separate Acrobat window. Deselect this preference for greater control when navigating a document in a screen reader. This preference corresponds to the Display PDF Documents In The Web Browser option in the Accessibility Setup Assistant.

Accessibility preferences in Multimedia panel

- Show Subtitles When Available
- Play Dubbed Audio When Available
- Show Supplemental Text Captions When Available
- Show Audio Description (Or Video Description, Or Descriptive Video) When Available

These preferences don't correspond to any options in the Accessibility Setup Assistant.

Accessibility preferences in Page Display panel

Zoom Sets the on-screen magnification of documents and allows low-vision readers to read reflowed PDFs more easily. This preference corresponds to the Override Document Zoom option in the Accessibility Setup Assistant.

Smooth Text Controls anti-aliasing of text. To disable smoothing of text and make text sharper and easier to read with a screen magnifier, choose None. This preference corresponds to the Disable Text Smoothing option in the Accessibility Setup Assistant.

Accessibility preferences in Reading panel

Reading Order Specifies the reading order of documents. The reading order preferences also appear in the Accessibility Setup Assistant.

- **Infer Reading Order From Document (Recommended)** Interprets the reading order of untagged documents by using an advanced method of structure-inference layout analysis.

- **Left-To-Right, Top-To-Bottom Reading Order** Delivers the text according to its placement on the page, reading from left to right and then top to bottom. This method is faster than Infer Reading Order From Document. This method analyzes text only; form fields are ignored and tables aren't recognized as such.

- **Use Reading Order In Raw Print Stream** Delivers text in the order in which it was recorded in the print stream. This method is faster than Infer Reading Order From Document. This method analyzes text only; form fields are ignored and tables aren't recognized as such.

Override The Reading Order In Tagged Documents Uses the reading order specified in the Reading preferences instead of that specified by the tag structure of the document. Use this preference only when you encounter problems in poorly tagged PDFs. This preference corresponds to the Override The Reading Order In Tagged Documents option in the Accessibility Setup Assistant.

Page Vs Document This preference determines how much of a document is delivered to a screen reader at a time. If a PDF isn't tagged, Acrobat may analyze the document and attempt to infer its structure and reading order, which can take a long time for a long document. You may want to set Acrobat to deliver only the currently visible page so that it analyzes only a small piece of the document at a time. This consideration will vary depending on the size and complexity of the document and on the features of the screen reader. When Acrobat delivers information to a screen reader, screen magnifier, or other assistive software, it loads information into a memory buffer that is directly available to the assistive software. The amount of information that is delivered to the memory buffer can affect how long Acrobat takes to perform tasks, such as opening the document, advancing to the next page, changing views, and carrying out commands.

- **Only Read The Currently Visible Pages** This option is usually best when you use a screen magnifier. It improves performance by eliminating the need for the software to process parts of the document that aren't visible. When Acrobat sends only the currently visible pages of a PDF to the memory buffer, the assistive technology has access to those pages only. It cannot go to another page until the next page is visible and Acrobat has sent the page information to the memory buffer. Therefore, if this option is selected, you must use the navigation features of Acrobat, not those of the assistive technology, to navigate from page to page in the document. You should also set the Default Page Layout option in preferences to Single Page if you choose to have Acrobat send only the currently visible pages to the assistive technology. Because Acrobat sends page information about all visible pages, the assistive technology receives information about pages that may be only partially visible (such as the bottom of one page or the top of the next), as well as those pages that are completely visible. If you use a page display setting other than Single Page, such as Continuous, and then you display the next page, the technology may not correctly track which portion of a previous page it has already read aloud. For instructions on setting the default page layout to Single Page, see "Preferences for viewing PDFs" on page 33.

This option corresponds to the Only Read The Currently Visible Pages option in the Accessibility Setup Assistant.

- **Read The Entire Document** This option can be best if you use a screen reader that has its own navigation and search tools and that is more familiar to you than the tools in Acrobat. This option corresponds to the Read The Entire Document At Once option in the Accessibility Setup Assistant.

- **For Large Documents, Only Read The Currently Visible Pages** This option is selected by default and is usually best if you use a screen reader with long or complex PDFs. It allows Acrobat to deliver an entire small document but revert to page-by-page delivery for large documents. This preference corresponds to the For Large Documents, Only Read The Currently Visible Pages option in the Accessibility Setup Assistant.

Confirm Before Tagging Documents When selected, lets the user confirm the options that will be used before Acrobat prepares an untagged document for reading. Tagging can be a time-consuming procedure, especially for larger documents. This preference corresponds to the Confirm Before Tagging Documents option in the Accessibility Setup Assistant.

Read Out Loud Options Set preferences in this section to control volume, speed, and pitch of the voice used for Read Out Loud. You can choose to use the default voice or any of the voices provided by your operating system. Select Read Form Fields to have Read Out Loud read the contents of form fields. These preferences don't correspond to options in the Accessibility Setup Assistant.

Navigate and control the application with the keyboard

You can navigate by using the keyboard instead of the mouse. Several keyboard access features are available on Mac OS; see the documentation for your operating system for details. On Windows, some of the keyboard shortcuts used to navigate in Acrobat may differ from those used in other Windows applications.

When you open Acrobat within a web browser, keyboard commands are mapped to the web browser first. Consequently, some keyboard shortcuts may not be available for Acrobat or may be available only after you shift the focus to the PDF.

For information on accessibility features for navigating Acrobat and PDF documents with the keyboard, visit the accessibility page of the Adobe website.

See also

"Keys for navigating a PDF" on page 556

"Keys for selecting tools" on page 554

"Keys for editing" on page 555

"Keys for general navigating" on page 557

"Keys for working with navigation panels" on page 558

"Keys for navigating the Help window" on page 559

"Keys for navigating the How To panel" on page 559

Enable single-key accelerators

You can select some tools and perform some actions with single-key accelerators. Most keyboard shortcuts in Acrobat don't require that you enable single-key accelerators.

1 Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

2 Select General, and then select Use Single-Key Accelerators To Access Tools.

Note: *Some screen readers do not work with Acrobat single-key accelerators.*

Scroll automatically

The automatic scrolling feature makes it easier to scan through long PDFs, especially reflowed documents. You can scroll through pages without using keystrokes or mouse actions.

1 Choose View > Automatically Scroll.

2 Do any of the following:

- To change the scrolling speed to a specific speed, press a number key (9 for fastest, 0 for slowest).
- To increase or decrease the scrolling speed, press the Up Arrow or Down Arrow key, depending on the direction of scrolling.
- To reverse the direction of scrolling, press the minus sign (-) key.
- To jump to the next or previous page, press the Left Arrow or Right Arrow key.



To stop automatic scrolling, press Esc or choose View > Automatically Scroll again.

Save as accessible text for a braille printer

Note: *This document uses the term "braille printer" to refer to any device that is used to convert accessible text to a form that can be used by a person with blindness or low vision.*

You can save a PDF as accessible text to print on a braille printer. Accessible text can be imported and printed out as formatted grade 1 or 2 braille documents by using a braille translation application. See the documentation included with the braille translator for more information.

A text version of a PDF contains no images or multimedia objects, although the text version of an accessible PDF contains alternate text descriptions for such objects.

1 Choose File > Save As.

2 Choose Text (Accessible) from the Save As Type (Windows) or Format (Mac OS) menu.

Reflow a PDF

You can reflow a PDF to temporarily present it as a single column that is the width of the document pane. This reflow view can make the document easier to read on the small screen of a mobile device or on a standard monitor at a large magnification, without the need to scroll horizontally to read each line of text.

You cannot save, edit, or print a document while it is in Reflow view.

In most cases, only readable text appears in the reflow view. Text that doesn't reflow includes forms, comments, digital signature fields, and page artifacts, such as page numbers, headers, and footers. Pages that contain both readable text and form or digital signature fields don't reflow. Vertical text reflows horizontally.

Acrobat temporarily tags an untagged document before reflowing it. As an author, you can optimize your PDFs for reflow by tagging them yourself. Tagging ensures that text blocks reflow and that content follows the appropriate sequences, so readers can follow a story that spans different pages and columns without other stories interrupting the flow.

A quick way to check the reading order of a document is to view it in Reflow view.

If the tagged PDF doesn't reflow the way you want, the content order or reading order of the PDF file may contain inconsistencies, or the tagging process itself may be the cause. You can use the Content tab or TouchUp Reading Order tool to resolve reflow problems.

If the problem is simply that words don't hyphenate the way you expect them to, then you can insert special characters to resolve the problem. (See "Insert special characters" on page 350.)



Headings and columns (left) reflow in a logical reading order (right).

Reflow a tagged PDF

❖ Do one of the following:

- Choose View > Zoom > Reflow.
- Press Ctrl+4/Command+4.

If the Page Display setting for the document is Two-Up before you choose Reflow view, the Page Display setting automatically becomes Single Page when the document is reflowed. If the Page Display setting for the document is Two-Up Continuous before you choose Reflow view, the Page Display setting automatically becomes Continuous when the document is reflowed.

Return to unreflowed view

❖ When in Reflow view, do one of the following:

- Choose View > Zoom > Reflow.
- Press Ctrl+4/Command+4.

Reading a PDF with a screen reader

Acrobat supports assistive software and devices—such as screen readers and screen magnifiers—that enable visually impaired users to interact with computer applications. When assistive software and devices are in use, Acrobat may add temporary tags to open PDFs to improve their readability. Use the Accessibility Setup Assistant to improve how Acrobat interacts with the types of assistive software and devices that you use. When using a screen reader, you can change your reading settings for the current document by pressing Shift+Ctrl+5 (Windows) or Shift+Command+5 (Mac OS).

See the documentation for your assistive software or device, or contact the vendor for more information about system requirements, compatibility requirements, and instructions for using this software or device with Acrobat.

Read a PDF with Read Out Loud

The Read Out Loud feature reads aloud the text in a PDF, including the text in comments and alternate text descriptions for images and fillable fields. In tagged PDFs, content is read in the order in which it appears in the document's logical structure tree. In untagged documents, the reading order is inferred, unless a reading order has been specified in the Reading preferences.

Read Out Loud uses the available voices installed on your system. If you have SAPI 4 or SAPI 5 voices installed from text-to-speech or language applications, you can choose them to read your PDFs.

Note: *Read Out Loud isn't a screen reader, and some operating systems may not support it.*

Activate or deactivate Read Out Loud

You must activate Read Out Loud before you can use it. You can deactivate Read Out Loud to free system resources and improve performance of other operations.

❖ Do one of the following:

- Choose View > Read Out Loud > Activate Read Out Loud or press Shift+Ctrl+Y/Shift+Command+Y.
- Choose View > Read Out Loud > Deactivate Read Out Loud or press Shift+Ctrl+Y/Shift+Command+Y.

Read a PDF with Read Out Loud

1 Navigate to the page that you want to read.

2 Do one of the following:

- Choose View > Read Out Loud > Read This Page Only or press Shift+Ctrl+V/Shift+Command+V.
- Choose View > Read Out Loud > Read To End Of Document or press Shift+Ctrl+B/Shift+Command+B.

Read PDF form fields out loud

1 In the Reading panel of the Preferences dialog box, select Read Form Fields in the Read Out Loud Options section.

2 In the PDF form, press Tab to select the first form field.

3 Make entries and selections as needed, and then press Tab to move to the next field, repeating this step until the form is completed. Acrobat reads the state of selected check boxes and radio buttons.

Interrupt reading out loud

❖ Do one of the following:

- Choose View > Read Out Loud > Pause or press Shift+Ctrl+C/Shift+Command+C.
- Choose View > Read Out Loud > Stop or press Shift+Ctrl+E/Shift+Command+E.

About operating system accessibility tools

Accessibility tools in Windows

Windows 2000, XP, and Vista operating systems have built-in tools that provide increased or alternate access to information on the computer screen. Narrator is a light version of a screen reader. Magnifier is a screen magnification tool.

For more information on the accessibility tools in the Windows 2000, XP, or Vista operating systems, visit the Microsoft accessibility website at http://www.microsoft.com/enable.

Accessibility tools in Mac OS

Mac OS X has built-in tools that provide increased or alternate access to information on the computer screen.

For more information on the accessibility tools in the Mac OS X operating system, visit the Apple Computer, Inc. accessibility website at http://www.apple.com/accessibility.

Creating accessible PDFs

Workflow for creating accessible PDFs

At a high level, the process of creating accessible PDFs consists of a few basic stages:

1. **Consider accessibility before you convert a document to PDF.**

2. **Add fillable form fields and descriptions, and set the tab order.**

3. **Tag the PDF.**

4. **Add other accessibility features to the PDF.**

5. **Evaluate the PDF and repair tagging problems.**

Though these stages are presented in an order that suits most needs, you may perform tasks in these stages in a different order or iterate between some of the stages. In all cases, you should first examine the document, determine its intended purpose, and use that analysis to determine the workflow that you apply.

6. **Consider accessibility before you convert a document to PDF.**

Whenever possible, think about accessibility when you create the source files in an authoring application, such as a word-processing or page-layout application.

Typical tasks to do in the authoring application include adding alternate text to graphics, optimizing tables, and applying paragraph styles or other document-structure features that can be converted to tags. For more information, see "Creating a tagged PDF from an authoring application" on page 302.

Note: *If you intend to design PDF forms, Adobe recommends using Adobe LiveCycle Designer, which is dedicated to the design of interactive and static forms. LiveCycle Designer adds structure tags to forms, improving accessibility.*

7. **Add fillable form fields and descriptions, and set the tab order.**

If your document includes form fields, you must make form fields interactive (fillable) and include descriptions for the form fields. Use Forms > Run Form Fields Recognition to automatically detect form fields and make them fillable. For more information on detecting form fields and making them fillable, see "Creating new forms" on page 212.

Acrobat Professional and Acrobat 3D have a Forms toolbar that provides numerous tools for creating fillable form fields, such as buttons, check boxes, list boxes, and text boxes. When you create a field, you can type a description for it in the Tooltip box in the General tab of the field's Properties dialog box. Screen readers will read this text aloud to the user. You can also use the TouchUp Reading Order tool to add descriptions to form fields.

For information on setting the tab order to use document structure, see "Set form-field tabbing order in Acrobat" on page 221.

8. **Tag the PDF.**

Improve the accessibility of PDFs by adding tags in Acrobat. If a PDF doesn't contain tags, Acrobat may attempt to tag it automatically when users read or reflow it, and the results may be disappointing. If you provide users with a tagged PDF, the logical structure tree sends the contents to a screen reader or other assistive software or hardware in an appropriate order.

For best results, tag a document when converting it to PDF from an authoring application. Alternatively, you can tag a PDF any time in Acrobat.

Tagging during conversion to PDF requires an authoring application that supports tagging in PDF. Tagging during conversion enables the authoring application to draw from the source document's paragraph styles or other structural information to produce a logical structure tree that reflects an accurate reading order and appropriate levels of tags. This tagging can more readily interpret the structure of complex layouts, such as embedded sidebars, closely spaced columns, irregular text alignment, and tables. Tagging during conversion can also properly tag the links, cross-references, bookmarks, and alternate text (when available) that are in the file.

To tag a PDF in Acrobat, use the Add Tags To Document command. This command works on any untagged PDF, such as one created with Adobe PDF Printer. Acrobat analyzes the content of the PDF to interpret the individual page elements, their hierarchical structure, and the intended reading order of each page, and then builds a tag tree that reflects that information. It also creates tags for any links, cross-references, and bookmarks that you added to the document in Acrobat.

Though the Add Tags To Document command adequately tags most standard layouts, it cannot always correctly interpret the structure and reading order of complex page elements, such as closely spaced columns, irregular text alignment, nonfillable form fields, and tables that don't have borders. Tagging these pages by using the Add Tags To Document command can result in improperly combined elements or out-of-sequence tags that cause reading order problems in the PDF.

For more information, see "Add tags to an existing PDF" on page 305.

9. Add other accessibility features to the PDF.

This stage includes setting the document language, making sure that security settings don't interfere with screen readers, creating accessible links, and adding bookmarks. For more information, see "Set the document language" on page 313, "Prevent security settings from interfering with screen readers" on page 313, "Add accessible links" on page 312, and "About bookmarks" on page 327.

10. Evaluate the PDF and repair tagging problems.

Once you have a tagged PDF, you must evaluate the document for reading order problems, tagging errors, and accessibility errors, and then repair them as needed.

No matter which method you use to tag the PDF, you'll probably need to use Acrobat to touch up the tagging and reading order for complex page layouts or unusual page elements. For example, the Add Tags To Document command can't always distinguish between instructive figures and decorative page elements such as borders, lines, or background elements. It may incorrectly tag all of these as figures. Similarly, the Add Tags To Document command may erroneously tag graphical characters within text—such as drop caps—as figures instead of including them in the tag that represents the rest of the text block. Such errors can clutter the tag tree and complicate the reading order that assistive technology relies on.

If you tag a document from within Acrobat, the application generates an error report after it completes the tagging process. You can use this report to guide you as you repair tagging problems. You can identify other tagging, reading order, and accessibility problems for any PDF in Acrobat by using the Full Check tool or the TouchUp Reading Order tool. For more information, see "Check accessibility with Full Check" on page 291 and "Check and correct reading order" on page 307.

Create a tagged PDF from a web page

A PDF that you create from a web page is only as accessible as the HTML source that it is based on. For example, if the web page relies on tables for its layout design (as many web pages do), the HTML code for the table may not flow in the same logical reading order as a tagged PDF would require, even though the HTML code is sufficiently structured to display all the elements correctly in a browser.

Depending on the complexity of the web page, you may need to do extensive repairs by using the TouchUp Reading Order tool or editing the tag tree in Acrobat.

To produce the most accessible PDFs from web pages you create, first establish a logical reading order in their HTML code. For best results, employ the Web Content Accessibility Guidelines that are published by the World Wide Web Consortium (W3C). The guidelines are available on the W3C website at www.w3.org.

1. Choose File > Create PDF > From Web Page.
2. For URL, type the address of the web page, or navigate to the web page location.
3. Click Settings.
4. In the General tab, select Create PDF Tags, and then click OK.
5. Select any other options as appropriate, and then click Create.

Creating a tagged PDF from an authoring application

In most cases, you create tagged PDFs from within an authoring application, such as Adobe FrameMaker®, Adobe InDesign, or Microsoft Word. Creating tags in the authoring application generally provides better results than adding tags in Acrobat.

PDFMaker provides conversion settings that let you create tagged PDFs in Microsoft Excel, PowerPoint, and Word.

For an in-depth guide to creating accessible PDFs, visit the accessibility page of the Adobe website.

For more information, see the documentation for your authoring application.

About tags in combined PDFs

You can combine multiple files from different applications in one operation to create a single PDF. For example, you can combine word-processing files with slide presentations, spreadsheets, and web pages.

During conversion, Acrobat opens each authoring application, creates a tagged PDF, and assembles these PDFs into a single tagged PDF.

The conversion process doesn't always correctly interpret the document structure for the combined PDF, because the files being assembled often use different formats. Because you may need to modify the reading order and tag tree of the combined document, you may need to use Acrobat Professional or Acrobat 3D to create an accessible PDF from multiple documents.

When you combine multiple PDFs into one tagged PDF, start with all untagged PDFs or all tagged PDFs. Combining tagged and untagged PDFs results in a partially tagged PDF that isn't accessible to people with disabilities; some users—such as those using screen readers—will be completely unaware of the pages that don't have tags. If you start with a mix of tagged and untagged PDFs, tag the untagged files before proceeding. If the PDFs are all untagged, add tags to the combined PDF after you finish inserting, replacing, and deleting pages.

Keep in mind that when you insert, replace, or delete pages, Acrobat accepts existing tags into the tag tree of the consolidated PDF in the following manner:

- When you insert pages into a PDF, Acrobat adds the tags (if any) for the new pages to the end of the tag tree, even if you insert the new pages at the beginning or the middle of the document.
- When you replace pages in a PDF, Acrobat adds the tags (if any) from the incoming pages to the end of the tag tree, even if you replace pages at the beginning or the middle of the document. Acrobat retains the tags (if any) for the replaced pages.

- When you delete pages from a PDF, Acrobat retains the tags (if any) of the deleted pages.

Pages whose tags are out of order in the logical structure tree can cause problems for screen readers. Screen readers read tags in sequence down the tree, and therefore they might not reach the tags for an inserted page until the end of the tree. To fix this problem, you'd use Acrobat Professional or Acrobat 3D to rearrange the tag tree to put large groups of tags in the same reading order as the pages themselves. To avoid the need for this advanced step, plan so that you always insert pages to the end of a PDF, building the document from front to back in sequence. For example, if you create a title page PDF separately from the PDF that contains the body of the text, add the body PDF to the title page PDF, even though the body document is much larger to process. This approach puts the tags for the body of the text after the tags for the title page, and eliminates the need for you to rearrange the tags later in Acrobat Professional or Acrobat 3D.

The tags that remain from a deleted or replaced page don't connect to any content in the document. Essentially, they are large pieces of empty tag tree sections. These unneeded tags increase the file size of the document, slow down screen readers, and can make screen readers present confusing results. You should use Acrobat Professional or Acrobat 3D to delete the tags of deleted pages from the tag tree.

For more information, see "Create merged PDFs and PDF packages" on page 121.

About tools for creating accessible PDF forms

Adobe offers several tools for the creation of accessible PDF forms:

Acrobat Professional or Acrobat 3D Use either application to open untagged or tagged PDF forms (except PDF forms that are created from LiveCycle Designer) to add fillable form fields, such as text boxes, check boxes, and buttons. Then use the application's other tools to make the form accessible by adding descriptions to form fields, tagging untagged forms, setting the set tab order, manipulating tags, and performing the other PDF accessibility tasks.

Adobe PDF Forms Access Use this tool to open and tag untagged PDF forms that you created by using Acrobat Professional or Acrobat 3D, and to manipulate the tags of these forms. You can then open the tagged PDF in Acrobat Professional or Acrobat 3D and perform other accessibility tasks. If you often process complex untagged PDF forms, consider purchasing Adobe PDF Forms Access. Its tagging feature is optimized for interpreting forms content, and its tags editor is much easier to use than the tags editor in Acrobat Professional or Acrobat 3D for correcting tagging problems in forms.

LiveCycle Designer (Available in Acrobat Professional and Acrobat 3D) Use this product to design and build new forms or to import untagged PDF forms and make their form fields fillable and accessible. You can deploy forms in tagged PDF, XML, and other formats from LiveCycle Designer. Once you create or edit an Acrobat form in LiveCycle Designer, it becomes a LiveCycle Designer file—it is no longer a PDF that you can edit or manipulate in Acrobat. Both Acrobat and Reader can open and read PDF forms that you create from LiveCycle Designer. These PDF forms, however, don't include permissions to modify the file. You should therefore use LiveCycle Designer only for PDFs that are intended to contain only form-based information. Don't use it to add form fields to a document that combines pages of narrative with an occasional page that has form fields. In this case, you should use Acrobat Professional or Acrobat 3D to add the form fields and then complete the accessibility tasks for the rest of the document's content.

Authoring applications Most authoring applications that you can use to design forms don't retain their fillable form fields when you convert the files to PDF. You therefore need to use the forms tools in Acrobat Professional or Acrobat 3D to add fillable form fields. Moreover, if you tag the form during conversion to PDF, the authoring application may generate inappropriate tags for the text labels of the form fields. In a complex form, for instance, the text labels for all the fields may run together into a single line that screen readers can't interpret as individual labels. Such reading order problems can require time-consuming work in Acrobat Professional or Acrobat 3D to split the labels apart. In

this case, producing an untagged PDF form from the authoring application is sometimes the better course. You can then use the Forms tools in Acrobat Professional or Acrobat 3D to add fillable form fields before you tag the entire document. Some forms, however, are straightforward enough that you can produce a tagged PDF from the authoring application and do only light touchup in Acrobat Professional or Acrobat 3D after you add the fillable form fields.

Workflow for creating accessible PDF forms

Using Acrobat, you can open untagged and tagged PDF forms, add fillable form fields, add descriptions to the fields, set the tab order, add alternate text to form fields, and tag the forms (if they aren't already tagged). You can also edit the tags of any tagged PDF form by using the TouchUp Reading Order tool or the tag tree.

1. Design the form for accessibility.

Forms tend to have relatively complex layouts compared to documents that have a simple, single-column structure. The success that an application has in analyzing and tagging a form depends largely on the original formatting and layout, and on the types of fields that it uses.

When you design a form, include headings, instructions, and fields in which users are to enter data. At a minimum, give each field a label. Also add special instructions for fields that need them. Use graphics tools to draw lines and boxes—don't use characters, such as underscores and vertical bars, because these text characters can confuse screen readers.

Adding descriptions to form fields enables screen readers to identify the fields to users. Users hear the description read aloud when they tab to the field. Write descriptions that are terse but complete. For example, the description "First name" is appropriate for a first-name field. Don't use instructions (such as "Enter first name") as a description.

2. Set and test the tab order of a form.

The tab order for form fields enables people with disabilities to use a keyboard to move from field to field in a logical order. In PDF forms, you should set the tab order to Use Document Structure. You can test a form's tab order by using the following keyboard commands:

- Tab to move focus to the next field
- Shift+Tab to move focus to the previous field
- Spacebar to select options
- Arrow keys to select radio button options or list items

3. Tag the PDF form and correct tagging issues.

If the PDF form is already tagged, use the TouchUp Reading Order tool in Acrobat to tag each form field. This tool also enables you to fix any reading order problems of the text labels for the form fields. For example, you may need to split merged lines of fields into individual fields.

See also

"Set form-field tabbing order in Acrobat" on page 221

"Edit tags with the TouchUp Reading Order tool" on page 308

Making existing PDFs accessible

Add tags to an existing PDF

Creating a tagged document directly from an authoring application is the best way to make PDFs accessible. However, if a PDF was created without tags, you can add them using Add Tags To Document.

1 Open the PDF.

2 Choose Advanced > Accessibility > Add Tags To Document.

After the process is complete, the PDF is tagged and—if any potential problems were encountered—the Add Tags Report appears in the navigation pane.

Note: *The Add Tags To Document command removes any tags that were in the document before the command was run.*

About the Add Tags Report

If Acrobat encounters potential problems while running the Adds Tags To Document command, the Add Tags Report opens in the navigation pane. The report lists potential problems by page, provides a navigational link to each problem, and offers suggestions for fixing them.

You should assess the context of an error before following a particular suggestion for fixing it. For example, the report might state that an element that has been tagged as a figure requires alternate text to make it accessible. When you examine the figure in its context on the page, you may decide that the figure is a background design element, not an illustration that conveys valuable meaning to the user. In the case of a nonessential image, you would change the Figure tag to a Background tag; in the case of an image intended to convey meaning to the reader, you would add the missing alternate text.

Note: *The Add Tags Report highlights tagging-related problems only, and it is a temporary file that you cannot save. You can assess other tagging, reading order, and accessibility problems by using Full Check.*

See also

"Check accessibility with Full Check" on page 291

TouchUp Reading Order tool overview

The TouchUp Reading Order tool provides the easiest and quickest way to fix reading order and basic tagging problems. When you select the TouchUp Reading Order tool, a dialog box opens that lets you see overlay highlights that show the order of page content. Each highlighted region is numbered and highlighted with gray or colored blocks; the number indicates the region's placement in the page's reading order. After you check the reading order of the page, you can correct other, more subtle tagging issues as needed.

The TouchUp Reading Order tool is intended for repairing PDFs that were tagged using Acrobat, not for repairing PDFs that were tagged during conversion from an authoring application. Whenever possible, you should return to the source file and add accessibility features in the authoring application. Repairing the original file ensures that you don't have to repeatedly touch up future iterations of the PDF in Acrobat.

You use the TouchUp Reading Order tool to perform the following accessibility tasks:

- Visually check, and then repair, the reading order of page content
- Tag fillable form fields and their labels
- Add alternate text to figures and descriptions to form fields

- Fix the tagging of simple tables, and prepare complex tables for more advanced manipulation in the logical structure tree
- Remove nonessential content, such as ornamental page borders, from the logical structure tree

To perform more advanced reading order and tagging tasks—such as fixing complex tables, removing obsolete tags after you delete pages, and adding alternate text to links—you need to use the Tags tab, which contains an alternate set of tools and features for manipulating PDF tags. For more information, see "Edit tags with the Tags tab" on page 316.

Select the TouchUp Reading Order tool

- Do one of the following:
- Choose Advanced > Accessibility > TouchUp Reading Order.
- Choose Tools > Advanced Editing > TouchUp Reading Order Tool.
- Click the TouchUp Reading Order tool button in the Advanced Editing toolbar.

Tips for using the TouchUp Reading Order tool

- Save the document (or a copy of it) before you use the TouchUp Reading Order tool. You can't use Undo to reverse changes made with this tool, so reverting to a saved document is the only way to undo such a change.
- Choose View > Page Display > Single Page, when using the TouchUp Reading Order tool. When you click the Clear Structure button, Acrobat clears tags from all visible pages—even pages that are only partially visible.

TouchUp Reading Order options

You can select TouchUp Reading Order options from the dialog box, from the pop-up menu that appears when you right-click/Control-click a highlighted region, or from the Options menu in the Order tab. The TouchUp Reading Order tool includes the following options:

Text Tags the selection as text.

Figure Tags the selection as a figure. Text contained within a figure tag is defined as part of the image and is not read by screen readers.

Form Field Tags the selection as a form field.

Figure/Caption Tags a selected figure and caption as a single tag. Any text contained in the tag is defined as a caption. Useful for tagging photos and captions and preventing caption text from being incorrectly added to adjacent text blocks. Figures may require alternate text.

Heading 1, Heading 2, Heading 3 Tags the selection as a first, second, or third level heading tag. You can convert heading tags to bookmarks to help users navigate the document.

Table Tags the selection as a table after the selection is analyzed to determine the location of headings, columns, and rows.

Cell Tags the selection as a table or header cell. Use this option to merge cells that are incorrectly split.

Formula Tags the selection as a formula. Because speech software may handle formula tags differently from normal text, you may want to add a description using alternate text.

Background Tags the selection as a background element, or artifact, removing the item from the tag tree so that it doesn't appear in the reflowed document and isn't read by screen readers.

Table Inspector Automatically analyzes the selected table into cells and applies the appropriate tags. The table must be tagged as a table before you can use the Table Inspector command on it.

Show Page Content Order Shows content elements as highlighted areas that contain numbers to indicate the reading order. Specify the highlight color by clicking the color swatch.

Show Table Cells Highlights the content of individual table cells. Specify the highlight color by clicking the color swatch.

Show Tables And Figures Outlines each table and figure with a crossed-out box. The box also indicates whether the element includes alternate text. Specify the box color by clicking the color swatch.

Clear Page Structure Removes the tagging structure from the page. Use this option to start over and create a new structure if the existing structure contains too many problems.

Show Order Panel Opens the Order tab to allow you to reorder highlighted content.

Edit Alternate Text Available in the menu that appears when you right-click/Control-click a highlighted figure. Allows the user to add or edit a text description about the figure properties that is read by a screen reader or other assistive technology.

Edit Form Field Text Available in the menu that appears when you right-click/Control-click a form field. Allows the user to add or edit a form field text description that is read by a screen reader or other assistive technology.

Edit Table Summary Available in the menu that appears when you right-click/Control-click a highlighted table. Allows the user to add or edit a text description about the table properties that is read by a screen reader or other assistive technology.

Check and correct reading order

You can quickly check the reading order of tagged PDFs by using the TouchUp Reading Order tool. You can also use this tool to add alternate text to images and correct many types of tagging problems that are outlined in the report that Acrobat generates when you add tags to a PDF.

Reading-order problems are readily apparent when you use the TouchUp Reading Order tool. Each section of contiguous page content appears as a separate highlighted region and is numbered according to its placement in the reading order. Within each region, text is ordered left to right and top to bottom. (You can change this order in the TouchUp preferences.) If a single highlighted region contains two columns of text or text that won't flow normally, divide the region into parts that can be reordered. Because highlighted regions are rectangular, they may overlap somewhat, especially if their page content is irregularly shaped. Unless page content overlaps or is contained within two highlighted regions, no reading order problem is indicated. Page content should belong to no more than one highlighted region.

You can change the reading order of the highlighted regions by moving an item in the Order tab or by dragging it on the page in the document pane. By reordering highlighted regions on the page, you can make a figure and caption read at the specific point that they are referenced in the text. By changing the order of a highlighted region, you effectively change the reading order of that item without changing the actual appearance of the PDF.

Check reading order with the TouchUp Reading Order tool

1 Select the TouchUp Reading Order tool.

2 In the TouchUp Reading Order dialog box, select Show Page Content Order.

Note: *If highlighted regions don't appear in the document pane, the document doesn't contain tags.*

3 Optionally, do any of the following:

- To specify a highlight color, click the color swatch, and then click the color you want.
- To highlight tables and figures, and to view alternate text for figures, select Show Tables And Figures.

4 Check the reading order of text within each highlighted region.

Zooming in can make this step easier.

5 Check the numbered order of all highlighted regions. If consecutive, numbered regions don't follow one another, reorder them in the Order tab.

6 Click Show Order Panel, and then select each content entry (in square brackets [ ]) in the Order tab to highlight that content region in the document pane. Use this method to find numbered regions that you can't see or locate on the page.

Change the reading order in the Order tab

1 Select the TouchUp Reading Order tool.

2 In the TouchUp Reading Order dialog box, click Show Order Panel.

3 In the Order tab, navigate to view a list of highlighted regions that appear in the document pane.

4 In the Order tab, drag the tag for a highlighted region to the location you want. As you drag, a line appears to show potential locations. After you drag an item to a new location, the highlighted regions are renumbered to show the new reading order. You can select and move multiple, adjacent regions.

Change the reading order by dragging on the page

1 Select the TouchUp Reading Order tool.

2 In the TouchUp Reading Order dialog box, select Show Page Content Order.

3 In the document pane, place the pointer over the number for the highlighted region you want to move, and drag it to where you want it to be read. The text-insertion pointer shows target locations within the text.

When you release the highlighted region, the location of the text-insertion pointer becomes the dividing line as the underlying highlighted region is split into two new highlighted regions. All highlighted regions are renumbered to show the new reading order.

Edit tags with the TouchUp Reading Order tool

You can use the TouchUp Reading Order tool to create tags in untagged PDFs or to add new tags to an existing structure. However, this manual tagging doesn't provide the same level of detail to the tagging structure as the Add Tags To Document command, such as paragraphs, bulleted and numbered lists, line breaks, and hyphens. Before you clear the existing structure, make sure that manual tagging is your only recourse.

Tag a region

1 Using the TouchUp Reading Order tool, drag within the document pane to select a region of the page that contains one type of content (for example, a text block).

2 Do one of the following:

- To add more page content to the current selection, Shift-drag.
- To remove page content from the current selection, Ctrl-drag/Command-drag.

3 Click the appropriate button in the TouchUp Reading Order dialog box to specify the tag type.

Change the tag for a region

If Acrobat tags a page element incorrectly, you can change the tag type for the highlighted region.

1 Select the TouchUp Reading Order tool.

2 In the TouchUp Reading Order dialog box, select Show Page Content Order.

3 To select a highlighted region, do one of the following:

- Drag to select it.
- Click the number of a highlighted region.

4 Click the button for the tag type that you want for the highlighted region.

Add or remove content from a tagged region

The TouchUp Reading Order tool always displays as few highlighted regions as possible. If content within a highlighted region doesn't flow properly, you may need to split a region to reorder it. Highlighted regions may also contain adjacent page content that is unrelated or that requires a different tag type. Page content may become orphaned from related elements, particularly if the content doesn't fit within a rectangular shape. Use the TouchUp Reading Order tool to add or remove content from a region, or to split a region to reorder the content.

1 Select the TouchUp Reading Order tool.

2 In the TouchUp Reading Order dialog box, select Show Page Content Order.

3 In the document pane, select a highlighted region.

4 Do one of the following:

- To add content to the current selection, Shift-click the content you want to add. The pointer changes to include a plus sign (+).
- To remove content from the current selection, Ctrl-click/Command-click the content you want to remove. The pointer changes to include a minus sign (-).

5 Click the button for the tag type that you want for the highlighted region.

Split a region into two regions

1 Select the TouchUp Reading Order tool.

2 In the TouchUp Reading Order dialog box, select Show Page Content Order.

3 In the document pane, drag to select a small portion of content near the boundary of the first region that you want to create.

4 Click the Background button in the dialog box. The highlighted region splits into two regions, numbered from right to left.

5 If you need to correct the reading order, click Show Order Panel, and drag the new highlighted region to the correct location in the Order tab.

6 Drag to select the first content region you created, including the region you defined as Background, and then set the tag by clicking a button in the TouchUp Reading Order dialog box.

Apply a heading tag

To help readers navigate a document and find the information they need, make sure that headings are tagged with the appropriate level to indicate their hierarchy in the content.

1 Select the TouchUp Reading Order tool, and then select the heading text in the PDF.

2 In the TouchUp Reading Order dialog box, click the button corresponding to the appropriate heading tag (for example, Heading 1, Heading 2).

After applying heading tags, you can convert the headings to bookmarks to improve navigation. For more information, see "Add tagged bookmarks" on page 330.

Remove page elements from the tag structure

When tagging a PDF, Acrobat can't always distinguish between instructive figures and decorative page elements. Items that visually enhance page layout, such as decorative borders, lines, or background elements, can add clutter to the structure layout and should be removed. Therefore, Acrobat may incorrectly tag artifacts or page elements as figure tags. You can remove artifacts and irrelevant page elements from the tag structure by redefining them with the Background tag or by deleting their tags. If a tagged image in the document doesn't contain useful or illustrative information for the user, you can remove the element from the tagging structure so that it isn't read out loud or reflowed.

1 Select the TouchUp Reading Order tool.

2 In the TouchUp Reading Order dialog box, select Show Page Content Order and Show Tables And Figures.

3 Remove the page element by doing one of the following:

- In the document pane, select the page element, and then click Background in the dialog box.
- In the Order tab, select the page element, and then press Delete.

Edit tags for figures and tables

You can use the TouchUp Reading Order tool to add and edit tags and alternate text for figures and tables.

Apply a figure tag

You can select an element and define it as a figure by using the TouchUp Reading Order tool. Once you define it as a figure, you can add alternate text to describe the figure.

1 Using the TouchUp Reading Order tool, select the figure.

2 In the TouchUp Reading Order dialog box, click Figure.

3 In the document pane, right-click/Control-click the region and choose Edit Alternate Text.

4 Enter alternate text, and click OK.

Check and correct figure tags

You can use the TouchUp Reading Order tool to identify and correct tagging results for figures. Determine whether figures include or require alternate text in order to be read correctly with assistive technologies. Ideally, figure tags should identify image content that is meaningful to the document as a whole, such as graphs or illustrative photographs. If background elements that shouldn't be read are tagged as figures, redefine them as background.

1 Select the TouchUp Reading Order tool, and then click Show Tables And Figures in the dialog box.

2 Do any of the following:

- If a figure isn't tagged as a figure, select the content region you want, and then click Figure or Figure/Caption in the dialog box.
- To remove text that was incorrectly combined with a figure, drag to select the text, and click the Text button in the dialog box.

- To include a caption that is grouped with the figure, select the figure and caption, and click the Figure/Caption button in the dialog box.

Check and add alternate text for figures

If you want screen readers to describe graphical elements that illustrate important concepts in a document, you must provide the description using alternate text. Figures aren't recognized or read by a screen reader unless you add alternate text to the tag properties. If you apply alternate text to text elements, only the description, not the actual text, is read.

1 Select the TouchUp Reading Order tool.

2 Select Show Tables And Figures in the dialog box.

3 Right-click/Control-click the figure, and choose Edit Alternate Text from the pop-up menu.

4 In the Edit Alternate Text dialog box, type a new (or edit an existing) description for the figure, and then click OK.

Edit table tags and tag unrecognized tables

Tables pose a special challenge for screen readers because they present textual or numerical data to be easily referenced visually. Content within table cells can be complex and might contain lists, paragraphs, form fields, or another table.

For best results when tagging tables, use the application that you created the document with to add tags when you create the PDF. If a PDF isn't tagged, you can add tags by using the Add Tags To Document command. Most tables are properly recognized using this command; however, the command may not recognize a table that lacks clear borders, headings, columns, and rows. Use the TouchUp Reading Order tool to determine if the table has been properly recognized and to correct recognition problems. To add specialized formatting to tables and table cells, use the Tags tab.

You can use the Table Inspector to automatically analyze a table into its components and apply the appropriate tags, but you may still need to check and correct some of these tags manually. By viewing table tags, you can determine whether columns, rows, and cells have been correctly identified. Tables that lack well-defined borders and rules are often tagged incorrectly or contain adjacent page elements. You can correct poorly tagged tables by selecting and redefining them; you can split combined cells by creating a tag for each cell.

To correct complex tagging problems for tables, you often must use the Tags tab.

1 Select the TouchUp Reading Order tool, and then click Show Tables And Figures.

2 If the table isn't clearly labeled in the document pane, drag to select the entire table, and then click Table in the dialog box.

3 Click Show Table Cells to make sure that all cells in the table are defined as individual elements.

4 If cells don't appear as separate elements, do one of the following:

- If one or more cells are merged, use the TouchUp Reading Order tool to select the area within a single cell, and then click Cell in the dialog box. Repeat for each merged cell.
- If cells aren't highlighted, the table might not use standard table formatting. Re-create the table in the authoring application.

5 If the table contains cells that are intended to span across two or more columns, set ColSpan and RowSpan attributes for these rows in the tag structure.

Remove or replace document structure tags

If adding tags to a PDF in Adobe Acrobat results in a tagging structure that is overly complicated or too problematic to fix, you can use the TouchUp Reading Order tool to remove or replace the current structure. If the document contains mostly text, you can select a page and then remove headings, tables, and other elements to create a cleaner, simpler tagging structure.

Acrobat can retag an already tagged document after you first remove all existing tags from the tree.

Remove all tags from a PDF

1 Open the Tags tab (View > Navigation Panels > Tags) and select the root (topmost) tag, Tags.

2 In the Tags tab, choose Options > Delete tag.

Note: *The Clear Page Structure command in the TouchUp Reading Order dialog box removes all tags from the currently visible pages.*

Replace the existing tag structure

This procedure works best in pages that contain a single column of text. If the page contains multiple columns, each column must be selected and tagged individually.

1 Select the TouchUp Reading Order tool.

2 In the document pane, drag to select the entire page. The selection includes both text and nontext elements.

3 Ctrl-drag/Command-drag around nontext page elements—such as figures and captions—to deselect them, until only text is selected on the page. Click Text in the TouchUp Reading Order dialog box.

4 In the document pane, select a nontext page element, such as a figure and caption, and click the appropriate button in the dialog box to tag it. Repeat until all page content is tagged.

Add accessible links

With thoughtfully provided links, users can quickly move from one part of a document to another, to related information in a different document, or to a website that is relevant to the content.

For URLs to be accessible to screen readers, you must convert them to active links and make sure that they are correctly tagged in the PDF.

Note: *If you tagged the Adobe PDF during conversion from an authoring application, the links and URLs in the document are probably already active and included in the tag tree so that they are accessible to screen readers. You probably don't have to do this task unless you want to add more links.*

Acrobat provides several ways to create active links for text, objects, and URLs in a PDF. However, the methods differ in how they affect the tag tree. The best way to create accessible links is with the Create Link command.

Unlike the other methods for creating links in a tagged PDF (by using the Links tool or the Create From URLs In Document command), the Create Link command adds all three tags that screen readers require in order to recognize a link. The other methods create only one of the three tags, meaning that you must manually edit the tag tree to add the remaining two tags for each link and place these tags in the proper reading order in the tree. Although you must activate links one by one, using the Create Link command provides the fastest results and the least amount of follow-up work to make the links accessible to screen readers. All that is left to do is optional editing of the tag tree to add alternate text to the new links.

Creating links with Acrobat Standard doesn't generate any tags for the links.

Do the following to make links active and add them to the tag tree:

1 Select the text or object for which you want to create a link.

2 Right-click/Control-click the selection, and choose Create Link from the context menu.

3 In the Create Link dialog box, select the appropriate options, and then follow the on-screen instructions to specify a URL, page view, or file as the link target.

By default, the selected text for each link becomes the link text. After you add all the links, you can edit the tag tree to add alternate text to the links, further improving the accessibility of the PDF.

Set the document language

Setting the document language in a PDF enables some screen readers to switch to the appropriate language. You can set the document language for an entire document with Acrobat Professional, Acrobat 3D, or Acrobat Standard. You can set the document language for specific portions of a multilanguage document with Acrobat Professional or Acrobat 3D.

- To set the language for an entire document, choose File > Properties, and select a language from the Language menu in the Reading Options area of the Advanced tab.
- To set the language for an entire document to a language not in the Language menu, choose File > Properties, and enter the ISO 639 code for the language in the Language field in the Reading Options area of the Advanced tab. For more information, see the ISO Language Codes on http://www.loc.gov/standards.
- To set the language for individual sections or words, select the appropriate text element in the Tags tab, and choose Properties from the Options menu. In the TouchUp Properties dialog box, select the Tag tab. Select a language from the Language menu, and click Close.

Note: *The language that you specify for an element also applies to all elements nested under it in the logical structure tree.*

Prevent security settings from interfering with screen readers

A document author can specify that no part of an accessible PDF is to be copied, printed, extracted, commented on, or edited. This setting could interfere with a screen reader's ability to read the document, because screen readers must be able to copy or extract the document's text in order to convert it to speech.

To maintain document security while allowing screen readers access to text, use one of the following settings:

- For low-encryption-level security, select Enable Copying Of Text, Images, And Other Content in the Password Security - Settings dialog box.
- For high-encryption-level security, select Enable Text Access For Screen Reader Devices For The Visually Impaired in the Password Security - Settings dialog box. This option overrides the document's security settings only for the purpose of giving assistive software, such as screen readers, access to the content.

For instructions on how to set document security, see "Set passwords for PDFs" on page 264.

If your assistive technology product is registered with Adobe as a Trusted Agent, you can read PDFs that might be inaccessible to another assistive technology product. Acrobat recognizes when a screen reader or other product is a Trusted Agent and overrides security settings that would typically limit access to the content for accessibility purposes. However, the security settings remain in effect for all other purposes, such as to prevent printing, copying, extracting, commenting, or editing text.

About watermarks and screen readers

You can add a watermark to a tagged PDF without also adding it to the tag tree. Not having the watermark appear in the tag tree is helpful for people who are using screen readers, because they won't hear the watermark read as document content.

The best way to add a watermark that doesn't interfere with screen readers is to insert an untagged PDF of the watermark into a tagged PDF.

See also

"Add and edit watermarks" on page 131

Editing document structure with the Content and Tags tabs

Correct reflow problems with the Content tab

Use the Content tab to correct reflow problems in a PDF that can't be corrected by using the TouchUp Reading Order tool. Because you can damage a PDF by editing content objects, make sure that you're familiar with PDF structure before you make any changes. For comprehensive information about PDF structure, see the *PDF Reference Fifth Edition: Adobe Portable Document Format Version 1.6*, on the PDF reference page (English only) of the Adobe website.

The Content tab provides a hierarchical view of the objects that make up a PDF, including the PDF object itself. Each document includes one or more pages, a set of annotations (such as comments and links), and the content objects for the page, consisting of containers, text, paths, and images. Objects are listed in the order in which they appear on the page, similar to tags in the logical structure tree. However, PDFs don't require tags for you to view or change the object structure.

1. Choose View > Navigation Panels > Content.
2. Click the plus sign (+) (Windows) or the triangle (Mac OS) next to the document name to view pages and objects.
3. Move a container or object by selecting it and doing one of the following:

- Drag it to the location you want.
- Choose Cut from the Options menu, select the tag above the location you want to paste the cut tag, and choose Paste from the Options menu.

Note: *Container elements can't be pasted directly to page elements. To move a container to another page, cut the container you want to move, select a container on the page you want to move the container to, and choose Paste from the Options menu. Then, drag the container out one level to the location that you want.*

Content tab options

In the Content tab, use the Options menu or right-click/Control-click an object to choose from the following options:

New Container Adds a new container object at the end of the selected page or container.

Edit Container Dictionary Specifies the dictionary for the container. Errors in this dialog box may damage the PDF. Available only for containers that include dictionaries.

Cut Cuts and copies the selected object (not the related page content).

Paste Pastes content directly below the selected object at the same hierarchical level.

Paste Child Pastes content into the selected object as a child content item.

Delete Removes the object (not the related page content) from the document.

Find Content From Selection Searches for the object in the Content tab that contains the object selected in the document pane.

Find Searches for unmarked (untagged) artifacts, content, comments, and links. Options allow you to search the page or document, and to add tags to found items.

Create Artifact Defines selected objects as artifacts. Artifacts are not read by a screen reader or by the Read Out Loud feature. Page numbers, headers, and footers are often best tagged as artifacts.

Remove Artifact Removes the artifact definition from the selected object.

Highlight Content When selected, highlights appear in the document pane around content that relates to a selected object in the Content tab.

Show Metadata Allows viewing and editing of image or object metadata.

Properties Opens the TouchUp Properties dialog box.

About the Tags tab

The Tags tab allows you to view and edit tags in the logical structure tree, or tags tree, of a PDF. In the Tags tab, tags appear in a hierarchical order that indicates the reading sequence of the document. The first item in this structure is the Tags root. All other items are tags and are children of the Tags root. Tags use coded element types that appear in angle brackets (< >). Each element, including structural elements such as sections and articles, appears in the logical structure order by type, followed by a title and the element's content or a description of the content. Structural elements are typically listed as container—or parent—tags and include several smaller elements—or child tags—within them.

Note: *For more information on logical structures, refer to the PDF Reference Fifth Edition: Adobe Portable Document Format Version 1.6, on the PDF reference page (English only) of the Adobe website.*

Though you can correct most tagging issues by using the TouchUp Reading Order tool, you must use the Tags tab to address detailed tagging of tables and substructure items—such as paragraphs, lists, and sections that require multiple languages. Add tags manually to a document in the Tags tab only as a last resort. First consider using the Add Tags To Document command.

Important: *Operations performed in the Tags tab cannot be undone with the Undo command. Save a backup copy of a document before you begin work on it in the Tags tab.*

View tags in the Tags tab

1. Choose View > Navigation Panels > Tags.
2. Do one of the following:

- Click the plus sign (Windows) or triangle (Mac OS) next to the tags root and tags to expand the section you want.
- Ctrl-click the plus sign (Windows) or Option-click the triangle (Mac OS) next to the Tags root to show all tags in the logical structure tree.

Edit tags with the Tags tab

You can edit a tag title, change a tag location, or change the tag type for an element. All page content must be tagged, marked as an artifact, or removed from the logical structure tree.

Edit a tag title

1 In the Tags tab, expand the section of the logical structure that you want to edit.

2 To edit the title, Select the tag, choose Properties from the Options menu, enter text in the Title box, and click Close.

Move a tag

1 In the Tags tab, expand the Tags root to view all tags.

2 Select the Tag icon of the element that you want to move.

3 Do one of the following:

- Drag the tag to the location you want. As you drag, a line appears at viable locations.
- Choose Cut from the Options menu, and select the tag that appears above the location you want to paste the cut tag. From the Options menu, choose Paste to move the tag to the same level as the selected tag, or choose Paste Child to move the tag within the selected tag.

Change the element type

1 In the Tags tab, expand the section of the logical structure that you want to change.

2 Select an element and choose Properties from the Options menu.

3 Choose a new element type from the Type menu, and then click Close.

Tags tab options

In the Tags tab, use the Options menu or right-click/Control-click a tag in the logical structure tree to choose from the following options:

New Tag Creates a new tag in the logical structure tree after the currently selected item. Specify type and title of the new tag.

Cut Removes the selected tag from its current location and puts it on the clipboard.

Paste Places the tag that's on the clipboard into the location specified, replacing the selected tag.

Paste Child Places the tag that's on the clipboard into the location specified, as a child of the selected tag.

Delete Tag Removes the selected tag.

Find Tag From Selection Searches for the tag in the Tags tab that contains the text or object selected in the document pane.

Create Tag From Selection Creates a new tag in the logical structure tree after the item selected in the document pane. Specify type and title of the new tag.

Find Searches for artifacts, OCR suspects, and unmarked (untagged) content, comments, links, and annotations. Options allow you to search the page or document and add tags to found items.

Change Tag To Artifact Changes selected tags to artifacts and removes the tagged content from the structure tree.

Copy Contents To Clipboard Copies all content contained within the selected tags.

Edit Class Map Allows you to add, change, and delete the class map, or style dictionary, for the document. Class maps store attributes that are associated with each element.

Edit Role Map Allows you to add, change, and delete role maps for the document. Role maps allow each document to contain a uniquely defined tag set. By mapping these custom tags to predefined tags in Acrobat, custom tags are easier to identify and edit.

Tag Annotations When selected, all new comments and form fields are added to the tag tree after the selected tag element; existing comments and form fields aren't added to the tag tree. Highlight and Underline comments are automatically associated and tagged with the text that they annotate and don't require this option.

Document Is Tagged PDF Flags the PDF as a tagged document. Deselect to remove the flag.

Important: *This option doesn't necessarily indicate that the PDF conforms to PDF guidelines and should be used judiciously.*

Highlight Content When selected, causes highlights to appear around content in the document pane when you select the related tag in the Tags tab.

Show Metadata Opens a read-only dialog box that contains reference information about the selected tag.

Properties Opens the TouchUp Properties dialog box.

Add alternate text and supplementary information to tags

Some tagged PDFs might not contain all the information necessary to make the document contents fully accessible. For example, if you want to make a document available to a screen reader, the PDF should contain alternate text for figures, language properties for portions of the text that use a different language than the default language for the document, and expansion text for abbreviations. Designating the appropriate language for different text elements ensures that the correct characters are used when you repurpose the document and that it is spell-checked with the correct dictionary.

You can add alternate text and multiple languages to a tag from the Tags tab. (If only one language is required, choose the language with File > Properties instead.) You can also add alternate text by using the TouchUp Reading Order tool.

Note: *Keep alternate text descriptions as concise as possible.*

Add alternate text to links

Screen readers can read the URLs of web links out loud, but adding meaningful alternate text to links can help users immensely. For example, by adding alternate text you can have a screen reader tell a user to "go to the Acrobat accessibility page of adobe.com" rather than "go to http://www.adobe.com/products/acrobat/solutionsacc.html."

You add alternate text to the `<Link>` tag of a link.

Note: *You must add alternate text only to tags that don't have child tags. Adding alternate text to a parent tag prevents a screen reader from reading any of that tag's child tags.*

1. In the tag tree, select the `<Link>` tag for the link and choose Options > Properties.
2. In the TouchUp Properties dialog box, select the Tag tab.
3. Type alternate text for the link, and click Close.

Add alternate text for a figure

1. Choose View > Navigation Panels > Tags.
2. Expand the logical structure tree to find and select the `<Figure>` tag element for the image.

To find a tag more easily, use the TouchUp Reading Order tool to select the figure—or text near the figure—in the document pane, and then choose Find Tag From Selection from the Options menu in the Tags tab.

3 Choose Highlight Content from the Options menu in the Tags tab to see a highlighted area in the document that corresponds to the tag.

4 Choose Properties from the Options menu in the Tags tab.

5 In the TouchUp Properties dialog box, click the Tag tab.

6 For Alternate Text, type text that describes the figure.

Add alternate text for an abbreviated term

1 In the Tags panel, locate the abbreviated term by doing one of the following:

- Expand the tag tree as needed to see the elements that contain the abbreviation.
- Use the TouchUp Text tool or the Select tool to select the abbreviation in the document, and then choose Find Tag From Selection from the Options menu to locate the text in the tag tree.

2 Select the tag for that element, and choose Properties from the Options menu.

Note: *If the abbreviation includes additional text, cut the additional text and place it in a new* `<Span>` *child tag within the same* `<Span>` *parent tag.*

3 In the TouchUp Properties dialog box, select the Tag tab.

4 For Alternate Text, type the unabbreviated version of the term.

5 Click Close.

Create a new child tag

1 In the Tags tab, select the parent node (the icon located at the same level at which you want to create a child tag) in the Tags tree for which you want to create a child tag.

2 Choose New Tag from the Options menu.

3 Select the appropriate tag type from the Type pop-up menu, or type a custom tag type, name the tag (optional), and then click OK.

Add tags to comments

When you tag a PDF that includes comments, the comments are tagged as well. However, if you add comments to a PDF that's already tagged, your comments are untagged unless you enable comment tagging first.

Note: *To Enable comment tagging in a PDF, in the Tags tab, choose Tag Annotations from the Options menu. Comments or markups that you add to the PDF are tagged automatically.*

If a document contains untagged comments, you can locate them in the logical structure tree and tag them by using the Find command in the Tags tab.

1 In the Tags tab, choose Find from the Options menu.

2 In the Find Element dialog box, choose Unmarked Comments from the Find pop-up menu, and click Find.

3 When the comment type appears in the Type field (for example, Text), click Tag Element, choose Annotation from the Type pop-up menu in the New Tag dialog box, and then click OK.

4 In the Find Element dialog box, click Find Next to locate and tag all comments, and then click Close.

Correct table tags with the Tags tab

Use the TouchUp Reading Order tool to make sure that tables are tagged correctly. If you need to structure figures and text within the cells of your table, you may prefer to re-create the table in the authoring application before you convert it as an accessible PDF. Adding tags on a cell level in Acrobat is a labor-intensive procedure.

Before you make any changes to table elements, use the TouchUp Reading Order tool to determine that the table is tagged correctly.

Check table elements

1 In the Tags tab, expand the tags root to view a table tag.

2 Select the table tag <Table> and verify that it contains one of the following elements:

- Table Rows, each of which contains Table Header <TH> or Table Data <TD> cells.
- <THead>, <TBody>, and <TFoot> sections, each of which contains Table Rows. (The Table Rows contain <TH> cells, <TD> cells, or both.)

3 Do one or more of the following:

- If the tag for the table doesn't contain these elements, but rows, columns, and cells appear in the table in the document pane, use the TouchUp Reading Order tool to select and define the table or individual cells.
- If the table contains rows that span two or more columns, set ColSpan and RowSpan attributes for these rows in the tag structure.
- Re-create the table in the authoring application, and then convert it to a tagged PDF.

Set ColSpan and RowSpan attributes

1 In the Tags tab, select a <TD> or <TH> element.

2 Choose Properties from the Options menu.

3 In the TouchUp Properties dialog box, click the Tag tab, and then click Edit Attribute Objects.

4 Select Attribute Objects, and then click New Item to create a new Attribute Object Dictionary.

5 Expand the new dictionary, select the Layout attribute, and then click Change Item.

6 Change the Layout value to Table.

7 Select the Attribute Object Dictionary, and click New Item.

8 In the Add Key And Value dialog box, type **ColSpan** or **RowSpan** in the Key box, enter the number of columns or rows spanned in the Value box, choose Integer from the Value Type pop-up menu, and click OK.

Standard PDF tags

This section describes the standard tag types that apply to tagged PDFs. These standard tags provide assistive software and devices with a base set of semantic and structural elements to use in interpreting document structure and presenting content to a user in a useful manner.

The PDF tags architecture is extensible, so any PDF document can contain any tag set that an authoring application decides to use. For instance, a PDF might have XML tags that came in from an XML schema. Any custom tags that you define (such as tag names that were generated from paragraph styles from an authoring application) should have a role map that matches each custom tag to one of the standard tags here. When assistive software encounters a custom tag, the software can refer to this role map and properly interpret the tags. Tagging PDFs by using one of the methods described in this guide generally produces a correct role map for the document.

Note: *You can view and edit the role map of a PDF by choosing Options > Edit Role Map in the Tags tab.*

The standard Adobe element tag types are available in the New Tag dialog box and in the TouchUp Properties dialog box in Acrobat Professional or Acrobat 3D. Adobe strongly encourages using these tag types, because they provide the best results when tagged content must be converted to a different format, such as HTML, Microsoft Word, or an accessible text format for use by other types of assistive technology.

Block-level elements are page elements that consist of text laid out in paragraph-like forms. Block-level elements are part of a document's logical structure. Such elements are further classified as container elements, heading and paragraph elements, label and list elements, special text elements, and table elements.

Container elements

Container elements are the highest level of element and provide hierarchical grouping for other block-level elements.

Document Document element. The root element of a document's tag tree.

Part Part element. A large division of a document; may group smaller units of content together, such as division elements, article elements, or section elements.

Div Division element. A generic block-level element or group of block-level elements.

Art Article element. A self-contained body of text considered to be a single narrative.

Sect Section element. A general container element type, comparable to Division (`DIV Class="Sect"`) in HTML, which is usually a component of a part element or an article element.

Heading and paragraph elements

Heading and paragraph elements are paragraph-like, block-level elements that include specific level heading and generic paragraph (`P`) tags. A heading (`H`) element should appear as the first child of any higher-level division. Six levels of headings (`H1` to `H6`) are available for applications that don't hierarchically nest sections.

Label and list elements

Label and list elements are block-level elements used for structuring lists.

L List element. Any sequence of items of similar meaning or other relevance; immediate child elements should be list item elements.

LI List item element. Any one member of a list; may have a label element (optional) and a list body element (required) as a child.

LBL Label element. A bullet, name, or number that identifies and distinguishes an element from others in the same list.

LBody List body element. The descriptive content of a list item.

Special text elements

Special text elements identify text that isn't used as a generic paragraph (`P`).

BlockQuote Block quote element. One or more paragraphs of text attributed to someone other than the author of the immediate surrounding text.

Caption Caption element. A brief portion of text that describes a table or a figure.

Index Index element. A sequence of entries that contain identifying text and reference elements that point out the occurrence of the text in the main body of the document.

TOC Table of contents element. An element that contains a structured list of items and labels identifying those items; has its own discrete hierarchy.

TOCI Table of contents item element. An item contained in a list associated with a table of contents element.

Table elements

Table elements are special elements for structuring tables.

Table Table element. A two-dimensional arrangement of data or text cells that contains table row elements as child elements and may have a caption element as its first or last child element.

TR Table row element. One row of headings or data in a table; may contain table header cell elements and table data cell elements.

TD Table data cell element. A table cell that contains nonheader data.

TH Table header cell element. A table cell that contains header text or data describing one or more rows or columns of a table.

Inline-level elements

Inline-level elements identify a span of text that has specific formatting or behavior. They are differentiated from block-level elements. Inline-level elements may be contained in or contain block-level elements.

BibEntry Bibliography entry element. A description of where some cited information may be found.

Quote Quote entry element. An inline portion of text that is attributed to someone other than the author of the text surrounding it; different from a block quote, which is a whole paragraph or multiple paragraphs, as opposed to inline text.

Span Span entry element. Any inline segment of text; commonly used to delimit text that is associated with a set of styling properties.

Special inline-level elements

Similar to inline-level elements, special inline-level elements describe an inline portion of text that has special formatting or behavior.

Code Code entry element. Computer program text embedded within a document.

Figure Figure entry element. A graphic or graphic representation associated with text.

Form Form entry element. A PDF form annotation that can be or has been filled out.

Formula Formula entry element. A mathematical formula.

Link Link entry element. A hypertext link that is embedded within a document. The target can be in the same document, in another PDF document, or on a website.

Note Note entry element. Explanatory text or documentation, such as a footnote or endnote, that is referred to in the main body of text.

Reference Reference entry element. A citation to text or data that is found elsewhere in the document.

Chapter 11: Editing PDFs

It's a fact that Adobe PDF is unlike other document formats, in which you can freely copy, paste, and move text and images on a page. Instead, consider a PDF as a snapshot of your original file. Use Adobe Acrobat to touch up and enhance the file for readability and distribution, and reserve more substantial revisions for your source application.

Quickstart

The following topics provide quick steps to some common PDF editing tasks.

Add a bookmark

You can add navigation to a PDF with bookmarks.

1. Open to the desired page and adjust the view settings.
2. (Optional) To bookmark text, select the desired text.
3. Click the Bookmarks button in the navigation pane, and choose New Bookmark from the Options menu.
4. Type or edit the bookmark name.

You can also add bookmarks to specific portions of a page, such as an image or a table, or to another PDF.

See also

"Create a bookmark" on page 327

Add a link

Links take you to other locations in the same document, to other documents, or to websites. They can also trigger actions, such as playing a sound or movie file or submitting a form.

1. Choose Tools > Advanced Editing > Link Tool.
2. Drag a rectangle where you want to create a link.
3. In the Create Link dialog box, choose the desired link appearance and action.
4. Follow the on-screen instructions to create the link.

See also

"Create a link" on page 331

Attach files to a PDF

You can attach many types of files to a PDF.

1. Choose Document > Attach A File.
2. Select the file you want to attach, and click Open.

3 (Optional) To add a description to distinguish the file from similar attachments, select the file in the Attachment panel, and choose Options > Edit Description.

You can also collect files into a PDF package or merge files into a single PDF.

See also

"Add an attachment" on page 334

Optimize a PDF

Reduce file size by removing embedded fonts, compressing images, and removing unneeded items from a PDF.

1 Choose Advanced > PDF Optimizer.

2 Choose an option from the Make Compatible With menu.

3 Select an item on the left, and then specify settings. For example, select Images, and then set compression for color, grayscale, and monochrome images.

4 Specify a filename and location, and click Save.

Some compression methods may make images unusable in a print production workflow.

See also

"PDF Optimizer" on page 343

Edit text

You can add or replace small amounts of text in a PDF if the font is installed on the system. Otherwise, you can edit text attributes only. For extensive changes, edit the original document from which the PDF was created.

1 Choose Tools > Advanced Editing > TouchUp Text Tool.

2 Select the text you want to edit.

3 Type to replace text, or press Delete to remove text.

If you cannot edit text, the document may have security restrictions.

See also

"Edit text" on page 348

Format text

You can change text attributes such as font and font size, color, character and word spacing, baseline offset, and horizontal scaling.

1 Choose Tools > Advanced Editing > TouchUp Text Tool.

2 Click in the text you want to edit, and then right-click/Control-click and choose Properties.

3 Change text attributes as desired.

If the necessary font is installed on the system, you can also use the TouchUp Text tool to edit the text.

See also

"Edit text" on page 348

Edit an image

You can change the size, location, and properties of an image in a PDF.

1 Choose Tools > Advanced Editing > TouchUp Object Tool.

2 Select the desired image, and do one of the following:

- To change image properties or edit the image, right-click/Control-click and choose the relevant command.
- To move the image, drag it to a new location on the page.
- To resize the image, drag one of the image handles.

See also

"Move or edit an object" on page 351

View object metadata

You can view the metadata information of certain images, tags, and objects. Do one of the following:

- For an object, choose Tools > Advanced Editing > TouchUp Object Tool. Right-click/Control-click the object, and choose Show Metadata. (If the command isn't available, the object has no metadata.)
- For a Visio object, choose Tools > Object Data > Object Data Tool. Double-click the object to view its metadata in the Model Tree.

See also

"View object data and metadata" on page 358

View content on layers

To view information stored on different layers of a PDF, use the Layers panel.

1 Click the Layers button in the navigation pane.

2 Click the eye icon to hide a layer's content. Click the empty box to show a layer's content.

To save a different view of a layered PDF, you must change the default state of the layers in the Layer Properties dialog box.

See also

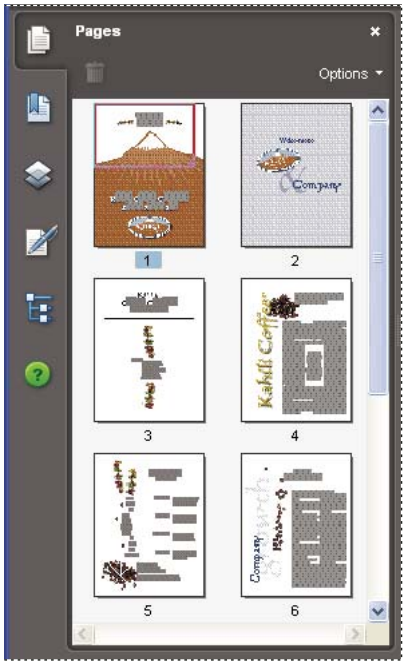
"Show or hide layers" on page 360

Page thumbnails and bookmarks

About page thumbnails

Page thumbnails are miniature previews of the pages in a document. You can use page thumbnails in Acrobat to jump quickly to a selected page or to adjust the view of the page.

When you move, copy, or delete a page thumbnail, you actually move, copy, or delete the corresponding page.



Create page thumbnails

Because page thumbnails increase file size, they are not automatically created. After you create page thumbnails, you can embed them in the PDF. Embedding prevents the page thumbnails from redrawing each time you click the Pages button, often a time-consuming process. Embedded page thumbnails won't reflect changes that you make to document pages until you unembed the page thumbnails.

Both Acrobat Distiller and the batch processing feature in Acrobat provide alternate methods of embedding page thumbnails.

See also

"Run a predefined batch sequence" on page 364

"PostScript options" on page 434

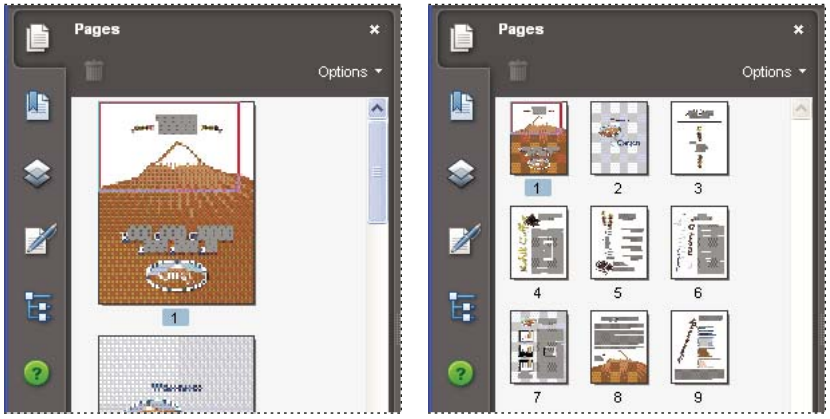
Create page thumbnails

❖ Click the Pages button on the left.

Page thumbnails appear in the navigation pane. This process may require several seconds, particularly in larger documents. The drawing of page thumbnails may pause if you interact with the application during this process.

Resize page thumbnails

❖ In the Pages panel, choose Reduce Page Thumbnails or Enlarge Page Thumbnails from the Options menu.



Embed or unembed page thumbnails in a PDF

❖ In the Pages panel, choose Embed All Page Thumbnails or Remove Embedded Page Thumbnails from the Options menu.

Embed or unembed page thumbnails in a PDF package

1 Choose Advanced > Document Processing > Batch Processing.

2 Do one of the following:

- To embed page thumbnails, click Embed Page Thumbnails, and then click Run Sequence. Follow the instructions provided.
- To unembed page thumbnails, click New Sequence, and set up a new batch processing operation to remove the embedded page thumbnails.

Define the tabbing order

In the Pages panel, you can set the order in which a user tabs through form fields, links, and comments for each page.

1 Click the Pages button on the left.

2 Select a page thumbnail, and choose Page Properties from the Options menu.

3 In the Page Properties dialog box, click Tab Order, and select the tab order:

Use Row Order Moves through rows from left to right, or right to left for pages with a right-to-left binding.

Use Column Order Moves through columns from left to right and from top to bottom, or right to left for pages with a right-to-left binding.

Use Document Structure Moves in the order specified by the authoring application.

Note: *For structured documents—PDFs that were created from desktop publishing applications or that contain tags—it's best to select the Use Document Structure option to match the intention of the authoring application.*

If the document was created in an earlier version of Acrobat, the tab order is Unspecified by default. With this setting, form fields are tabbed through first, followed by links and then comments ordered by row.

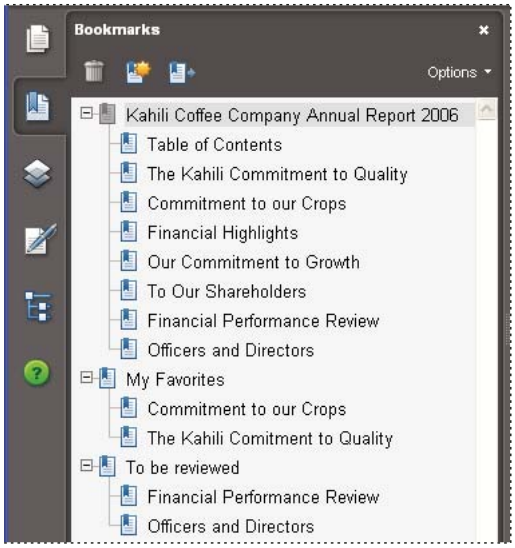
About bookmarks

A *bookmark* is a type of link with representative text in the Bookmarks panel in the navigation pane. Each bookmark goes to a different view or page in the document. Bookmarks are generated automatically during PDF creation from the table-of-contents entries of documents created by most desktop publishing programs. These bookmarks are often tagged and can be used to make edits in the PDF.

Initially, a bookmark displays the page that was in view when the bookmark was created, which is the bookmark's *destination*. Although you can set bookmark destinations as you create each bookmark, it is sometimes easier to create a group of bookmarks, and then set the destinations later.

You can use bookmarks to mark a place in the PDF to which you want to return, or to jump to a destination in the PDF, another document, or a web page. Bookmarks can also perform actions, such as executing a menu item or submitting a form.

Note: *A user can add bookmarks to a document only if the security settings allow it.*



Bookmarks act as a table of contents for some PDFs.

See also

"About tags, accessibility, reading order, and reflow" on page 289

Create a bookmark

1 Open the page where you want the bookmark to link to, and adjust the view settings.

2 Use the Select tool to create the bookmark:

- To bookmark a single image, click in the image, or drag a rectangle around the image.
- To bookmark a portion of an image, Ctrl-drag/drag a rectangle around the portion.
- To bookmark selected text, drag to select it. The selected text becomes the label of the new bookmark. You can edit the label.

3 Click the Bookmarks button, and select the bookmark under which you want to place the new bookmark. If you don't select a bookmark, the new bookmark is automatically added at the end of the list.

4 Choose New Bookmark from the Options menu, or click the New Bookmark icon at the top of the Bookmarks panel.

5 Type or edit the name of the new bookmark, and press Enter/Return.

Edit a bookmark

You can change a bookmark's attributes at any time.

See also

"Action types" on page 337

Rename a bookmark

❖ Select the bookmark in the Bookmarks panel, choose Rename Bookmark in the Options menu, and type the new bookmark name.

Wrap text in a long bookmark

❖ Click the Bookmarks button, and choose Wrap Long Bookmarks from the Options menu.

All the text of long bookmarks shows regardless of the width of the navigation pane. (This option is on when checked, and off when not checked.)

Change the text appearance of a bookmark

You can change the appearance of a bookmark to draw attention to it.

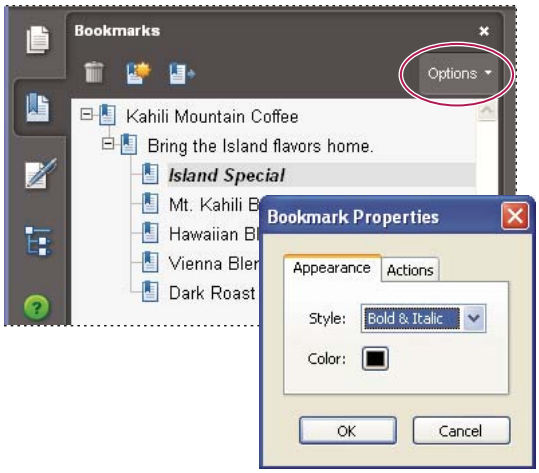
1 In the Bookmarks panel, select one or more bookmarks.

2 Change the color and style of the text by doing one of the following:

- Choose View > Toolbars > Properties Bar to open the Properties toolbar.
- Right-click/Control-click the bookmark, and select Properties. Click the Appearance tab.

After you have defined a bookmark's appearance, you can reuse the appearance settings by selecting the bookmark and choosing the Use Current Appearance As New Default command from the bookmark's context menu.

3 To change the font size, click the Options menu, and choose Text Size > [*size*].



Set a bookmark's appearance in the Bookmark Properties dialog box.

Change a bookmark's destination

1 Click the Bookmarks button, and select the bookmark.

2 In the document pane, move to the location you want to specify as the new destination.

3 If necessary, adjust the view magnification.

4 Choose Set Bookmark Destination in the Options menu.

Add an action to a bookmark

1 Click the Bookmarks button.

2 Right-click/Control-click a bookmark, and choose Properties.

3 In the Bookmark Properties dialog box, click Actions.

4 Choose an action from the Select Action menu, and click Add.

Delete a bookmark

1 Click the Bookmarks button, and select the bookmark or range of bookmarks you want to delete.

2 Choose Delete Bookmark(s) in the Options menu.

Important: *Deleting a bookmark deletes any bookmarks that are subordinate to it. Deleting a bookmark does not delete any document text.*

Create a bookmark hierarchy

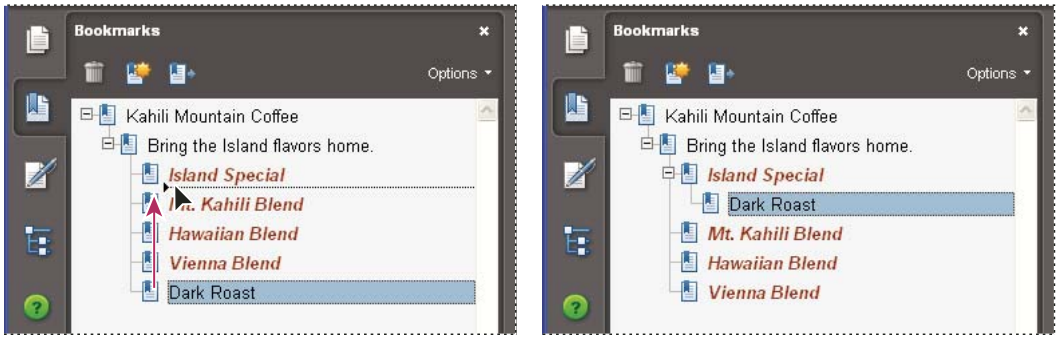
You can nest a list of bookmarks to show a relationship between topics. Nesting creates a parent/child relationship. You can expand and collapse this hierarchical list as desired.

Nest one or more bookmarks

1 Select the bookmark or range of bookmarks you want to nest.

2 Drag the icon or icons directly underneath the parent bookmark icon. The Line icon shows the position of the icon or icons.

The bookmark is nested; however, the actual page remains in its original location in the document.



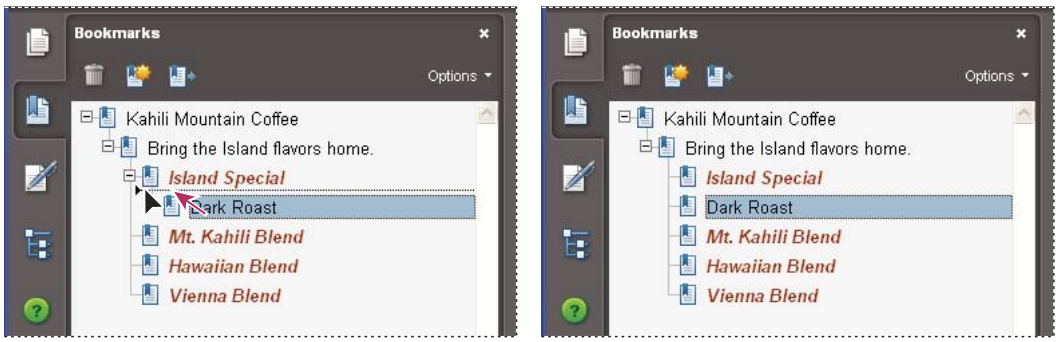
Nesting a bookmark (left), and the result (right)

Move bookmarks out of a nested position

1 Select the bookmark or range of bookmarks you want to move.

2 Move the selection by doing one of the following:

- Drag the icon or icons, positioning the arrow directly under the label of the parent bookmark.
- Choose Cut from the Options menu, select the parent bookmark, and then choose Paste Under Selected Bookmark from the Options menu.



Moving a bookmark out of its nested position (left), and the result (right)

Expand or collapse a bookmark

Do one of the following:

- Click the plus sign (+) or horizontal triangle next to the bookmark icon to show any children. Click the minus sign (-) or inverted triangle to collapse the list again.
- Select the bookmark, and choose Expand Current Bookmark from the Options menu.

Expand or collapse all top-level bookmarks

❖ From the Options menu, choose Expand Top-Level Bookmarks or Collapse Top-Level Bookmarks.

Add tagged bookmarks

Tagged bookmarks give you greater control over page content than do regular bookmarks. Because tagged bookmarks use the underlying structural information of the document elements (for example, heading levels, paragraphs, table titles), you can use them to edit the document, such as rearranging their corresponding pages in the PDF, or deleting pages. If you move or delete a parent tagged bookmark, its children tagged bookmarks are moved or deleted along with it.

Many desktop publishing applications, such as Adobe InDesign and Microsoft Word, create structured documents. When you convert these documents to PDF, the structure is converted to tags, which support the addition of tagged bookmarks. Converted web pages typically include tagged bookmarks.

If your document doesn't include tags, you can always add them in Acrobat.

1 Click the Bookmarks button, and choose New Bookmarks From Structure from the Options menu. (If this option isn't available, the document isn't structured.)

2 Select the structure elements you want specified as tagged bookmarks. Ctrl-click/Command-click to add to the selection.

The tagged bookmarks are nested under a new, untitled bookmark.

See also

"Edit tags with the Tags tab" on page 316

"Links and bookmarks in web pages" on page 339

Links and attachments

Create a link

Links let you jump to other locations in the same document, to other electronic documents including attachments, or to websites. You can use links to initiate actions or to ensure that your reader has immediate access to related information. You can also add actions to play a sound or movie file.



Clicking a link jumps to another page, document, or website.

See also

"Movies and sounds" on page 381

"Destinations" on page 333

Create a link using the Link tool

1 Choose Tools > Advanced Editing > Link Tool, or select the Link tool in the Advanced Editing toolbar.

The pointer becomes a cross hair (+), and any existing links in the document, including invisible links, are temporarily visible.

2 Drag a rectangle where you want to create a link. This is the area in which the link is active.

3 In the Create Link dialog box, choose the options you want for the link appearance.

4 Select one of the following link actions:

Go To A Page View Click Next to set the page number and view magnification you want in the current document or in another document (such as a file attachment), and then click Set Link.

Open A File Select the destination file and click Select. If the file is a PDF, specify how the document should open (for example in a new window or within an existing window), and then click OK.

Note: *If the filename is too long to fit in the text box, the middle of the name is truncated.*

Open A Web Page Provide the URL of the destination web page.

Custom Link Click Next to open the Link Properties dialog box. In this dialog box, you can set any action, such as reading an article, or executing a menu command, to be associated with the link.

Create a link using the Select tool or Snapshot tool

1 Using the Select tool or the Snapshot tool (Tools > Select & Zoom), drag to select the text or image from which you want to create a link.

2 Right-click/Control-click the selection, and choose Create Link.

3 Select the options you want in the Create Link dialog box.

Note: *The Custom Link option is not available for links created from selected text.*

Edit a link

You can edit a link at any time. You can change its hotspot area or associated link action, delete or resize the link rectangle, or change the destination of the link. Changing the properties of an existing link affects only the currently selected link. If a link isn't selected, the properties will apply to the next link you create.

You can change the properties of several links at once if you drag a rectangle to select them using the Link tool or the Select Object tool.

Move or resize a link rectangle

1 Select the Link tool or the Select Object tool, and then move the pointer over the link rectangle so that the handles appear.

2 Do one of the following:

- To move the link rectangle, drag it.
- To resize the link rectangle, drag any corner point.

Change the appearance of a link

1 Select the Link tool and double-click the link rectangle.

2 In the Appearance tab of the Link Properties dialog box, choose a color, line thickness, and line style for the link.

3 Select a highlight style for when the link is selected:

None Doesn't change the appearance of the link.

Invert Changes the link's color to its opposite.

Outline Changes the link's outline color to its opposite.

Inset Creates the appearance of an embossed rectangle.

Note: *The Link Type, Color, and Line Style options are not available if Invisible is selected for Appearance.*

4 Select Invisible Rectangle for Link Type if you don't want users to see the link in the PDF. An invisible link is useful if the link is over an image.

5 Select the Locked option if you want to prevent users from accidentally changing your settings.

6 To test the link, select the Hand tool.

Note: *The link properties in the Create Link dialog box apply to all new links that you create until you change the properties. To reuse the appearance settings for a link, right-click/Control-click the link whose properties you want to use as the default, and choose Use Current Appearance As New Default.*

Edit a link action

1 Select the Link tool and double-click the link rectangle.

2 In the Actions tab of the Link Properties dialog box, select the listed action you want to change, and click Edit.

Delete a link

1 Select the Link tool or the Select Object tool.

2 Select the link rectangle you want to delete.

3 Choose Edit > Delete, or press the Delete key.

Create web links from URLs

You can automatically create links in a PDF from all URLs or from URLs on selected pages. When selected, the Create Links From URLs setting in the General preferences generates active links from text in all PDFs that you open.

Create web links

1 Choose Advanced > Document Processing > Create Links From URLs.

2 In the Create Web Links dialog box, select All to create links from all URLs in the document, or select From and enter a page range to create links on selected pages.

Remove all web links

❖ Choose Advanced > Document Processing > Remove All Links.

Link to a file attachment

You can direct users to a PDF attachment by creating a link in the parent PDF document that jumps to the attachment.

Note: *Don't confuse file attachments with files that can be opened from a link. Linked documents may be stored in different locations; file attachments are always saved with the PDF.*

1 Open a PDF that contains a PDF file attachment.

2 Go to where you want to create a link. If that location is in the file attachment, click the Attachments button in the navigation pane, select the file attachment, and click Open.

3 Choose Tools > Advanced Editing > Link Tool, or select the Link tool in the Advanced Editing toolbar.

4 Select the area for the link.

5 In the Create Link dialog box, set the link appearance, select Go To A Page View, and then click Next.

6 Set the page number and view magnification you want, either in the parent PDF document or in the file attachment, and then click Set Link.

Destinations

A *destination* is the end point of a link and is represented by text in the Destinations panel. Destinations enable you to set navigation paths across a collection of PDFs. Linking to a destination is recommended when linking across documents because, unlike a link to a page, a link to a destination is not affected by the addition or deletion of pages within the target document.

View and manage destinations

Manage destinations from the Destinations panel in the navigation pane.

View destinations

❖ Choose View > Navigation Panels > Destinations. All destinations are automatically scanned.

Sort the destinations list

❖ Do one of the following:

- To sort destination names alphabetically, click the Name label at the top of the Destinations panel.
- To sort destinations by page number, click the Page label at the top of the Destinations panel.

Change or delete a destination

❖ In the Destinations panel, right-click/Control-click the destination, and choose a command:

- To move to the target location, choose Go To Destination.
- To delete the destination, choose Delete.
- To reset the target of the destination to the page displayed, choose Set Destination.
- To give the destination a different name, choose Rename.

Create and link a destination

You can create a link to a destination in the same or another PDF.

1 In the target document (destination), choose View > Navigation Panels > Destinations. If the document already includes a destination that you want to link to, skip to step 5.

2 Navigate to the location where you want to create a destination, and set the desired view.

3 In the Destinations panel, choose New Destination from the Options menu, and name the destination.

4 Save the target document.

5 In the source document (where you want to create the link), choose Tools > Advanced Editing > Link tool , and drag a rectangle to specify a location for the link.

6 In the Create Link dialog box, set the link appearance, select Go To A Page View, and then click Next.

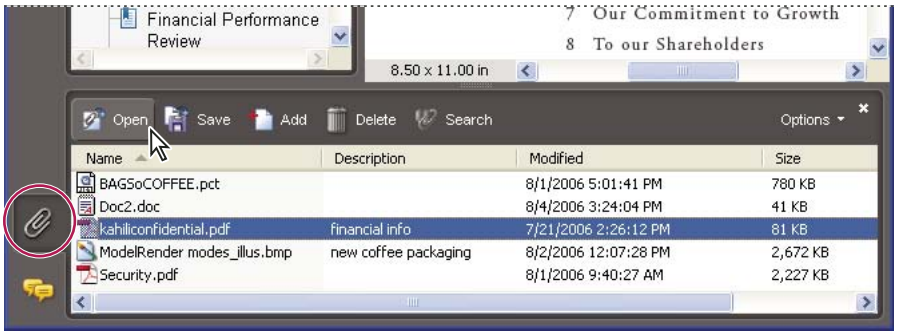
7 In the target document, in the Destinations panel, double-click the destination.

8 Save the source document.

Add an attachment

You can attach PDFs and other types of files to a PDF. If you move the PDF to a new location, the attachments move with it. Attachments may include links to or from the parent document or to other attachments.

Don't confuse attached comments with file attachments. Attached comments appear in the page with the File Attachment icon  or the Speaker icon , and in the Comments List with other comments. (See "Add comments in a file attachment" on page 180.)



Use the Attachments panel to add, delete, or view attachments.

1 Add an attachment by doing one of the following:

- Choose Document > Attach A File.
- Click the Attach A File button in the File toolbar.

Note: *The Attach A File button doesn't appear by default. To add it, right-click/Control-click the toolbar background, choose More Tools, select Attach A File located under File Toolbar, and click OK.*

2 In the Add Attachment dialog box, select the file you want to attach, and click Open.

Important: *If you try to attach certain file formats (such as EXE, VBS, or ZIP), Acrobat warns you that it won't open the file once attached because the format is associated with malicious programs, macros, and viruses that can damage your computer. To open and save file attachments that you trust, regardless of file format, set your Trust Manager preferences. See "Restrict URLs and attachments in PDFs" on page 247.*

3 To make the attachment viewable in Acrobat 5.0 or earlier, do one of the following:

- Click the Attachments button in the navigation pane, and select Show Attachments By Default from the Options menu (selected by default).
- Choose File > Properties, click the Initial View tab, choose Attachments Panel And Page from the Show menu, and click OK.

4 Save the PDF.

5 (Optional) To add a description to the attachment that helps differentiate between similar files in the Attachments panel, select the attached file, and choose Options > Edit Description. Edit the text of the description, and then save the file.

Open, save, or delete an attachment

You can open a PDF attachment and make changes to it—if you have permissions—and your changes are applied to the PDF attachment.

For other types of file attachments, you have an option of opening or saving the file. Opening the file starts the application that handles the file format of the attachment—you must have that application to open the attachment. Any changes you make are not applied to the attachment. Instead, save changes to the file, and then reattach it to the PDF document.

Note: *Acrobat requires your approval every time you open or save certain file formats (such as EXE, VBS, or ZIP) because these formats are associated with malicious programs, macros, and viruses that can damage your computer. To open and save trusted file attachments without being prompted, set your Trust Manager preferences. See "Restrict URLs and attachments in PDFs" on page 247.*

Open an attachment

❖ In the Attachments panel, select the attachment, and then click Open or choose Open Attachment from the Options menu.

Save an attachment

1 In the Attachments panel, select one or more attachments, and click Save or choose Save Attachment from the Options menu.

If you selected a single attachment, you have the option to rename the file.

2 Specify a location, and then click Save.

Delete an attachment

❖ In the Attachments panel, select an attachment, and click the Delete button or choose Delete Attachment from the Options menu.

Search in attachments

When searching for specific words or phrases, you can include PDF attachments in the search. Search results from attachments appear in the Results list beneath the attachment filename and icon. Attachments in other formats are ignored by the search engine.

Search PDF attachments from the Attachments panel

1 In the Attachments panel, click the Search Attachment button or choose Search Attachments from the Options menu. The Search PDF window opens.

2 Type the word or phrase that you want to search for, select the results option you want, and then click Search Attachments.

Search PDF attachments from the Search PDF window

1 Open the Search PDF window by doing one of the following:

- From the Find menu, choose Open Full Acrobat Search.
- Choose Edit > Search.

2 Type the word or phrase that you want to search for, and select the results option you want.

3 Click Use Advanced Search Options at the bottom of the window, and then select Include Attachments.

Actions and scripting

About Actions

You can cause an action to occur when a bookmark or link is clicked, or when a page is viewed. For example, you can use links and bookmarks to jump to different locations in a document, execute commands from a menu, and perform other actions. Actions are set in the Properties dialog box.

For bookmarks or links, you specify an action that occurs when the bookmark or link is clicked. For other items, such as pages, media clips and form fields, you define a trigger that causes the action to occur and then define the action itself. You can add multiple actions to one trigger.

The Locked option prevents the appearance and actions associated with an object from being accidentally changed.

Add an action

1 Do one of the following:

- Using the Hand tool, right-click/Control-click the bookmark or page thumbnail, and choose Properties.
- Using the Select Object tool, double-click the link, media clip, or form field, and choose Properties.

2 Click the Actions tab.

3 From the Select Action menu, select the action type to occur, and then click Add. You can add multiple actions; actions execute in the order that they appear in the Actions list box.

4 (Optional) Select an action in the Actions tab, and use the buttons to reorder, edit, or delete the action.

5 Close the window to accept the actions.

Add actions with page thumbnails

To enhance the interactive quality of a document, you can specify actions, such as changing the zoom value, to occur when a page is opened or closed.

1 Click the Pages button on the left.

2 Select the page thumbnail corresponding to the page, and choose Page Properties from the Options menu.

3 Click the Actions tab.

4 From the Select Trigger menu, choose Page Open to set an action when the page opens, or choose Page Close to set an action when the page closes.

5 Choose an action from the Select Action menu, and click Add.

6 Specify the options for the action, and click OK. The options available depend on the action selected.

7 To create a series of actions, choose another action from the menu, and click Add again. Use the Up and Down buttons to arrange the actions in the order you want them to occur.

Note: *If you set an action that switches to Full Screen view on Page Open or Page Close, the next time the same page opens or closes, Full Screen view is turned off.*

Action types

You can assign the following actions to links, bookmarks, pages, media clips, and form fields:

Execute A Menu Item Executes a specified menu command as the action.

Go To A 3D View Jumps to the specified 3D view.

Go To A Page View Jumps to the specified destination in the current document or in another document.

Import Form Data Brings in form data from another file, and places it in the active form.

Open A File Launches and opens a file. If you are distributing a PDF file with a link to another file, the reader needs the native application of that linked file to open it successfully. (You may need to add opening preferences for the target file.)

Open A Web Link Jumps to the specified destination on the Internet. You can use http, ftp, and mailto protocols to define your link.

Play A Sound Plays the specified sound file. The sound is embedded into the PDF document in a cross-platform format that plays in Windows and Mac OS.

Play Media (Acrobat 5 Compatible) Plays the specified QuickTime or AVI movie that was created as Acrobat 5-compatible. The specified movie must be embedded in a PDF document.

Play Media (Acrobat 6 And Later Compatible) Plays a specified movie that was created as Acrobat 6-compatible. The specified movie must be embedded in a PDF document.

Read An Article Follows an article thread in the active document or in another PDF document.

Reset A Form Clears previously entered data in a form. You can control the fields that are reset with the Select Fields dialog box.

Run A JavaScript Runs the specified JavaScript.

Set Layer Visibility Determines which layer settings are active. Before you add this action, specify the appropriate layer settings.

Show/Hide A Field Toggles between showing and hiding a field in a PDF document. This option is especially useful in form fields. For example, if you want an object to pop up whenever the pointer is over a button, you can set an action that shows a field on the Mouse Enter trigger and hides a field on Mouse Exit.

Submit A Form Sends the form data to the specified URL.

Trigger types

Triggers determine how actions are activated in media clips, pages, and form fields. For example, you can specify a movie or sound clip to play when a page is opened or closed. The available options depend on the specified page element.

You can use the following triggers for media clips and form fields (not links or bookmarks):

Mouse Up When the mouse button is released after a click. This is the most common button trigger, because it gives the user one last chance to drag the pointer off the button and not activate the action.

Page Visible (media clips only) When the page containing the media clip is visible, regardless of whether it is the current page. It's possible for a page to be visible without being the current page, such as when a continuous page layout displays pages side-by-side.

Page Invisible (media clips only) When the page containing the media clip is moved out of view.

Page Enter (media clips only) When the page containing the media clip becomes the current page.

Page Exit (media clips only) When a user leaves the page that contains the media clip.

Mouse Down When the mouse button is clicked (without being released). In most cases, Mouse Up is the preferred trigger.

Mouse Enter When the pointer enters the field or play area.

Mouse Exit When the pointer exits the field or play area.

On Receive Focus (media clips only) When the link area receives focus, either through a mouse action or tabbing.

On Lose Focus (media clips only) When the focus moves to a different link area.

About JavaScript in Acrobat

The JavaScript language was developed by Netscape Communications as a means to create interactive web pages more easily. Adobe has enhanced JavaScript so that you can easily integrate this level of interactivity into your PDF documents.

You can invoke JavaScript code using actions associated with bookmarks, links, and pages. The Set Document Actions command lets you create document-level JavaScript actions that apply to the entire document. For example, selecting Document Did Save runs the JavaScript after a document is saved.

You can also use JavaScript with PDF forms and batch sequences. The most common uses for JavaScript in forms are formatting data, calculating data, validating data, and assigning an action. Field-level scripts are associated with a specific form field or fields, such as a button.This type of script is executed when an event occurs, such as a Mouse Up action.

To learn how to create JavaScript scripts, download the JavaScript manuals from the Adobe website. *Developing Acrobat® Applications Using JavaScript™* contains background information and tutorials, and the *JavaScript™ for Acrobat® API Reference* contains detailed reference information. These and other JavaScript resources are located on the Adobe website.

Converted web pages

Links and bookmarks in web pages

You can work with a PDF document created from web pages the same way you work with any other PDF. Depending on how you configured Acrobat, clicking a link on a converted web page adds the page for that link to the end of the PDF, if it isn't already included.

Note: *Remember that one web page can become multiple PDF pages. A web page is a single topic (or URL) from a website and is often one continuous HTML page. When you convert a web page to PDF, it may be divided into multiple standard-size PDF pages.*

When you first create a PDF from web pages, tagged bookmarks are generated if Create Bookmarks is selected in the Web Page Conversion Settings dialog box. A standard (untagged) bookmark representing the web server appears at the top of the Bookmarks tab. Under that bookmark is a tagged bookmark for each web page downloaded; the tagged bookmark's name comes from the page's HTML title or the URL, if no title is present. Tagged web bookmarks are initially all at the same level, but you can rearrange them and nest them in family groups to help keep track of the hierarchy of material on the web pages.

If Create PDF Tags is selected when you create a PDF from web pages, structure information that corresponds to the HTML structure of the original pages is stored in the PDF. You can use this information to add tagged bookmarks to the file for paragraphs and other items that have HTML elements.

See also

"About bookmarks" on page 327

Get information on converted web pages

You can display a dialog box with the current page's URL, title, date and time downloaded, and other information.

❖ Choose Advanced > Web Capture > Page Info.

Refresh converted web pages

You can refresh web pages in a PDF to retrieve the most up-to-date version from the website. When you refresh, you download the entire website or link again and build a new PDF. The resulting new PDF lists any pages where components have changed, including text, web links, embedded filenames, and formatting. New pages are downloaded if they have been added to the site. The changed pages are listed as bookmarks in the Bookmarks panel under a bookmark labeled New And Changed Pages.

You can refresh web pages only if Save Refresh Commands was selected when the pages were first downloaded.

When you refresh web pages, both the original PDF pages and the refreshed version are retained. To keep an archive of changes made to a website, save both versions.

1 Choose Advanced > Web Capture > Refresh Pages.

2 To view new and changed pages, select Create Bookmarks For New And Changed Pages. Then specify the scope of the updated tagged bookmarks that you want to compare:

Compare Only Page Text To Detect Changed Pages Compares only the text on the pages.

Compare All Page Components To Detect Changed Pages Compares all page components, including text, images, web links, embedded filenames, and formatting.

3 To not resubmit any previously submitted form data, deselect Resubmit Form Data. Be careful if you have Resubmit Form Data selected because it can result in duplicate purchases or other submissions. This option is available only if a form and query results are on the pages.

4 To change which pages are updated by refreshing, select Edit Refresh Commands List, select the URLs you want, and click OK.

5 Click Refresh.

Compare converted pages with current web pages

❖ To open a page or web link, do one of the following:

- To open the current page in a web browser, choose Advanced > Web Capture > Open Page In Web Browser.
- To open the bookmarked page, right-click/Control-click a tagged bookmark, and choose Open Page In Web Browser.
- To open a linked page, right-click/Control-click a link in the PDF version of the web page, and choose Open Web Link In Browser.

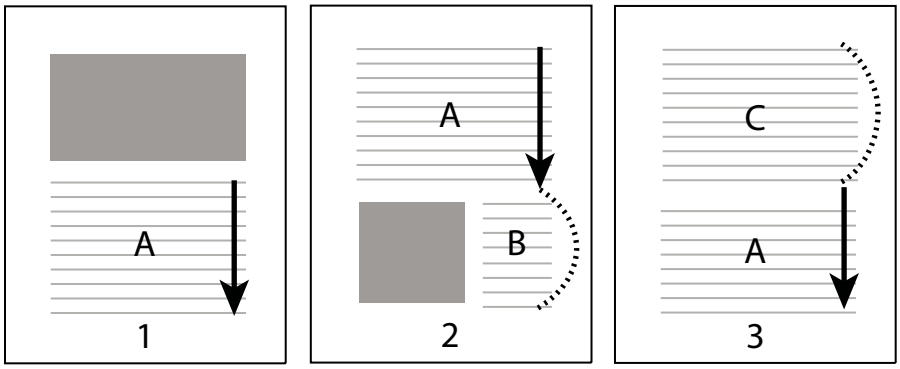
The browser opens in a new application window to the page you specify.

Articles

About articles

Many traditional print documents, such as magazines and newspapers, arrange text in multiple columns. Stories flow from column to column and sometimes across several pages. While the format is effective for printed material, this type of structure can be difficult to follow on-screen because of the scrolling and zooming required.

The article feature enables you to guide readers through material presented in multiple columns and across a series of pages.



The flow of an article thread. The user reads through text A, skips text B and C, and moves on to text A again.

Define articles

You create an article by defining a series of boxes around the content in the order in which you want the content read. The navigational path you define for an article is known as the *article thread*. You create a thread connecting the various boxes, unifying them into a continuous text flow.

Most desktop publishing programs allow you to generate article threads automatically as you convert the files to Adobe PDF. If the file you're viewing has articles, you can show the names of the articles on a tab and navigate easily through them.

1 Choose Tools > Advanced Editing > Article Tool, or select the Article tool in the Advanced Editing toolbar. The pointer appears as a cross-hair pointer in the document window.

2 Drag a rectangle to define the first article box. An article box appears around the enclosed text, and the pointer changes to the article pointer.

Each article box you create has a label that consists of the article number and its sequence within the article. For example, the first box for the first article is labeled 1-1, the second box 1-2, and so on. The boxes for the second article in the same document are labeled 2-1, 2-2, 2-3, and so on.

3 Go to the next part of the document you want to include in the article, and draw a rectangle around that text. Repeat until you have defined the entire article.

Note: *To resize or move an article box, you must first end the article.*

4 To end the article, press Enter or Return.

5 In the Article Properties dialog box, enter the article title, subject, author, and any keywords to describe the article, and click OK.

View and edit an article

Use the Article tool to create, display, and make changes to an article box in the PDF document.

View articles on the page

❖ Choose Tools > Advanced Editing > Article Tool.

View articles in the PDF

1 Choose View > Navigation Panels > Articles.

Note: *The Articles panel is a floating panel; it is not docked in the navigation pane by default. Drag the Articles panel to the navigation pane to dock it with the other panels.*

2 To read an article, double-click it, or select the article and choose Read Article from the Options menu in the Articles panel.

The first line of the article appears in the upper left corner.

3 To hide the Articles panel after the article opens, select Hide After Use in the Options menu of the Articles panel.

Delete an article or article box

❖ In the Articles panel, do one of the following:

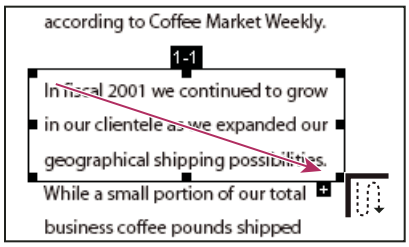
- To delete the entire article, select the article in the Articles panel, and press the Delete key.
- To delete only one box from an article, right-click/Control-click the box, and choose Delete. In the warning message, select Box. If you select Article, the entire article is deleted.

The remaining articles or article boxes are automatically renumbered.

Insert an article box into an article thread

1 In the Articles panel, select the article box that you want the new article box to follow.

2 Click the plus sign (+) at the bottom of the selected box, and click OK when prompted to drag and create a new article box.



An example of selecting an article with the Article tool

3 Draw a new article box. The new box is inserted into the article flow, and all following boxes are renumbered.

Move or resize an article box

❖ Using the Article tool, select the article box, and do one of the following:

- To move the box, drag it to the new location.
- To resize the box, drag a center handle to change only height or width, or drag a corner handle to change both dimensions.



An example of resizing an article box

Edit article properties

1 Using the Article tool, select the article box that you want to edit.

2 Right-click/Control-click the box, and choose Properties.

3 Change the information in the Articles Properties dialog box, and click OK.

Combine two articles

1 In the document pane, select any article box in the article you want to be read first.

2 Select the plus sign (+) at the bottom of the article box, and click OK to dismiss the prompt to create a new article box.

3 Ctrl-click/Option-click an article box you want to be read next. The second article is appended to the end of the first article. All article boxes in the piece are renumbered automatically.

Optimizing

PDF Optimizer

PDF Optimizer provides many settings for reducing the size of PDF files. Some of the PDF Optimizer settings are comparable to the settings that are available when you create a PDF file using Distiller. Whether you use all of these settings or only a few depends on how you intend to use the files and on the essential properties a file must have. In most cases, the default settings are appropriate for maximum efficiency—saving space by removing embedded fonts, compressing images, and removing items from the file that are no longer needed.

Before you optimize a file, it's a good idea to audit the file's space usage. The space audit results may give you ideas about where best to reduce file size. You can also reduce the size of your PDF by using the Reduce File Size command.

Important: *Some methods of compression may make images unusable in a print production workflow. You should experiment with various settings before making changes that can't be discarded.*

See also

"Reduce file size by saving" on page 47

Open the PDF Optimizer

❖ To open the PDF Optimizer dialog box, do one of the following:

- Choose Advanced > PDF Optimizer.
- Choose Advanced > Print Production > PDF Optimizer.
- Click the PDF Optimizer icon in the Print Production toolbar.

Note: *PDF Optimizer isn't available when Reflow is selected in the View menu.*

Audit the space usage of a PDF

Auditing the space usage gives you a report of the total number of bytes used for specific document elements, including fonts, images, bookmarks, forms, named destinations, and comments, as well as the total file size. The results are reported both in bytes and as a percentage of the total file size.

1 Choose Advanced > PDF Optimizer.

2 Click the Audit Space Usage button at the top of the dialog box.

Optimize a PDF

Note: *Optimizing a digitally signed document removes (and invalidates) the digital signatures.*

1 Open the PDF Optimizer dialog box.

2 To use the default settings, choose Standard from the Settings menu, and then skip to step 6. If you change any settings in the PDF Optimizer dialog box, the Settings menu automatically switches to Custom.

3 From the Make Compatible With menu, choose Retain Existing to keep the current PDF version of the file, or choose a version of Acrobat that you want the PDF to be compatible with. (The options available in panels vary depending on this choice.)

4 Select the check box next to a panel (for example, Images, Fonts, Transparency), and then select options in that panel.

5 (Optional) To save your customized settings, click the Save button and name the settings. (You can delete any saved settings by choosing it in the Settings menu and clicking the Delete button.)

6 When you are finished selecting options, click OK.

7 In the Save Optimized As dialog box, click Save to overwrite the original PDF with the optimized PDF, or select a new name or location.

To optimize a number of documents at the same time, use the Output options for the Batch Processing command.

See also

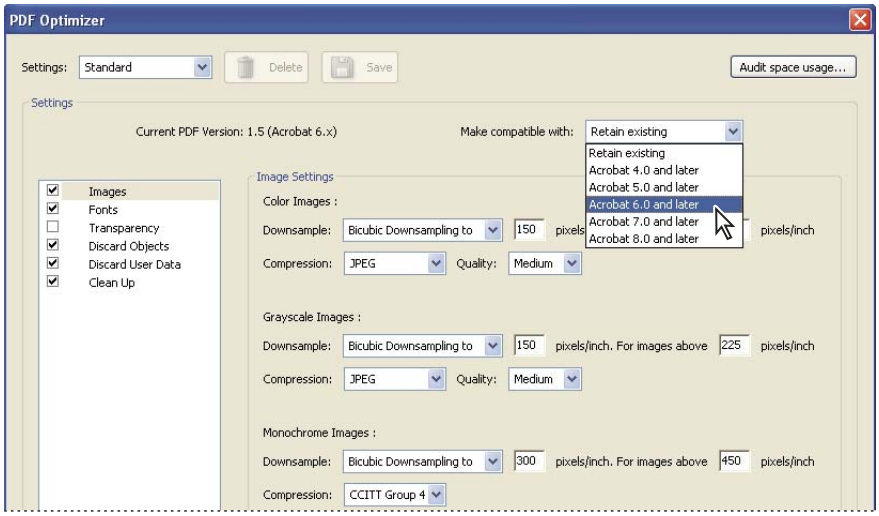
"Run a predefined batch sequence" on page 364

PDF Optimizer options

You can reduce the size of a PDF by selecting options from the panels in the PDF Optimizer dialog box.

Images panel

The Images panel of the PDF Optimizer lets you set options for color, grayscale, and monochrome image compression.



The Images panel of the PDF Optimizer dialog box. You can change the PDF compatibility in this dialog box.

In the Images panel, you can select the following options:

Downsample Reduces file size by lowering the resolution of images, which involves merging the colors of original pixels into larger pixels.

Note: *Masked images and images with a size less than 16-by-16 pixels are not downsampled.*

Compression Reduces file size by eliminating unnecessary pixel data. In general, JPEG and JPEG2000 compression give better results on images like photographs with gradual transitions from color to color. ZIP is the better choice for illustrations with large areas of solid, flat color or patterns made up of flat colors. For monochrome images, JBIG2 compression, which is available in PDF Optimizer but not in Distiller, is superior to CCITT.

Quality Can be set only for JPEG and JPEG2000 compression. JPEG and JPEG2000 compression methods are typically *lossy*, a process that permanently removes some pixel data. You can apply lossy JPEG or JPEG2000 compression to color images at various levels (minimum, low, medium, high, maximum). For JPEG2000 compression, you can also specify *lossless* so that no pixel data is removed. Compression for monochrome images is lossless, except for JBIG2 compression, which provides both lossy and lossless modes of compression.

See also

"Transparency flattening" on page 465

"Edit a flattener preset in the PDF Optimizer" on page 471

"Examine a PDF for hidden content" on page 248

Fonts panel

To ensure an exact match to the source document, you should embed all fonts used in the document. If an exact match is not needed and you prefer a smaller file, you can choose not to embed fonts for roman text and East Asian text (Traditional Chinese, Simplified Chinese, Korean, and Japanese). Text in these languages is replaced with a substitution font when viewed on a system that does not have the original fonts. The Fonts panel of the PDF Optimizer contains two lists for fonts, fonts that are available for unembedding, and fonts to be unembedded. Certain fonts aren't available for unembedding and don't appear in the Fonts panel. To unembed fonts in a document, select one or more fonts in the Embedded Fonts list, and click the Unembed button. If you change your mind about unembedding a font, select it in the list on the right and click the Retain button.

Transparency panel

If your PDF includes artwork that contains transparency, you can use presets in the Transparency panel of PDF Optimizer to flatten transparency and reduce file size. (Flattening incorporates transparency into corresponding artwork by sectioning it into vector-based areas and rasterized areas.) PDF Optimizer applies transparency options to all pages in the document before applying other optimization options.

If you select the Acrobat 4.0 And Later compatibility setting, the Transparency panel is enabled and all transparency in the file is flattened during optimization. This ensures compatibility with Acrobat 5.0 and earlier, which doesn't support transparency.

When you create flattening presets, they appear with the default presets in the Transparency panel.

Note: *Transparency flattening cannot be undone after the file is saved.*

Discard Objects panel

The Discard Objects panel lets you specify objects to remove from the PDF and lets you optimize curved lines in CAD drawings. You can discard objects created in Acrobat and in other applications. Selecting an object removes all occurrences of that object within the PDF.

In the Discard Objects area, you can select from these and other options:

Discard All Form Submission, Import And Reset Actions Disables all actions related to submitting or importing form data, and resets form fields. This option retains form objects to which actions are linked.

Flatten Form Fields Makes form fields unusable with no change to their appearance. Form data is merged with the page to become page content.

Discard All JavaScript Actions Removes any actions in the PDF that use JavaScript.

Discard All Alternate Images Removes all versions of an image except the one destined for on-screen viewing. Some PDFs include multiple versions of the same image for different purposes, such as low-resolution on-screen viewing and high-resolution printing.

Discard Embedded Page Thumbnails Removes embedded page thumbnails. This is useful for large documents, which can take a long time to draw page thumbnails after you click the Pages button.

Discard Document Tags Removes tags from the document, which also removes the accessibility and reflow capabilities for the text.

Convert Smooth Lines To Curves Reduces the number of control points used to build curves in CAD drawings, which results in smaller PDF files and faster on-screen rendering.

Detect And Merge Image Fragments Looks for images or masks that are fragmented into thin slices and tries to merge the slices into a single image or mask.

Discard Embedded Print Settings Removes embedded print settings, such as page scaling and duplex mode, from the document.

Discard Embedded Search Index Removes embedded search indexes, which reduces file size.

Discard Bookmarks Removes all bookmarks from the document.

Discard User Data panel

Use the Discard User Data panel to remove any personal information that you don't want to distribute or share with others. If you're unable to find personal information, it may be hidden. You can locate hidden text and user-related information by using the Examine Document command from the Document menu.

Discard All Comments, Forms, And Multimedia Removes all comments, forms, and multimedia from the PDF.

Discard Document Information And Metadata Removes information in the document information dictionary and all metadata streams. (Use the Save As command to restore metadata streams to a copy of the PDF.)

Discard All Object Data Removes all objects from the PDF.

Discard File Attachments Removes all file attachments, including attachments added to the PDF as comments. (PDF Optimizer doesn't optimize attached files.)

Discard External Cross References Removes links to other documents. Links that jump to other locations within the PDF are not removed.

Discard Private Data Of Other Applications Strips information from a PDF document that is useful only to the application that created the document. This does not affect the functionality of the PDF, but it does decrease the file size.

Discard Hidden Layer Content And Flatten Visible Layers Decreases file size. The optimized document looks like the original PDF but doesn't contain layer information.

Clean Up panel

The options in the Clean Up panel of the PDF Optimizer remove useless items from the document. These items include elements that are obsolete or unnecessary to your intended use of the document. Be aware that removing certain elements may seriously affect the functionality of the PDF. By default, only elements that do not affect functionality are selected. If you are unsure of the implications of removing other options, you should use the default selections.

In the Clean Up area, you can select these options:

Use Flate To Encode Streams That Are Not Encoded Applies Flate compression to all streams that aren't encoded.

In Streams That Use LZW Encoding, Use Flate Instead Applies Flate compression to all content streams and images that use LZW encoding.

Remove Invalid Bookmarks Removes bookmarks that point to pages in the document that have been deleted.

Remove Invalid Links Removes links that jump to invalid destinations.

Remove Unreferenced Named Destinations Removes named destinations that are not being referenced internally from within the PDF document. Because this option does not check for links from other PDF files or websites, it may not fit in some workflows.

Optimize The PDF For Fast Web View Restructures a PDF document for page-at-a-time downloading (byte-serving) from web servers.

Editing text and objects

Choosing a tool

A common misconception about PDF documents is that they should behave like any other document that contains images and text, letting you freely move or edit items on a page. A PDF is like a snapshot of your original document. You can perform minor touch-ups, but if your PDF requires substantial revision, it's easier to make changes to the source document and regenerate the PDF.

For editing text and objects, choose from the tools in the Advanced Editing toolbar. To insert editing marks in a PDF to indicate your changes to the original document, see "Mark up text with edits" on page 173.

The TouchUp Text tool lets you add to and replace existing text if the fonts used are available on the system. If the fonts aren't available, you can change only the appearance of existing text. However, you can add new blocks of text using the TouchUp Text tool. The Typewriter tool also lets you create new text, but provides fewer options to modify new text than the TouchUp Text tool.

Note: *Using the TouchUp Text tool may affect how the document reflows, which can make the document less accessible to the visually impaired.*

The Select Object tool provides basic editing capabilities for most objects. You can modify the size, page location, and properties of images, links, fields, and multimedia objects. You can make these same changes with the tool used to create the object.

To scale, rotate, flip, or clip an image or object (including text blocks), use the TouchUp Object tool. The TouchUp Object tool can also place images and change an object's color space (see "Convert colors to a different color space" on page 459). If you need to edit the source file for an embedded image or object, the TouchUp Object tool can start an image-editing or object-editing application.

Note: *Comments—even though they have a graphic appearance—are not considered page elements and therefore cannot be selected or manipulated using the touchup tools.*



Editing text with the TouchUp Text tool

Edit text

You can add or replace text only if the font used for that text is installed on your system. If the font isn't installed on your system but is embedded or subsetted in the PDF, you can make changes only to color, word spacing, character spacing, baseline offset, or font size.

You can edit text on rotated lines in the same way as on horizontal lines, and you can edit text using vertical fonts in the same way as text using horizontal fonts. The baseline offset or shift for vertical fonts is left and right, instead of up and down for horizontal fonts.

Edit text using the TouchUp Text tool

1 Choose Tools > Advanced Editing > TouchUp Text Tool, or select the TouchUp Text tool in the Advanced Editing toolbar.

2 Click in the text you want to edit. A bounding box outlines the selectable text.

3 Select the text you want to edit:

- Choose Edit > Select All to select all the text in the bounding box.
- Drag to select characters, spaces, words, or a line.

4 Edit the text by doing one of the following:

- Type new text to replace the selected text.
- Press Delete, or choose Edit > Delete to remove the text.
- Choose Edit > Copy to copy the selected text.
- Right-click/Control-click the text and choose the appropriate option.

Click outside the selection to deselect it and start over.

Edit text attributes

1 Select the TouchUp Text tool.

2 Click in the text you want to edit.

3 Right-click/Control-click the text, and choose Properties.

4 In the TouchUp Properties dialog box, click the Text tab. You can change any of the following text attributes:

Font Changes the font used by the selected text to the font you specify. You can select any font installed on your system or fully embedded in the PDF document. Document fonts are listed at the top; system fonts are listed below.

Font Size Changes the font size to the size (in points) that you specify.

Character Spacing Inserts uniform spacing between two or more characters in selected text.

Word Spacing Inserts uniform spacing between two or more words in selected text.

Horizontal Scaling Specifies the proportion between the height and the width of the type.

Baseline Offset Offsets the text from the baseline. The *baseline* is the line on which the type rests.

Fill Specifies the fill color.

Stroke Specifies the stroke color.

Stroke Width Specifies the width of the stroke.

Note: *For legal reasons, you must have purchased a font and have it installed on your system to revise text using that font.*

Add new text

You can add new text to a PDF using any of the fonts installed on the system.

1 Select the TouchUp Text tool.

2 Ctrl-click/Option-click where you want to add text.

3 In the New Font dialog box, select the font and mode you want, and click OK.

4 Type the new text.

5 Do any of the following:

- To change the font size and other attributes, select the text, right-click/Control-click, and choose Properties.
- To move the text block, use the TouchUp Object tool.

Add text using the Typewriter tool

Use the Typewriter tool to type text anywhere on a PDF page. Organizations sometimes provide PDF versions of their paper forms without interactive form fields. The Typewriter tool provides a simple solution for filling out such forms. The Typewriter tool is similar to the Text Box tool, but includes a different set of default properties.

1 Choose Tools > Typewriter > Show Typewriter Toolbar, and then click the Typewriter button.

2 Click where you want to type, and then begin typing. Press Enter to add a second line.

3 To change the text size, select the text, and click the Decrease Text Size button or the Increase Text Size button in the Typewriter toolbar.

4 To change the line spacing (leading), select the text, and click the Decrease Line Spacing button or the Increase Line Spacing button.

5 To move or resize Typewriter text block, select the Select tool, click a Typewriter text block, and drag the text block or one of its corners.

6 To edit the text again, select the Typewriter tool, and then double-click in the Typewriter text.

Note: *To let Reader users type text in a PDF by using the Typewriter tool, open the PDF in Acrobat Professional, choose Tools > Typewriter > Enable Typewriter Tool In Adobe Reader, and save the PDF.*

Insert special characters

You can insert certain special characters (line breaks, soft hyphens, nonbreaking spaces, and em dashes) in a tagged PDF to improve the way it reflows. You can also insert these special characters in any PDF to improve the way it's read by a screen reader or simply to edit it for general readability purposes. You do not need to have the font installed in order to insert special characters.

1 Select the TouchUp Text Tool.

2 Click where you want to insert the character, or select text to be replaced by the character.

3 Right-click/Control-click the selected text or location, choose Insert and then select an option.

See also

"Reflow a PDF" on page 297

Embed fonts using the TouchUp Text tool

Embedding fonts ensures that your PDF uses the same fonts as the original document, no matter where you open the PDF or what fonts are installed on that system.

1 Choose Tools > Advanced Editing > TouchUp Text Tool, or select the TouchUp Text tool in the Advanced Editing toolbar.

2 Click in the text containing the font embedding or subsetting you want to edit. A paragraph of text is enclosed in a bounding box. You can select text within the paragraph by dragging.

3 Right-click/Control-click the text, and choose Properties.

4 In the TouchUp Properties dialog box, click the Text tab to display the font name and font properties as well as embedding and subset capabilities.

5 To see a list of all the fonts, scroll through the Font menu. Document fonts are listed first. Your system fonts are listed below the document fonts.

6 Choose a font in the Font menu, check the permissions to determine which options are available for that font, and then select an embedding option:

Can Embed Font You can select both the embed and subset options. To embed the entire font rather than a subset, make sure that Subset is not selected.

Can Embed Font For Print And Preview Only You can only subset-embed the font. You can embed the font for print and preview but not for editing.

Cannot Embed Font Neither the embed nor subset option is available.

No System Font Available Neither the embed nor subset option is available.

See also

"Fonts" on page 113

Place an image or object

1 Choose Tools > Advanced Editing > TouchUp Object Tool .

2 Right-click/Control-click the page and choose Place Image.

3 Choose one of the following file formats: BMP, GIF, JPEG, PCX, PNG, EPS/PS, or TIFF.

4 Select an image file, and click Open.

A copy of the image file appears in the center of the page, at the same resolution as the original file.

Move or edit an object

A selected object usually shows a bounding box. Selection handles appear when the pointer is over the object. When the pointer is over a locked object, no selection handles appear. When you select multiple objects, the last object you select becomes the anchor and appears red; the others appear blue. The anchor object remains stationary during alignment operations.

To make another object in the selection the anchor object, Ctrl-click/Option-click the new target object twice, once to remove the object from the selection, and once to add it back to the selection. As the last object added to the selection, it becomes the anchor object.

When objects of the same type are selected and the selection covers multiple pages, you can change the appearance of the objects but not move them.

When you edit a text box, the entire text box is selected; however, the TouchUp Object tool cannot select individual characters that are part of larger text blocks. You must use the TouchUp Text tool to edit individual characters and words.

Use the Select Object tool to select and move objects such as form fields and links.

Use the TouchUp Object tool to select and move placed images, text blocks, and embedded objects.

Select an object

1 Select one or more objects:

- Click the object with the TouchUp Object tool (Tools > Advanced Editing).
- Click the object with the Select Object tool, or with the tool you used to create the object.
- Right-click/Control-click the object and choose Select All from the context menu. If the Select Object tool is active and the document uses single-page layout, all objects on the current page are selected. If the document is in any other page layout, all objects in the document are selected. If a tool in the Advanced Editing toolbar is active, all objects of that type in the document are selected.
- Drag to create a rectangle around the desired objects. If the Select Object tool is active, all objects within the rectangle are selected. If an Advanced Editing tool is active, press Ctrl as you drag; all objects of the tool type within the rectangle are selected.

2 (Optional) Add one or more objects to the current selection:

- Ctrl-click/Option-click an object.
- Shift-click to add a range of objects. (The Select Object tool includes all objects when you Shift-click.) Using Shift selects all items that lie within the rectangular bounding box formed by all items in the selection (including the item that was just added).

Move an object

1 Click the object with the TouchUp Object tool, the Select Object tool, or the tool used to create the object.

2 Move the image or object:

- Drag the object to the desired location. Objects cannot be dragged to a different page (you can cut and paste them to a new page instead). Shift-drag the object to constrain movement up or down, or right or left.

- Right-click/Control-click the image and choose an option to move the image on the page.

Resize an object

1 Click the object with the TouchUp Object tool, the Select Object tool, or with the tool used to create it.

2 Drag a handle of the object. Shift-drag the handle to retain the original aspect ratio.

Clip an object

1 Select the TouchUp Object tool.

2 Right-click/Control-click the object, and choose Set Clip. When you hold the pointer over the selection, the clipping icon appears.

3 Drag a selection handle in the direction you want until the clip rectangle displays the results you want.

4 Click inside the selection to exit the clipping mode.

Edit an object using the TouchUp Object tool

1 Choose Tools > Advanced Editing > TouchUp Object tool.

2 Select the object, right-click/Control-click the selection, and choose one of the following:

Place Image Embeds an image file in the PDF.

Set Clip Sets a clipping region for the object, if one exists.

Delete Clip Delete Clip deletes objects that are clipping the selected object. For example, if you scale text and the resulting characters are clipped, selecting this option shows you the complete characters. This option appears only if you chose Set Clip.

Flip Horizontal, Flip Vertical Flip Horizontal flips the image horizontally, on the vertical axis. Flipping text blocks horizontally creates a mirror effect. Flip Vertical flips the image vertically, on the horizontal axis.

Create Artifact Removes the object from the reading order so it isn't read by a screen reader or the Read Out Loud command.

Edit Image, Edit Object Starts the image editor or object editor you specify in the TouchUp preferences. Edit Image is available when a vector image is selected; Edit Object is available when a bitmap image is selected. Selecting these options removes tags from the PDF, potentially changing how the PDF reflows and affecting accessibility. For example, changing the location of an object affects the order in which that object (or its alternate text) is read by a screen reader.

Rotate Clockwise, Rotate Counterclockwise, Rotate Selection Rotate Clockwise and Rotate Counterclockwise rotate the selected object ninety degrees in the indicated direction. Rotate Selection lets you rotate the selection incrementally by dragging a selection handle in the direction you choose. You must click inside the selection to exit the rotate mode.

TouchUp Properties Lets you edit properties for the content, tag, and text, such as adding alternate text to an image to make it accessible.

Start an image editor using the TouchUp Object tool

By default, the TouchUp Object tool starts Adobe Photoshop (if installed) to edit images and objects. To use a different editing application, specify the application in the TouchUp preferences. Choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and select TouchUp on the left side of the Preferences dialog box. Click Image Editor (for bitmap images) or Page/Object Editor, (for vector images) and select the application on your hard drive.

1 Using the TouchUp Object tool, select the image or object or Shift-click to select multiple images or objects. If you change the object selection, the editing session terminates.



To edit all the images and objects on the page, right-click/Control-click the page, and choose Edit Page.

2 Right-click/Control-click the selection, and choose Edit Image or Edit Object. (The available command depends on what is selected.)

***Note:** If the image can't open in Adobe Photoshop, verify that Photoshop is configured correctly. If a message asks whether to convert to ICC profiles, choose Don't Convert. If the image window displays a checkerboard pattern when it opens, the image data could not be read.*

3 Make the desired changes in the external editing application.

4 If you are working in Photoshop, flatten the image.

If you change the dimensions of the image in Photoshop, the image may not align correctly in the PDF. Also, transparency information is preserved only for masks that are specified as index values in an indexed color space. Image masks are not supported. If you change image modes while editing the image, you may lose valuable information that can be applied only in the original mode.

5 In the editing application, choose File > Save. The object is automatically updated and displayed in the PDF when you bring Acrobat to the foreground.

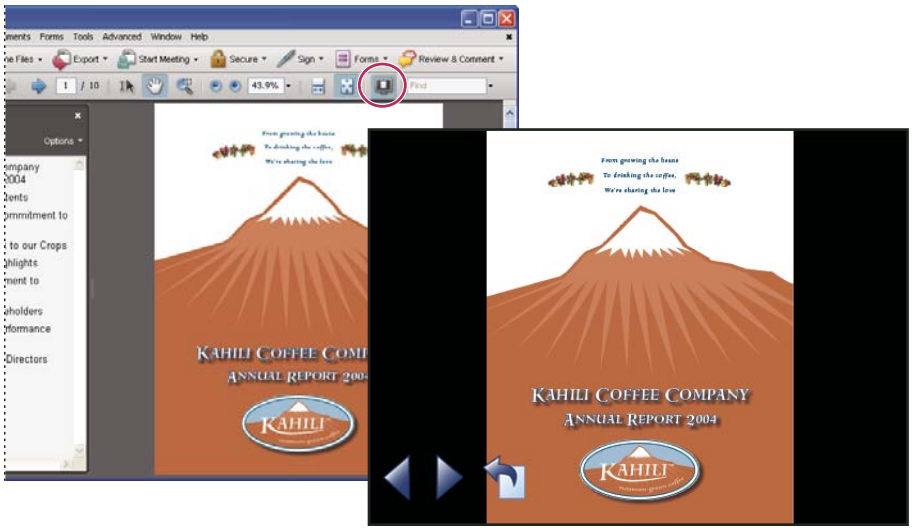
***Important:** For Photoshop, if the image is in a format supported by Photoshop 6.0 or later, your edited image is saved back into the PDF. However, if the image is in an unsupported format, Photoshop handles the image as a generic PDF image, and the edited image is saved to disk instead of back into the PDF.*

Setting up a presentation

Defining initial view as Full Screen mode

Full Screen mode is a property you can set for PDFs used for presentations. In Full Screen mode, PDF pages fill the entire screen, and the Acrobat menu bar, toolbar, and window controls are hidden. You can also set other opening views, so that your documents or collections of documents open to a consistent view. In either case, you can add page transitions to enhance the visual effect as the viewer pages through the document.

To control how you navigate a PDF (for example, advancing pages automatically), use the options in the Full Screen preferences. These preferences are specific to a system—not a PDF document—and affect all PDFs that you open on that system. Therefore, if you set up your presentation on a system you control, you can control these preferences. To set the Full Screen preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and select Full Screen on the left.



Use the Full Screen button (circled) to view and navigate PDFs as a slide show.

Define an initial view

When a user opens your PDF document or PDF package, they see the initial view of the PDF. You can set the initial view to the magnification level, page, and page layout that you want to have appear. If your PDF is a presentation, you may want to set the initial view to Full Screen mode.

After you define the initial view of the PDF, you can add page transitions to selected pages or the entire document.

Acrobat supports page transitions and bullet fly-ins from PowerPoint.

Define the initial view

1 Choose File > Properties.

2 In the Document Properties dialog box, click Initial View.

3 Select the options you want, and then click OK. You have to save and reopen the file to see the effects.

Define the initial view as Full Screen mode

When setting the initial view of a PDF to Full Screen mode, you must define how the document opens.

1 Choose File > Properties.

2 In the Document Properties dialog box, select Initial View.

3 For best results, do the following:

- Choose Page Only from the Navigation Panel menu.
- Choose Single Page from the Page Layout menu.
- Set Open To Page to the page on which you want to start the presentation.

4 Select Open In Full Screen Mode to open the document without the menu bar, toolbar, or window controls displayed. Click OK. (You have to save and reopen the file to see the effects.)

Note: *Users can exit Full Screen mode by pressing Esc if their preferences are set this way. However, in Full Screen mode, users cannot apply commands and select tools unless they know the keyboard shortcuts. You may want to set up page actions in the document to provide this functionality.*

Initial View options for document properties

The Initial View options in the Document Properties are organized into three areas: Layout And Magnification, Window Options, and User Interface Options.

Layout And Magnification Determines the appearance of the document.

- **Navigation Panel** Determines which panels are displayed in the navigation pane.
- **Page Layout** Determines how document pages are arranged.
- **Magnification** Sets the zoom level the document will appear at when opened. Default uses the magnification set by the user.
- **Open To Page** Specifies the page that appears when the document opens.

Note: *Setting Default for the Magnification and Page Layout options uses the individual users' settings in the Page Display preferences.*

Window Options Determine how the window adjusts in the screen area when a user opens the document. These options apply to the document window itself in relationship to the screen area of the user's monitor.

- **Resize Window To Initial Page** Adjusts the document window to fit snugly around the opening page, according to the options that you selected under Document Options.
- **Center Window On Screen** Positions the window in the center of the screen area.
- **Open In Full Screen Mode** Maximizes the document window and displays the document without the menu bar, toolbar, or window controls.
- **Show File Name** Shows the filename in the title bar of the window.
- **Show Document Title** Shows the document title in the title bar of the window. The document title is obtained from the Description panel of the Document Properties dialog box.

User Interface Options Determine which parts of the interface—the menu bar, the toolbars, and the window controls—are hidden.

Note: *If you hide the menu bar and toolbars, users cannot apply commands and select tools unless they know the keyboard shortcuts. You may want to set up page actions that temporarily hide interface controls while the page is in view. (See "Add actions with page thumbnails" on page 337.)*

Add page transitions

You can create an interesting effect that occurs each time a page advances by using page transitions.

You can also set page transitions for a group of documents using the Batch Processing command.

1 Do one of the following:

- Choose Advanced > Document Processing > Page Transitions.
- In the Pages panel, select the page thumbnails you want to apply transitions to, and choose Page Transitions from the Options menu.

2 In the Set Transitions dialog box, choose a transition effect from the Transition menu. These transition effects are the same as those set in the Full Screen preferences.

3 Choose the direction in which the transition effect occurs. Available options depend on the transition.

4 Choose the speed of the transition effect.

5 Select Auto Flip, and enter the number of seconds between automatic page turning. If you do not select this option, the user turns pages using keyboard commands or the mouse.

6 Select the Page Range you want to apply transitions to.

Note: *If users select Ignore All Transitions in the Full Screen preferences, they do not see the page transitions.*

Document properties and metadata

View document properties

When you view a PDF, you can get information about it, such as the title, the fonts used, and security settings. Some of this information is set by the person who created the document, and some is generated automatically.

You can change any information that can be set by the document creator, unless the file has been saved with security settings that prevent changes.

1 Choose File > Properties.

2 Click a tab in the Document Properties dialog box.

See also

"Securing PDFs" on page 263

"Create print presets" on page 428

Document Properties

Description Shows basic information about the document. The title, author, subject, and keywords may have been set by the person who created the document in the source application, such as Word or InDesign, or by the person who created the PDF. You can search for these description items in Acrobat to find particular documents. The Keywords section can be particularly useful for narrowing searches.

Note that many search engines use the title to describe the document in their search results list. If a PDF does not have a title, the filename appears in the results list instead. A file's title is not necessarily the same as its filename.

The Advanced area shows the PDF version, the page size, number of pages, whether the document is tagged, and if it's enabled for Fast Web View. (The size of the first page is reported in PDFs or PDF packages that contain multiple page sizes.) This information is generated automatically and cannot be modified.

Security Describes what changes and functionality are allowed within the PDF. If a password, certificate, or security policy has been applied to the PDF, the method is listed here.

Fonts Lists the fonts and the font types used in the original document, and the fonts, font types, and encoding used to display the original fonts.

If substitute fonts are used and you aren't satisfied with their appearance, you may want to install the original fonts on your system or ask the document creator to re-create the document with the original fonts embedded in it.

Initial View Describes how the PDF appears when it's opened. This includes the initial window size, the opening page number and magnification level, and whether bookmarks, thumbnails, the toolbar, and the menu bar are displayed. You can change any of these settings to control how the document appears the next time it is opened.

Custom Lets you add document properties to your document.

Advanced Lists PDF settings, print dialog presets, and reading options for the document.

In the PDF settings, you can set a base Uniform Resource Locator (URL) for web links in the document. Specifying a base URL makes it easy for you to manage web links to other websites. If the URL to the other site changes, you can simply edit the base URL and not have to edit each individual web link that refers to that site. The base URL is not used if a link contains a complete URL address.

You can also associate a catalog index file (PDX) with the PDF. When the PDF is searched with the Search PDF window, all of the PDFs that are indexed by the specified PDX file are also searched.

You can include prepress information, such as trapping, for the document. You can define print presets for a document, which prepopulate the Print dialog box with document-specific values. You can also set reading options that determine how the PDF is read by a screen reader or other assistive device.

Add a description to Document Properties

You can add keywords to the document properties of a PDF that other people might use in a search utility to locate the PDF.

1 Choose File > Properties.

2 Click the Description tab, and type the author's name, subject, and keywords.

3 (Optional) Click Additional Metadata to add other descriptive information, such as copyright information.

Create document properties

You can add custom document properties that store specific types of metadata, such as the version number or company name, in a PDF. Properties you create appear in the Document Properties dialog box. Properties you create must have unique names that do not appear in the other tabs in the Document Properties dialog box.

1 Choose File > Properties, and then select Custom.

2 To add a property, type the name and value, and then click Add.

3 To change the properties, do any of the following, and then click OK:

- To edit a property, select it, change the Value, and then click Change.
- To delete a property, select it and click Delete.

To change the name of a custom property, delete the property and create a new custom property with the name you want.

Edit document metadata

PDF documents created in Acrobat 5.0 or later contain document metadata in XML format. Metadata includes information about the document and its contents, such as the author's name, keywords, and copyright information, that can be used by search utilities. The document metadata contains (but is not limited to) information that also appears in the Description tab of the Document Properties dialog box. Document metadata can be extended and modified using third-party products.

The Extensible Metadata Platform (XMP) provides Adobe applications with a common XML framework that standardizes the creation, processing, and interchange of document metadata across publishing workflows. You can save and import the document metadata XML source code in XMP format, making it easy to share metadata among different documents. You can also save document metadata to a metadata template that you can reuse in Acrobat.

View document metadata

1 Choose File > Properties, and click the Additional Metadata button in the Description tab.

2 Click Advanced to display all the metadata embedded in the document. (Metadata is displayed by schema—that is, in predefined groups of related information.) Display or hide the information in schemas by clicking the plus or minus sign (Windows) or arrows (Mac OS) next to the schema name. If a schema doesn't have a recognized name, it is listed as Unknown. The XML name space is contained in parentheses after the schema name.

Edit or append document metadata

1 Choose File > Properties, click the Description tab, and then click Additional Metadata.

2 Select Advanced from the list on the left.

3 To edit the metadata, do any of the following, and then click OK.

- To add previously saved information, click Append, select an XMP or FFO file, and click Open.
- To add new information and replace the current metadata with information stored in an XMP file, click Replace, select a saved XMP or FFO file, and click Open. New properties are added, existing properties that are also specified in the new file are replaced, and existing properties that are not in the replacement file remain in the metadata.
- To delete an XML schema, select it and click Delete.
- To append the current metadata with metadata from a template, hold down Ctrl/Command (and choose a template name from the dialog box menu in the upper right corner.

Note: *You must save a metadata template before you can import metadata from a template.*

- To replace the current metadata with a template of metadata, choose a template file (XMP) from the dialog box menu in the upper right corner.

Save metadata as a template or file

1 Choose File > Properties, click the Description tab, and then click Additional Metadata.

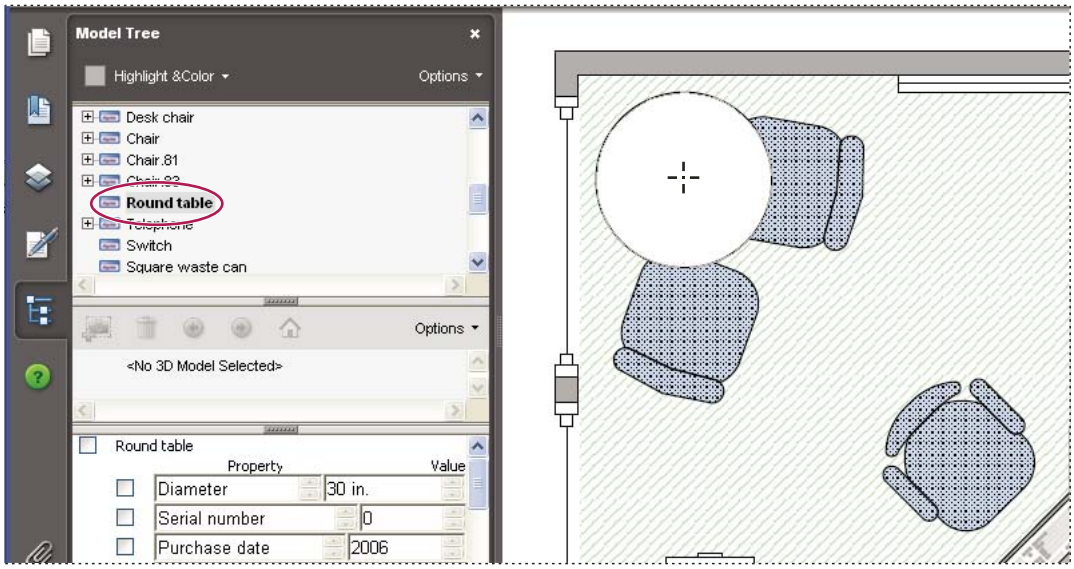
2 Select Advanced from the list on the left.

3 Save the document metadata, and then click OK:

- To save the metadata to an external file, click Save and name the file. The metadata is stored as a file in XMP format. (To use the saved metadata in another PDF, open the document and use these instructions to replace or append metadata in the document.)
- To save the metadata as a template, choose Save Metadata Template from the dialog box menu in the upper right corner, and name the file.

View object data and metadata

You can view the metadata information of certain objects, tags, and images within a PDF. You can edit and export metadata for Visio objects only.



Use the Object Data tool to view object grouping and object data.

See also

"Find text in multiple PDFs" on page 371

View object metadata

1 Choose Tools > Advanced Editing > TouchUp Object tool.

2 Select an object, right-click/Control-click the selection, and choose Show Metadata. (If Show Metadata is unavailable, the image has no metadata associated with it.)

View and edit Visio object metadata

1 Choose Tools > Object Data > Object Data Tool.

2 Double-click an object on the page to show its metadata.

The Model Tree opens and shows a hierarchical list of all structural elements. The selected object's metadata appears as editable properties and values at the bottom of the Model Tree.

The selected object is highlighted on the page. Use the Highlight Color menu at the top of the Model Tree to choose a different color.

3 To edit the metadata, type in the boxes at the bottom of the Model Tree. To save your changes, choose Write Back from the Options menu at the top of the Model tree.

4 To export object metadata, choose Export To XML > Whole Tree to export all objects in the Model Tree, or choose Export To XML > Current Node to export only the selected object and its children. Name and save the file.

Export Visio object metadata

1 Choose Tools > Object Data > Object Data Tool.

2 Double-click an object on the page to show its metadata.

3 In the Options menu at the top of the Model Tree, do one of the following:

- Choose Export As XML > Whole Tree to export all objects.

- Choose Export As XML > Current Node to export only the selected object and its children.

4 Name and save the file.

Layers

About PDF layers

Acrobat supports viewing, navigating, and printing layered content in PDFs created from applications such as InDesign, AutoCAD, and Visio.

You can control the display of layers using the default and initial state settings. For example, if your document contains a copyright notice, you can easily hide the layer containing that notice whenever the document is displayed on-screen while ensuring that the layer always prints.

You can rename and merge layers, change the properties of layers, and add actions to layers. You can also lock layers to prevent them from being hidden.

Acrobat does not allow you to author layers that change visibility according to the zoom level. However, you can highlight a portion of a layer that is especially important by creating a bookmark that magnifies or hides the layer using page actions. You can also add links that let users click a visible or invisible link to navigate to or zoom in on a layer.

To retain layers when you convert InDesign CS or later documents to PDF, make sure that Compatibility is set to Acrobat 6 (PDF 1.5) and that Create Acrobat Layers is selected in the Export PDF dialog box.

Show or hide layers

Information can be stored on different layers of a PDF. The layers that appear in the PDF are based on the layers created in the original application. You cannot create layers in Acrobat; however, you can examine layers and show or hide the content associated with each layer using the Layers panel in the navigation pane. Items on locked layers cannot be hidden.

Note: *A Lock icon in the Layers panel indicates that a layer is for information only. Locked layers can be created from AutoCAD and Visio files. Use the Layer Properties dialog box to change the visibility of a locked layer.*



Layers panel
***A.** Eye icon indicates a displayed layer **B.** Locked layer **C.** Hidden layer*

1 Choose View > Navigation Panels > Layers, and then do one of the following:

- To hide a layer, click the eye icon. To show a hidden layer, click the empty box. (A layer is visible when the eye icon is present, and hidden when the eye icon is absent. This setting temporarily overrides the settings in the Layer Properties dialog box.)
- To show or hide multiple layers, choose an option from the Options menu in the Layers panel.

2 From the Options menu in the Layers panel, choose one of the following:

List Layers For All Pages Shows every layer across every page of the document.

List Layers For Visible Pages Shows layers only on the currently visible pages.

Reset To Initial Visibility Resets layers to their default state.

Apply Layer Overrides Displays all layers. This option affects all optional content in the PDF, even layers that are not listed in the Layers panel. All layers are visible, regardless of the settings in the Layer Properties dialog box. You cannot change layer visibility using the eye icon until you deselect this command. You can edit layer properties in the Layer Properties dialog box, but changes (except changes to the layer name) are not effective until you choose Reset To Initial Visibility in the Options menu.

***Note:** You cannot save the view of a layered PDF by using the eye icon in the Layers panel to show and hide layers. When you save the file, the visibility of the layers automatically reverts to the initial visibility state.*

If you want to save a different view of a layered PDF, you must change the default state of the layers in the Layer Properties dialog box.

Edit layer properties

You can combine the default state setting, the visibility setting, and the print setting to control when a layer is visible and when it prints. If a layer contains a watermark, for example, you may want the layer to not show on-screen but always to print and always to export to other applications. In this case you can set the default state to on, the initial visibility to never visible (the image doesn't show on-screen), and the initial print and initial export states to always print and always export. The layer need not be listed in the Layers panel, since all the state changes are handled automatically.

***Note:** The settings in the Layer Properties dialog box take effect only if Allow Layer State To Be Set By User Information is selected in the Documents preferences. If it is not selected, Layer Properties dialog box settings, other than Layer Name and Default State, are ignored.*

1 Click the Layers button in the navigation pane.

2 Select a layer, and choose Layer Properties from the Options menu.

3 In the Layer Properties dialog box, edit the layer name or any of the following properties, and then click OK:

Default State Defines the initial visibility state of the layer when a document is first opened or when the initial visibility is reset. The eye icons for layers are initially shown or hidden based on this value. For example, if this value is set to off, the eye icon for a layer is hidden when the document is first opened or when Reset To Initial Visibility is chosen from the Options menu.

Intent Select View to allow the layer to be turned on or off, or select Reference to keep the layer on at all times and permit editing of the properties. When the Reference Intent option is selected, the layer appears in italics.

Visibility Defines the on-screen visibility of the PDF layer. You can show a layer when the document is opened, you can hide a layer when the document is opened, or you can let the default state determine whether a layer is shown or hidden when the document is opened.

Print Determines whether a layer will print.

Export Determines whether the layer appears in the resulting document when the PDF file is exported to an application or file format that supports layers.

Any additional properties that the creator of the layered PDF has associated with a specific layer are shown in the box at the bottom of the Layer Properties dialog box.

Add layer navigation

You can add links and destinations to layers, allowing you to change the view of a document when the user clicks a bookmark or link.

***Note:** In general, changes to layer visibility made using the eye icon in the Layers panel are not recorded in the Navigation toolbar.*

Associate layer visibility with bookmarks

1 Set the required layer properties, visibility, and magnification level for the target PDF layer in the document pane.

2 Click the Bookmarks button, and choose New Bookmark from the Options menu.

3 Select the new bookmark, and choose Properties from the Options menu.

4 In the Bookmark Properties dialog box, click the Actions tab.

5 For Select Action, choose Set Layer Visibility, click Add, and then click OK.

6 Select the bookmark label in the Bookmarks panel, and name the bookmark.

Associate layer visibility with a link destination

1 Set the required layer properties for the destination in the document pane.

2 Choose View > Navigation Panels > Destinations.

The Destinations panel appears in a floating panel. You can add it to the other panels by dragging it to the navigation pane. If the panel is collapsed, click the Destinations button to expand it.

3 Click the Create New Destination button or select New Destination from the Options menu, and name the destination.

4 Select the Link tool, and drag in the document pane to create a link. (Because content is added to all layers, it doesn't matter that you are apparently creating the link on the target layer. The link works from any layer.)

5 In the Create Link dialog box, select Custom Link and click Next.

6 Click the Appearance tab in the Link Properties dialog box, and set the appearance of the link.

7 Click the Actions tab in the Link Properties dialog box, choose Set Layer Visibility, and click Add.

8 Close the dialog boxes.

You can test the link by changing the layer settings, selecting the Hand tool, and clicking the link.

Merge or flatten layers

Merged layers acquire the properties of the layer into which they are merged (the target layer). Flattening PDF layers hides any content that is not visible when the flattening operation is executed and consolidates all layers.

Important: *You cannot undo either a merging or a flattening operation.*

Merge layers

1 Click the Layers button, and select Merge Layers from the Options menu.

2 In the left pane (Layers To Be Merged), select one or more layers to be merged. Ctrl-click/Command-click to select multiple layers, and click Add. Click Add All to merge all layers.

3 To remove a layer from the center panel, select the layer or layers. Ctrl-click/Command-click to select multiple layers. When your selection is complete, click Remove.

4 In the right pane (Layer To Be Merged Into), select the layer into which to merge the selected layers, and click OK.

Flatten layers

❖ Click the Layers button, and select Flatten Layers from the Options menu.

Editing layered content

You can select or copy content in a layered PDF document using the Select tool or the Snapshot tool. You can edit content using a touchup tool. These tools recognize and select any content that is visible, regardless of whether the content is on a selected layer.

If the content that you edit or delete is associated with one layer, the content of the layer reflects the change. If the content that you edit or delete is associated with more than one layer, the content in all the layers reflects the change. For example, if you want to change a title and byline that appear on the same line on the first page of a document, and the title and byline are on two different visible layers, editing the content on one layer changes the content on both layers.

You can add content, such as review comments, stamps, or form fields, to layered documents just as you would to any other PDF document. However, the content is not added to a specific layer, even if that layer is selected when the content is added. Rather, the content is added to the entire document.

You can use the Create PDF From Multiple Files command to combine PDF documents that contain layers. The layers for each document are grouped under a separate heading in the Layers panel of the navigation pane. You expand and collapse the group by clicking the icon in the title bar for the group.

See also

“Move or edit an object” on page 351

Processing in batches

About batch sequences

When you apply one or more routine sets of commands to your files, you can save time and keystrokes by using an automated *batch sequence*—a defined series of commands with specific settings and in a specific order that you apply in a single step. You can apply a sequence to a single document, to several documents, or to an entire collection of documents.

You can use the batch sequences provided or define your own. Batch sequences that you define appear (in alphabetical order) in the list of predefined sequences so that you can reuse them in later work sessions.

Developers can further enhance batch processing and other robust capabilities in Acrobat by using the Acrobat Software Development Kit (SDK) to create scripts and plug-ins for their particular needs. For more information, see the Acrobat Developer Center (English only).

Run a predefined batch sequence

Acrobat includes a number of simple, predefined batch sequences that you can use to streamline your work. These batch sequences represent common tasks that you routinely need to perform to prepare files for distribution. You do not have to open any of the PDF files before you begin to run these batch sequences.

You can avoid password prompts when you run a sequence on PDFs that require passwords by automating password entry, or by specifying a security method for these files in the Batch Processing preferences. If you select Do Not Ask For Password, PDFs that require passwords won't be processed. To open the Batch Processing preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS).

1 Choose Advanced > Document Processing > Batch Processing.

2 In the Batch Sequences dialog box, select a batch sequence, and then click the Run Sequence button.

3 In the Run Sequence Confirmation dialog box, verify that the sequence you selected is the one you want, and click OK.

To prevent this dialog box from appearing in the future, deselect the Show The Run Sequence Confirmation Dialog option in the Batch Processing preferences after you complete this procedure.

4 In the Select Files To Process dialog box, select the files that you want, and then click Select. (In Windows, these files must be in the same folder.)

5 If a message asks for additional input for a specific command in the sequence, select the options you want and click OK.

6 When the progress bar disappears, click Close.

You can click Stop in the Progress dialog box to stop processing. The Progress dialog box expands automatically to show the percentage of completion and any error or warning messages. Any files already processed are saved as defined in the batch sequence. When the Progress dialog box closes, errors are automatically written to the batch-processing error log, depending on the selections in the Batch Preferences dialog box.

Predefined batch sequences

Embed Page Thumbnails Embeds miniature images of each page for display in the Pages panel.

Fast Web View Enables users to download long documents incrementally.

Open All Opens all the specified files. This batch sequence creates PDFs for any input files if they are a supported file type.

Print 1st Page Of All Prints only the first page of each of the PDFs in the batch sequence. The pages print on your default printer, using your current default print settings.

Print All Prints all pages of the files included in the batch sequence. The files print on your default printer, using your current default print settings.

Remove File Attachments Removes files that have been attached to the PDF files in the batch sequence.

Save All As RTF Saves the files in Rich Text Format (RTF).

Set Security To No Changes Limits access to a PDF by setting up passwords and restricting certain features, such as editing.

Modify a batch sequence

You can add, rearrange, and delete commands in the batch sequence definitions to suit your work requirements. You can also edit the options for individual commands in the batch sequence or add interactive pauses at strategic points in the batch processing.

Any changes you make to a predefined batch sequence are automatically saved as a part of the sequence. To restore the predefined batch sequence to its default settings, you must manually remove any changes you made to it. If you require a sequence of complex or highly customized commands, consider creating a new batch sequence.

Edit a batch sequence

1 Choose Advanced > Document Processing > Batch Processing, select the batch sequence, and click Edit Sequence.

2 In the Edit Sequence dialog box, click Select Commands.

3 To modify the sequence of commands, do any of the following:

- To add a command to the sequence, select it in the list on the left and click Add to move it to the list on the right.
- To delete a command from the sequence, select it on the right and click Remove.
- To change the order in which the commands are applied, select a command, and click Move Up or Move Down.

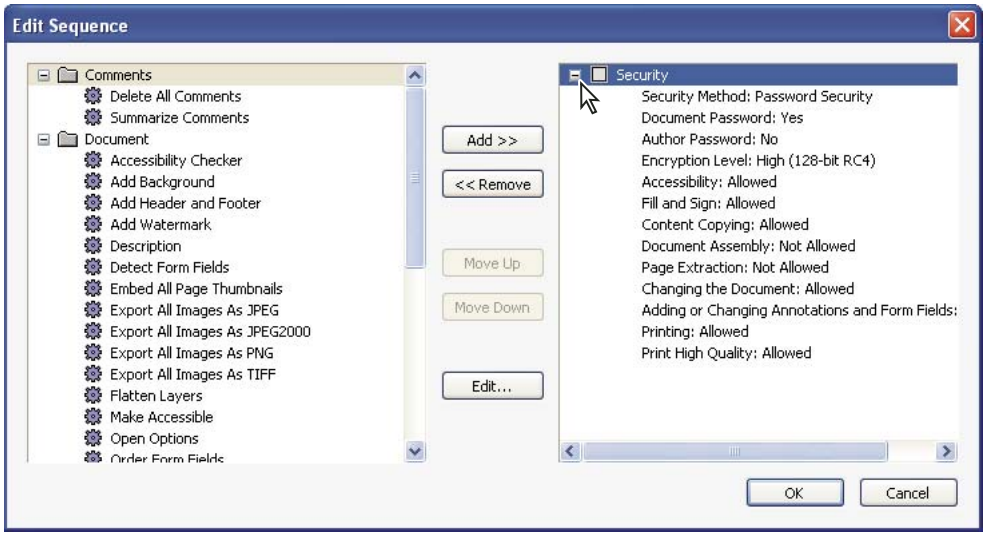
4 To change the options for a particular command, select the command from the list on the right, and click Edit. (The Edit button is unavailable if you select a command that has no options.) When you're done, click OK, and then click OK to return to the Edit Batch Sequence dialog box.

Note: *To review the command options, click the plus sign (+) to expand the command display.*

5 Specify which files you want to process from the Run Commands On menu by navigating to the folder or file, and then clicking Source File Options to make changes as needed.

6 From the Select Output Locations menu, choose a location option for the files that are created by the batch processing. If you choose Specific Folder, navigate to that folder.

7 Click Output Options, and specify the format to name and save the processed files, and then click OK.



Expanding the command display in the Edit Sequence dialog box

Make a batch sequence interactive

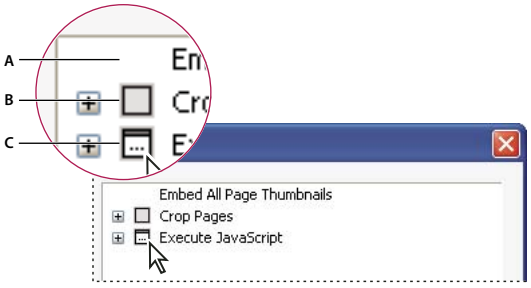
If your work requires that different documents use slightly different options for the same commands, you can still use batch processing to automate the work. By making a batch sequence interactive, you can set up your batch-processing definitions to have pauses between specific commands so that you can modify command options before they execute.

Note: *You can't add interactivity to commands that don't have interactive options.*

1 Choose Advanced > Document Processing > Batch Processing, select the batch sequence you want to add interactivity to, and click Edit Sequence.

2 In the Batch Edit Sequence dialog box, click Select Commands.

3 On the right side of the Edit Sequence dialog box, select the Toggle Interactive Mode option for the commands that you want to provide input to during processing, and then click OK.



Toggle Interactive Mode
A. *Interactive mode is not available.* ***B.*** *Interactive mode is available but not selected.* ***C.*** *Interactive mode is selected.*

Create a new batch sequence

1 Choose Advanced > Document Processing > Batch Processing.

2 Click New Sequence.

3 Type a descriptive name for your sequence in the Name Sequence dialog box and click OK.

4 In the Batch Edit Sequence dialog box, click Select Commands.

5 Select a command on the left side of the Edit Sequence dialog box and click Add.

6 Click Edit to change the settings for the selected command.

7 Repeat steps 5–6 to add and edit additional commands. Use the Move Up and Move Down buttons to rearrange the commands in the order you want, and then click OK.

8 In the Edit Batch Sequence dialog box, choose the settings you want from the menus.

9 Click Output Options, select the options you want to include, and then click OK.

Automate password entry for a batch sequence

Before you batch process PDFs that are encrypted or password protected, you can set your digital ID to enter the required password automatically.

1 Choose Advanced > Security Settings.

2 Select Digital IDs from the left.

3 Select an ID from the list on the right and then select the following:

Login Logs in using the specified digital ID. Type the password and click OK.

Logout Logs out the specified digital ID when you run a sequence.

See also

"About digital IDs" on page 253

Chapter 12: Searching and indexing

You have lots of control and lots of possibilities for running effective and efficient searches in Adobe Acrobat. A search can be broad or narrow, including many different kinds of data and covering multiple Adobe PDFs.

If you work with large numbers of related PDFs, you can define them as a catalog, which generates a PDF index for the PDFs. Searching the PDF index—instead of the PDFs themselves—dramatically speeds up searches.

Quickstart

The following topics provide simple steps to some common searching tasks.

Search for text

Use Find to search for text in an open PDF.

1. Type search terms in the Find text box on the toolbar.
2. (Optional) Click the arrow next to the Find text box and select any desired options, such as Include Bookmarks.
3. Press Enter.

To search all PDFs in a folder, choose Open Full Acrobat Search from the Find pop-up menu, click All PDF Documents In, and then select the folder you want to search.

See also

"Find text in a PDF" on page 370

Search for text in comments

You can search for text in comments, as well as the body of the PDF.

1. Type search terms in the Find text box on the toolbar.
2. Click the arrow next to the Find text box and select Include Comments.
3. Press Enter.

To see all search results at once, choose Open Full Acrobat Search from the Find pop-up menu and select In The Current PDF Document and Include Comments.

See also

"Find text in a PDF" on page 370

Search PDFs in a package

You can search all PDFs in an Adobe PDF package or only selected PDFs.

1. Open the package you want to search.
2. Type search terms in the Find text box, and choose Open Full Acrobat Search from the Find pop-up menu.

3 Choose In The Entire PDF Package. Or choose In Selected PDF Documents, and then select the desired PDFs from the list of PDFs included in the package.

See also

"Find text in multiple PDFs" on page 371

Search attachments

You can search for words in single PDF or in multiple PDFs, along with any attached PDFs up to two levels deep.

1 Choose Edit > Search, and click Use Advanced Search Options at the bottom of the window.

2 Type search terms in the text box, and choose how you want to restrict the search results.

3 Choose where you want to search.

4 Select Include Attachments, and then click Search.

See also

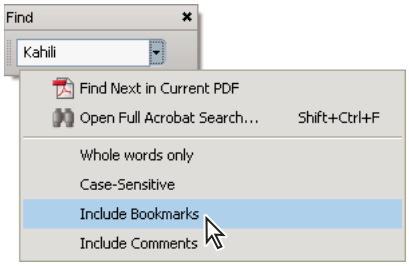
"Advanced Search Options" on page 372

Searching PDFs

Search features overview

You run searches to find specific items in PDFs. You can run a simple search, looking for a search term within in a single file, or you can run a more complex search, looking for various kinds of data in one or more PDFs.

You can run a search using either the Search window or the Find toolbar. In either case, Acrobat searches the PDF body text, layers, form fields, and digital signatures. You can also include bookmarks and comments in the search.



The Search window offers more options and more kinds of searches than the Find toolbar. When you use the Search window, object data and image XIF (extended image file format) metadata are also searched. For searches across multiple PDFs, Acrobat also looks at document properties and XMP metadata, and it searches indexed structure tags when searching a PDF index. If some of the PDFs you search have attached PDFs, you can include the attachments in the search.

Note: *PDFs can have multiple layers. If the search results include an occurrence on a hidden layer, selecting that occurrence displays an alert that asks if you want to make that layer visible.*

See also

"Show or hide layers" on page 360

"Examine a PDF for hidden content" on page 248

"Search and redact words" on page 250

Access the search features

Where you start your search depends on the type of search you want to run. Use the Find toolbar for a quick search of the current PDF. Use the Search window to look for words or document properties across multiple PDFs, use advanced search options, and search PDF indexes.

Display the Find toolbar

By default, the Find toolbar is already open. Use this procedure to open it if it has been closed.

❖ Do one of the following:

- Choose Edit > Find.
- Right-click/Control-click the toolbar area and choose Find on the context menu.
- Press Ctrl+F/Command+F.

Open the Search window

❖ Do one of the following:

- Choose Edit > Search.
- On the Find toolbar, click the arrow and choose Open Full Acrobat Search.

Search appears as a separate window that you can move, resize, minimize, or arrange partially or completely behind the PDF window.

Arrange the PDF document window and Search window

❖ In the Search window, click Arrange Windows.

Acrobat resizes and arranges the two windows side by side so that together they almost fill the entire screen.

Note: *Clicking the Arrange Windows button a second time resizes the document window but leaves the Search window unchanged. If you want to make the Search window larger or smaller, drag the corner or edge, as you would to resize any window on your operating system.*

Find text in a PDF

The Find toolbar searches the currently open PDF.

1 Type the text you want to search for in the text box on the Find toolbar.

2 (Optional) Click the arrow next to the text box and choose one or more of the following:

Whole Words Only Finds only occurrences of the complete word you type in the text box. For example, if you search for the word *stick*, the words *tick* and *sticky* aren't found.

Case-Sensitive Finds only occurrences of the words that match the capitalization you type. For example, if you search for the word *Web*, the words *web* and *WEB* aren't found.

Include Bookmarks Also searches the text in the Bookmarks panel.

Include Comments Also searches the text of any comments.

3 Press Enter.

Acrobat jumps to the first instance of the search term, which appears highlighted.

4 Press Enter repeatedly to go to the next instances of the search term.

Find text in multiple PDFs

The Search window enables you to look for search terms in multiple PDFs. For example, you can search across all open PDF documents, all PDFs in a specific location, or an open PDF package.

Note: *If documents are encrypted (have security applied to them), you cannot search them as part of a multiple-document search. You must open those documents first and search them one at a time. However, documents encrypted as Adobe Digital Editions are an exception and can be searched as part of a multiple-document search.*

See also

"About PDF packages" on page 119

Find text in PDFs in a specific folder

1 Open Acrobat on your desktop (not in a web browser).

2 Do one of the following.

- In the Find toolbar, type the text you want to search for, and then choose Open Full Acrobat Search from the pop-up menu.
- In the Search window, type the text you want to search for in the text box.

3 In the Search window, select All PDF Documents In. From the pop-up menu directly below this option, choose Browse For Location.

4 Select the location you want to search, either on your computer or on a network, and click OK.

5 If you want to specify additional search criteria, click Use Advanced Search Options, and select the options you want.

6 Click Search.

During a search, you can click a result or use keyboard shortcuts to navigate the results without interrupting the search. Clicking the Stop button under the search-progress bar cancels further searching and limits the results to the occurrences already found. It doesn't close the Search window or delete the Results list. To see more results, you must run a new search.

Search a PDF package

1 Open the PDF in Acrobat on your desktop (not in a web browser).

2 Do one of the following.

- In the Find toolbar, type the text you want to search for in the text box and then choose Open Full Acrobat Search from the pop-up menu.
- In the Search window, type the text you want to search for in the text box.

3 In the Search window, choose a location to look in:

- To search all PDFs in the package, choose In The Entire PDF Package.

- To search only some PDFs in the package, choose In Selected PDF Documents. Then select the PDFs you want to search in the PDF package navigation area.

4 If you want to specify additional search criteria, click Use Advanced Search Options, and select the options you want.

5 Click Search.

Review search results

After you run a search from the Search window, the results appear in page order, nested under the names of each searched document. Each item listed includes a few words of context (if applicable) and an icon that indicates the type of occurrence.

Jump to a specific instance in the search results

1 If necessary, click the plus sign (+) (Windows) or the triangle (Mac OS) to expand the search results. Then select an instance in the results to view that instance in the PDF.

2 To view other instances, do any of the following:

- Click another instance in the results.
- Choose Edit > Search Results, and then choose Next Result or Previous Result.

Sort instances in the search results

❖ Select an option from the Sort By menu near the bottom of the Search window. Results can be sorted by Relevance Ranking, Date Modified, Filename, or Location.

Icons shown with search results

The icon next to an instance of the search results indicates the search area in which the instance appears. Selecting an icon has the following effect:

Document icon Makes the PDF active in the document window. Click the plus (+) (Windows) or the triangle (Mac OS) next to the icon to show the list of individual search results within that PDF.

(General) Search Result icon Jumps to that instance of the search term, usually in the body text of the PDF. The instance of the search term is highlighted in the document.

Bookmark icon Opens the Bookmarks panel and highlights the instances of the search terms.

Comments icon Opens the Comments panel and highlights the instances of the search terms.

Layer icon May open a message indicating that the layer is hidden and asking if you want to make it visible.

Attachment icon Opens a PDF file that is attached to the searched parent PDF and shows the highlighted instances of the search terms.

Advanced Search Options

By default, the Search window displays basic search options. Click Use Advanced Search Options near the bottom of the window to display additional options. To restore the basic options, click Use Basic Search Options near the bottom of the window.

You can set a preference so that advanced search options always appear in the Search window. Access preferences by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS). Then select Search under Categories.

Return Results Containing Restricts your search results according to the option you choose:

• **Match Exact Word Or Phrase** Searches for the entire string of characters, including spaces, in the same order in which they appear in the text box.

• **Match Any Of The Words** Searches for any instances of at least one of the words typed. For example, if you search for *each of*, the results include any instances in which one or both of the two words appear: *each, of, each of,* or *of each.*

• **Match All Of The Words** Searches for instances that contain all your search words, but not necessarily in the order you type them. Available only for a search of multiple PDFs or index definition files.

• **Boolean Query** Uses the Boolean operators that you type with the search words into the What Word Or Phrase Would You Like To Search For box. Available only for searching multiple PDFs or PDF indexes.

Note: *You cannot run wildcard searches using asterisks (*) or question marks (?) when searching PDF indexes.*

Use These Additional Criteria (text options) Includes the basic search options plus four additional options:

• **Look In** Restricts the search to the current PDF, parts or all of a currently open PDF package (if applicable), an index, or a location on your computer. If you choose to search an index, a location, or a PDF package, additional options appear under Use These Additional Criteria.

• **Proximity** Searches for two or more words that are separated by no more than a specified number of words, as set in the Search preferences. Available only for a search of multiple documents or index definition files, and when Match All Of The Words is selected.

• **Stemming** Finds words that contain part (the stem) of the specified search word. For example, a search for *opening* finds instances of *open, opened, opens,* and *openly*. This option applies to single words and phrases when you search the current PDF, a folder, or an index created with Acrobat 6.0 or later. Wildcard characters (*, ?) aren't permitted in stemming searches. Stemming isn't available if either Whole Words Only or Case-Sensitive is selected.

• **Include Bookmarks** Searches the text of any bookmarks, as viewed in the Bookmarks panel.

• **Include Comments** Searches the text of any comments added to the PDF, as viewed in the Comments panel.

• **Include Attachments** Searches PDFs that are attached to the current PDF or other attached PDFs (up to two levels deep).

Use These Additional Criteria (document properties) Appears only for searches across multiple PDFs or PDF indexes. You can select multiple property-modifier-value combinations and apply them to searches.

Note: *You can search by document properties alone by using document property options in combination with a search for specific text.*

• **Check box** Applies the criteria set in the three connected options to the search. (The check box is selected automatically when you enter information in any of the three options for that set. After you enter options, deselecting the check box doesn't clear the entries; they just aren't applied to the search.)

• **First menu (property)** Indicates the document characteristic to search for. The available options include Date Created, Date Modified, Author, Title, Subject, Filename, Keywords, Bookmarks, Comments, JPEG Images, XMP Metadata, and Object Data.

• **Second menu (modifier)** Indicates the level of matching. If the first menu selection is a date, the available options in the second menu are Is Exactly, Is Before, Is After, Is Not. Otherwise, the available options are Contains and Does Not Contain.

• **Third box (value or text)** Indicates the information to be matched, which you type in. If the first menu selection is a date, you can click the arrow to open a calendar that you can navigate to find and select the date you want.

Boolean operators

Commonly used Boolean operators include the following:

AND Use between two words to find documents that contain both terms, in any order. For example, type **paris AND france** to identify documents that contain both *paris* and *france*. Searches with AND and no other Boolean operators produce the same results as selecting the All Of The Words option.

NOT Use before a search term to exclude any documents that contain that term. For example, type **NOT kentucky** to find all documents that don't contain the word *kentucky*. Or, type **paris NOT kentucky** to find all documents that contain the word *paris* but not the word *kentucky*.

OR Use to search for all instances of either term. For example, type **email OR e-mail** to find all documents with occurrences of either spelling. Searches with OR and no other Boolean operators produce the same results as selecting the Any Of The Words option.

^ (exclusive OR) Use to search for all instances that have either term but not both. For example, type **cat ^ dog** to find all documents with occurrences of either *cat* or *dog* but not both *cat* and *dog*.

( ) Use parentheses to specify the order of evaluation of terms. For example, type **white AND (whale OR ahab)** to find all documents that contain either *white* and *whale* or *white* and *ahab*. (The query processor performs an OR query on *whale* and *ahab* and then performs an AND query on those results with *white*.

To learn more about Boolean queries, syntax, and other Boolean operators that you can use in your searches, refer to any standard text, website, or other resource with complete Boolean information.

Search index files of cataloged PDFs

A full-text index is created when someone uses Acrobat to define a *catalog* of PDFs. You can search that index for the words you want to find rather than running a full-text search of each individual PDF in the catalog. An index search produces a results list with links to the occurrences of the indexed documents.

Note: *To search a PDF index, you must open Acrobat as a standalone application, not within your web browser. In Mac OS, indexes created with some older versions of Acrobat are not compatible with the Acrobat 8 Search feature and must be updated before you can use Acrobat 8 to search them.*

1 Open the Search window, type the words you want to find, and then click Use Advanced Search Options (near the bottom of the window).

2 For Look In, choose Select Index.

3 In the Index Selection dialog box, select an index, if the one you want to search is available, or click Add and then locate and select the index to be searched, and click Open. Repeat as needed until all the indexes you want to search are selected.

Note: *You can read file data about a selected index by clicking Info, and you can exclude indexes from the search either by selecting them and choosing Remove or by clearing the check box for that index.*

4 Click OK to close the Index Selection dialog box, and then choose Currently Selected Indexes on the Look In pop-up menu.

5 Proceed with your search as usual, selecting other options you want to apply, and clicking Search.

Note: *Selecting the Match Whole Word Only option when searching indexes significantly reduces the time taken to return results.*

See also

"Creating PDF indexes" on page 375

Search features preferences

Access preferences for search features by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then clicking Search under Categories.

Ignore Asian Character Width Finds both half-width and full-width instances of the Asian language characters in the search text.

Ignore Diacritics And Accents Finds the search terms with any variation of the alphabetical characters. For example, typing *cafe* finds both *cafe* and *café*. Likewise, typing *café* finds both versions. If this option isn't selected, typing *cafe* doesn't find *café*, and vice versa.

Always Use Advanced Search Options Makes the advanced options available in the Search window, in addition to the basic options.

Maximum Number Of Documents Returned In Results Limits the search results in the Search PDF window to a specific number of documents. The default value is 500, but you can enter any number from 1 to 10,000.

Range Of Words For Proximity Searches Limits the search results to those in which the number of words between the search terms isn't greater than the number you specify. Accepts a range from 1 to 10,000.

Enable Fast Find Generates a cache of information from any PDF that you search. This cache reduces subsequent search times for that PDF.

Maximum Cache Size Limits the temporary cache of search information for the Fast Find option to the specified size in megabytes (between 5 and 10,000). The default setting is 100.

Purge Cache Contents Deletes the Fast Find option's entire temporary cache of search information.

If you accidentally close the Search window while reviewing the results of a search, click the Search button to display the results, or choose Edit > Search Results > Next Result or Previous Result. The most recent search results remain until you run another search or close Acrobat.

Creating PDF indexes

Create and manage an index in a PDF

You can reduce the time required to search a long PDF by embedding an index of the words in the document. Acrobat can search the index much faster than it can search the document. The embedded index is included in distributed or shared copies of the PDF. Users search PDFs with embedded indexes exactly as they search those without embedded indexes; no extra steps are required.

Add an index to a PDF

1. With the document open in Acrobat, choose Advanced > Document Processing > Manage Embedded Index.
2. In the Manage Embedded Index dialog box, click Embed Index.
3. Read the messages that appear, and click OK.

Note: *In Outlook and Lotus Notes, you have the option of embedding an index when you convert email messages or folders to PDF. This is especially recommended for folders containing many email messages.*

Update or remove the embedded index in a PDF

1 Choose Advanced > Document Processing > Manage Embedded Index.

2 Click either Update Index or Remove Index.

3 Click OK in the confirmation message.

About the Catalog feature

You can define a specific group of PDFs as a *catalog* and create a unified index for that entire collection of documents. When users search the cataloged PDFs for specific information, the index makes the search process much faster.

When you distribute or publish the collection on a CD or website, you can include the index with the PDFs.

You can catalog documents written in Roman, Chinese, Japanese, or Korean characters. The items you can catalog include the document text, comments, bookmarks, form fields, tags, object and document metadata, attachments, document information, digital signatures, image XIF (extended image file format) metadata, and custom document properties.

Preparing PDFs for indexing

Begin by creating a folder to contain the PDFs you want to index. All PDFs should be complete in both content and electronic features, such as links, bookmarks, and form fields. If the files to be indexed include scanned documents, make sure that the text is searchable. Break long documents into smaller, chapter-sized files, to improve search performance. You can also add information to a file's document properties to improve the file's searchability.

Before you index a document collection, it's essential that you set up the document structure on the disk drive or network server volume and verify cross-platform filenames. Filenames may become truncated and hard to retrieve in a cross-platform search. To prevent this problem, consider these guidelines:

- Rename files, folders, and indexes using the MS-DOS file-naming convention (eight characters or fewer followed by a three-character file extension), particularly if you plan to deliver the document collection and index on an ISO 9660-formatted CD-ROM disc.
- Remove extended characters, such as accented characters and non-English characters, from file and folder names. (The font used by the Catalog feature does not support character codes 133 through 159.)
- Don't use deeply nested folders or path names that exceed 256 characters for indexes that will be searched by Mac OS users.
- If you use Mac OS with an OS/2 LAN server, configure IBM® LAN Server Macintosh (LSM) to enforce MS-DOS file-naming conventions, or index only FAT (File Allocation Table) volumes. (HPFS [High Performance File System] volumes may contain long unretrievable filenames.)

If the document structure includes subfolders that you don't want indexed, you can exclude them during the indexing process.

Adding metadata to document properties

To make a PDF easier to search, you can add file information, called *metadata*, to the document properties. (You can see the properties for the currently open PDF by choosing File > Properties, and clicking the Description tab.)

(Windows) You can also enter and read the data properties information from the desktop. Right-click the document in Windows Explorer, choose Properties, and click the PDF tab. Any information you type or edit in this dialog box also appears in the Document Properties Description when you open the file.

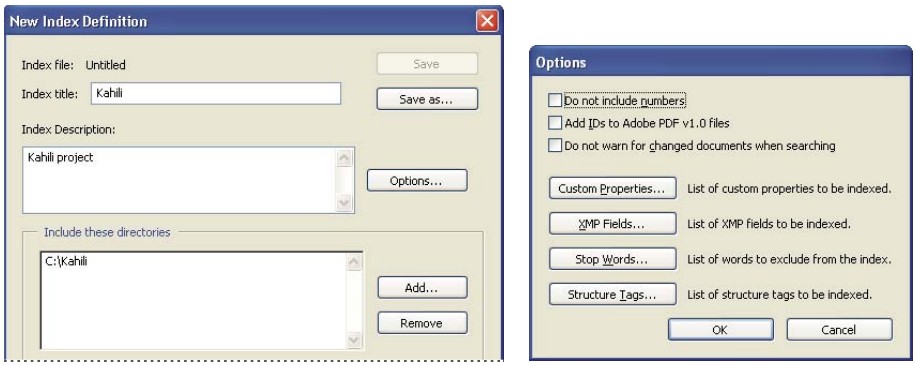
When adding data for document properties, consider the following recommendations:

- Use a good descriptive title in the Title field. The filename of the document should appear in the Search Results dialog box.
- Always use the same option (field) for similar information. For example, don't add an important term to the Subject option for some documents and to the Keywords option for others.
- Use a single, consistent term for the same information. For example, don't use *biology* for some documents and *life sciences* for others.
- Use the Author option to identify the group responsible for the document. For example, the author of a hiring policy document might be the Human Resources department.
- If you use document part numbers, add them as keywords. For example, adding *doc#=m234* in Keywords could indicate a specific document in a series of several hundred documents on a particular subject.
- Use the Subject or Keywords option, either alone or together, to categorize documents by type. For example, you might use *status report* as a Subject entry and *monthly* or *weekly* as a Keywords entry for a single document.

If you already have specialized training in Adobe PDF, you can define custom data fields, such as Document Type, Document Number, and Document Identifier, when you create the index. This is recommended only for advanced users and is not covered in Acrobat Complete Help.

Create an index for a collection

When you build a new index, Acrobat creates a file with the .pdx extension and a new support folder, which contains one or more files with .idx extensions. The IDX files contain the index entries. All of these files must be available to users who want to search the index.



Dialog boxes for the index-creation process

1 Choose Advanced > Document Processing > Full Text Index with Catalog, and then click New Index.

2 In Index Title, type a name for the index file.

3 In Index Description, type a few words about the type of index or its purpose.

4 Click Options, select any advanced options you want to apply to your index, and click OK.

5 Under Include These Directories, click Add, select a folder containing some or all of the PDF files to be indexed, and click OK. To add more folders, repeat this step.

Note: *Any folder nested under an included folder will also be included in the indexing process. You can add folders from multiple servers or disk drives, as long as you do not plan to move the index or any items in the document collection.*

6 Under Exclude These Subdirectories, click Add, and select any nested folder that contains PDF files you do not want to be indexed. Click OK and repeat, as needed.

7 Review your selections. To make changes to the list of folders to be included or excluded, select the folder you want to change and click Remove.

8 Click Build, and then specify the location for the index file. Click Save, and then:

- Click Close when the indexing finishes.
- Click Stop to cancel the indexing process.

Note: *If you stop the indexing, you cannot resume the same indexing session but you don't have to redo the work. The options and folder selections remain intact. You can click Open Index select the partially finished index, and revise it.*



If long path names are truncated in the Include These Directories And Exclude These Subdirectories options, hold the pointer over each ellipsis (...) until a tool tip appears, displaying the complete path of the included or excluded folder.

See also

"Catalog preferences" on page 379

Indexing Options dialog box

Do Not Include Numbers Select this option to exclude all numbers that appear in the document text from the index. Excluding numbers can significantly reduce the size of an index, making searches faster.

Add IDs To Adobe PDF v1.0 Files Select this option if your collection includes PDFs created before Acrobat 2.0, which did not automatically add identification numbers. ID numbers are needed when long Mac OS filenames are shortened as they are translated into MS-DOS filenames. Acrobat 2.0 and later versions automatically add identifiers.

Do Not Warn For Changed Documents When Searching When this option is not selected, a message appears when you search documents that have changed since the most recent index build.

Custom Properties Use this option to include custom document properties in the index; only custom document properties that already exist in the PDFs you index are indexed. Type the property, make a selection from the Type menu, and then click Add. These properties appear as a search option in the Search PDF window's additional criteria pop-up menus when you search the resulting index. For example, if you enter the custom property Document Name and choose the string property from the Type menu, a user searching the index can then search within the custom property by selecting Document Name from the Use These Additional Criteria menu.

Note: *When you create custom fields in a Microsoft Office application in which the Convert Document Information option is selected in the PDFMaker application, the fields transfer over to any PDFs you create.*

XMP Fields Use this option to include custom XMP fields. The custom XMP fields are indexed and appear in the additional criteria pop-up menus to be searchable in the selected indexes.

Stop Words Use to exclude specific words (500 maximum) from the index search results. Type the word, click Add, and repeat as needed. Excluding words can make the index 10% to 15% smaller. A stop word can contain up to 128 characters and is case sensitive. Certain common words, such as *the*, *and*, and *to* are already excluded from index searching, so it is not necessary to add them yourself.

Note: *To prevent users from trying to search phrases that contain these words, list words that aren't indexed in the Catalog Read Me file.*

Structure Tags Use this option to make specific leaf-element tag nodes searchable in documents that have a tagged logical structure.

Note: *The Custom Properties, Stop Words, and Tags settings apply to the current index only. To apply these settings globally to any index you create, you can change the default settings for custom fields, stop words, and tags in the Catalog panel of the Preferences dialog box.*

Catalog Readme files

It is often a good idea to create a separate Readme file and put it in the folder with the index. This Readme file can give people details about your index, such as:

- The kind of documents indexed.
- The search options supported.
- The person to contact or a phone number to call with questions.
- A list of numbers or words that are excluded from the index.
- A list of the folders containing documents included in a LAN-based index, or a list of the documents included in a disk-based index. You might also include a brief description of the contents of each folder or document.
- A list of the values for each document if you assign Document Info field values.

If a catalog has an especially large number of documents, consider including a table that shows the values assigned to each document. The table can be part of your Readme file or a separate document. While you are developing the index, you can use the table to maintain consistency.

Revise an index

You can update, rebuild, or purge an existing index.

1 Select Advanced > Document Processing > Full Text Index With Catalog, and then click Open Index.

2 Locate and select the index definition file (PDX) for the index, and click Open.

3 If the index was created with Acrobat 5.0 or earlier, select Create Copy to create a new index (without overwriting the earlier version), or select Overwrite Old Index to overwrite the earlier index.

4 In the Index Definition dialog box, make any changes you want, and then click the function you want Acrobat to perform:

Build Creates a new IDX file with the existing information, and updates it by adding new entries and marking changed or outdated entries as invalid. If you make a large number of changes, or use this option repeatedly instead of creating a new index, search times may increase.

Rebuild Creates a new index, overwriting the existing index folder and its contents (the IDX files).

Purge Deletes the index contents (the IDX files) without deleting the index file itself (PDX).

Catalog preferences

You can set preferences for indexing that apply globally to all subsequent indexes you build. You can override some of these preferences for an individual index by selecting new options during the index-building process.

You open catalog preferences by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS) and selecting Catalog under Categories. Many of the options are identical to those described for the index-building process.

The Force ISO 9660 Compatibility On Folders option is useful when you don't want to change long PDF filenames to MS-DOS filenames as you prepare documents for indexing. However, you must still use MS-DOS file-naming conventions for the folder names (8 characters or fewer) even though this isn't necessary for the filenames.

Scheduled index updates

You can schedule when and how often to automatically build, rebuild, update, and purge an index by using the Catalog feature and a catalog batch PDX file (.bpdx). A *BPDX file* is a text file that contains a list of platform-dependent catalog index file paths and flags. You use a scheduling application, such as Windows Scheduler or Scheduler for Mac OS, to display the BPDX file in Acrobat. Acrobat then re-creates the index according to the flags in the BPDX file.

For more detailed information on scheduling an indexing update, search for BPDX on the Support page of the Adobe website.

Moving collections and their indexes

You can develop and test an indexed document collection on a local hard drive and then move the finished document collection to a network server or disk. An index definition contains relative paths between the index definition file (PDX) and the folders containing the indexed documents. If these relative paths are unchanged, you don't have to rebuild the index after moving the indexed document collection. If the PDX file and the folders containing the indexed documents are in the same folder, you can maintain the relative path simply by moving that folder.

If the relative path changes, you must create a new index after you move the indexed document collection. However, you can still use the original PDX file. To use the original PDX file, first move the indexed documents. Then copy the PDX file to the folder where you want to create the new index, and edit the include and exclude lists of directories and subdirectories, as necessary.

If the index resides on a drive or server volume separate from any part of the collection it applies to, moving either the collection or the index breaks the index. If you intend to move a document collection either to another network location or onto a CD, create and build the index in the same location as the collection.

Chapter 13: Movies, sounds, and 3D models

The possibilities for Adobe PDFs extend to the richness of multimedia communication. PDFs can include video clips, digital audio, and 3D models that readers can move, turn, zoom in on, and examine part by part.

Movies and sounds

Play movies and sounds

PDFs can include many types of movie and sound files, including (but not limited to) Flash, QuickTime, mp3, MPEG, and Windows Media files. These files may be accessed on a page or within a link, bookmark, form field, or page action. Each movie and sound file includes a play area from which the media can be activated. The play area typically appears on the PDF page as an image or a rectangle, but can also be invisible.

Note: *You must have the necessary hardware and software installed to play the media files.*

To help protect your computer from viruses, Acrobat solicits your approval before playing multimedia files from unverified sources. You can change this default behavior in the Multimedia Trust preferences.

❖ Using the Hand tool or the Select tool, click the play area of the movie or sound file. When the pointer is positioned over the play area, it changes to the play mode icon .

Multimedia preferences

You can specify the media player you want to play movies and sounds by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then selecting Multimedia from the left side of the dialog box.

Preferred Media Player Choose the default player that plays media clips from the list of currently installed media players.

Accessibility Options Specify if you want special features (if available) to appear when media plays, such as subtitles and dubbed audio. Specify the preferred language for the media, in case multiple languages are available.

Multimedia Trust preferences

In the Multimedia Trust preferences, you can specify whether to play embedded multimedia files in trusted or nontrusted PDF documents. A *trusted* document is a document that you approved or that was produced by an author you approved. By setting your permissions to play multimedia only in trusted documents, you can prevent programs, macros, and viruses from playing on, and potentially damaging, your computer.

The list of trusted documents and authors is stored internally and can't be viewed. If you add a certified document to the list, both the document and the author's certificate are added to the list of trusted documents. All documents that are certified by this author are trusted. (Trusted documents also include PDFs that were created by authors in your list of trusted identities.)

To access these preferences, choose Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), and then select Multimedia Trust from the left side of the dialog box.

Display Permissions For Choose whether you want to display security permissions for trusted documents or other (nontrusted) documents.

Allow Multimedia Operations Select this option to allow media clips to be played. When selected, you can change the permission settings for a particular player and enable options that determine the appearance of the media during playback.

Change Permission Settings For A Player Select the player in the list, and then choose one of the following options from the menu:

- **Always** Allows the player to be used without prompting.
- **Never** Prevents the player from being used.
- **Prompt** Asks the user whether the player can be used. If you select this option and allow the player to play the media in a particular document, that document becomes trusted.

Clear Your List Of Trusted Documents Deletes the current list of trusted documents and authors. Use this option to prevent media from playing in documents that were previously trusted documents or created by trusted authors. This option is available only when a PDF that contains multimedia is open.

Add movies or sounds to PDFs

You can add movies and sounds to PDFs in Windows if the media is playable in Windows Media Player, Flash Player, RealPlayer, or QuickTime. In Mac OS, you can add QuickTime compatible movies and sounds to PDFs.

Before you add a movie or sound clip to a PDF, you must decide if your clip will be compatible—that is, playable—in Acrobat 6 and later, or in earlier versions as well. If you choose the Acrobat 6 Compatible Media option, you have many more choices, such as the option to embed the movie and add multiple renditions. However, users with earlier versions of Acrobat will have to download Adobe Reader to play your clip.

You can provide different renditions of the movie that play if the users' settings vary. For example, you may want to include a low-resolution rendition for users with slow Internet connections.

Note: *If an alert message tells you that no media handler is available, you must install the appropriate player before you can add clips to the PDF. For example, you must install QuickTime if you want to embed an MOV file in a PDF.*

See also

"View PDFs in Full Screen mode" on page 30

"About Actions" on page 336

Add a movie or sound clip

1 Choose Tools > Advanced Editing, and select either the Movie tool or the Sound tool .

2 Drag or double-click to select the area on the page where you want the movie or sound to appear. For movies, the play area is the exact size of the movie frame (if Acrobat can read the movie clip's dimensions).

3 In the dialog box that appears, select a compatibility setting for your clip:

Acrobat 6 (And Later) Compatible Media Provides access to all options, but the user must have version 6.0 or later of Acrobat or Adobe Reader to play the clip.

Acrobat 5 (And Earlier) Compatible Media Ensures that your clip is available to users who have not yet upgraded from version 5.0 or earlier of Acrobat or Adobe Reader. This option requires that you select media that is playable in the QuickTime player.

4 To specify the clip, type the path or URL in the Location box, or click Browse (Windows) or Choose (Mac OS) and double-click the movie file.

5 If you selected Acrobat 6 (And Later) Compatible Media, you can include the clip with the PDF by selecting Embed Content In Document. This option will increase the file size of the PDF.

6 To display an image in the play area when the movie isn't playing, select a poster option, and then click OK. After you add the movie to the PDF, you can specify additional properties that determine how the clip appears and plays.

Edit the play area

1 Using the Movie tool, the Sound tool, or the Select Object tool, click the play area to select it.

When you move any of these tools over the play area, handles appear on the borders of the play area, even on those with invisible borders.

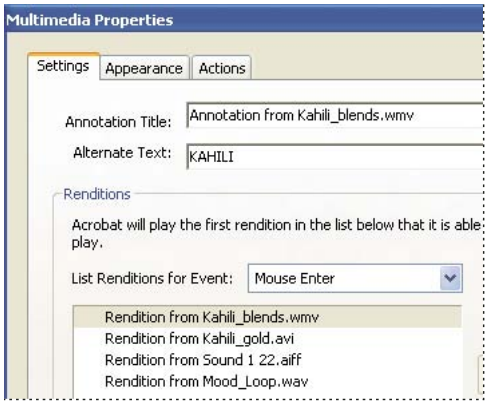
2 Do any of the following:

- Move the clip by dragging its icon to a new location on the page.
- Delete the clip by selecting it and pressing Delete.
- Resize the clip by dragging one of the corners of the frame until it is the desired size. Hold down Shift to retain the correct proportions for movie clips.

Create alternate renditions

By default, the movie clip you add to a PDF is the first and only rendition listed in the Multimedia Properties dialog box. You can create alternate renditions or add other renditions to ensure that users can play the movie clip on their systems. For example, you can have a large, high-quality movie file and a smaller, low-quality movie file. You can specify system settings that a rendition requires to play; the rendition that best matches the user's system is played.

Renditions are assigned to the Mouse Up action by default, which means that when the mouse button is clicked and released, the rendition is played. You can assign different renditions to different actions, although (in most cases) the Mouse Up action is best.



If the first rendition cannot be played, the next available rendition is played.

1 Using the Sound tool or the Movie tool, double-click the play area.

2 On the Settings tab, click Add Rendition, choose one of the following options, and then click OK:

Using A File Double-click the file you want to add to the rendition list (for example, it may be a low-resolution version of the movie clip that contains the same content as the first rendition). The content type is selected automatically.

Using A URL Type the URL, and then specify the content type.

By Copying An Existing Rendition Select the rendition that you want to copy.

3 Select the rendition, and then click Edit Rendition. Specify the minimum system requirements, playback requirements, and other settings to differentiate it from other renditions.

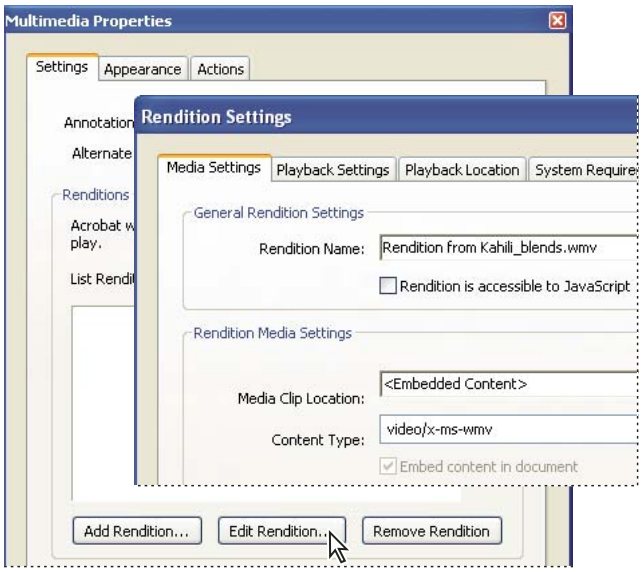
4 Add and edit as many renditions as needed.

5 Use the arrow keys on the right side of the list box to arrange the renditions in the appropriate order. Renditions are played in the order listed, provided the rendition meets the requirements you've specified.

6 When you're finished adding and editing renditions, click Close.

Rendition settings

The Rendition Settings dialog box appears when you click Edit Rendition on the Settings tab of the Multimedia Properties dialog box.



Note: *Media players have different capabilities. Some rendition settings, such as player controls, are not available for some players. In such cases, you can determine whether the player may be used to play the rendition by changing the requirement settings on the Playback Requirements tab.*

Media Settings Use this tab to specify general properties for the movie clip:

- **Rendition Name** Enter the name for the rendition, which will appear in the list of renditions. (This name does not determine which media file is played.)

- **Rendition Is Accessible To JavaScript** Use this option if you're using JavaScript code that makes use of the rendition.

• **Media Clip Location** Specify the clip by typing or navigating to it. (When you specify the clip location, Content Type is set automatically. Changing the Content Type setting may cause problems playing the media.)

• **Rendition Alternate Text** Type a description of the rendition that may be read aloud to visually impaired viewers.

• **Allow Temp File** Specify whether writing a temp file is allowed and when. Some media players write a temp file when they play a movie clip. If you want to prevent users from easily copying the media content in a secure document, you may want to disallow the creation of temp files. However, selecting this setting may prevent the movie from being played by media players that require the use of temp files.

Playback Settings Use this tab to determine how the movie clip is played.

• **Keep Player Open** Select whether you want the player to close after it plays the movie clip, be left open indefinitely, or be left open for the number of seconds you specify.

• **Volume** Lets you specify how loud the movie is played.

• **Show Player Controls** When selected, displays a controller bar at the bottom of the play area that lets users stop, pause, and play, provided the media player supports player controls.

• **Repeat** Lets you replay a clip two or more times, or continuously.

• **Player List** Click Add to specify a player and the settings that are required, preferred, or disallowed to play the movie clip. Select the name of the player, the minimum version number of the player, and the status. If you set the status of more than one player to Required, only one of the required players may be used to play the rendition. If you set the status of players to Preferred, these players are selected over nonpreferred players (but not over required players). If you set the status of players to Disallowed, they are not used to play the rendition.

Playback Location Use this tab to determine whether a movie clip is played in the PDF, remains hidden while played (recommended for sound clips), is played in a floating window, or is played full screen. When Floating Window is selected, you can add a title, set the window position, and let the user resize or close the window. Note that the user's preference settings may require (or ignore) title bar text for playback.

The window position is determined relative to the document window, application window, or, for dual-monitor configurations, the virtual desktop or primary desktop. You may also specify the width and height of the floating window. Click Get From Media to obtain the movie clip's dimensions, if available, and then edit as necessary.

System Requirements Use this tab to choose the minimum settings for systems on which the movie clip is played. For example, you can require that a user have at least a 1024-by-768 screen resolution to play the movie clip. For options such as Play Dubbed Audio, you can select Either, Disabled, or Enabled. If you select Either, you defer to the settings in the user's Multimedia panel of the Preferences dialog box. If you select Disabled or Enabled, the corresponding setting in Multimedia preferences must allow the rendition to be used. For example, if the Play Dubbed Audio option is enabled, the rendition may be used only if the Play Dubbed Audio preference option is selected.

Playback Requirements Use this tab to select which attributes are required for the rendition to be played. The attributes on this tab include settings from the other tabs, letting you indicate which ones are required. For example, if you set the volume to 50% in the Playback Requirements tab, and you don't want the rendition to be played unless this volume level can be used, select the Required box next to Volume.

Set multimedia properties

You can specify properties for Acrobat 6.0 compatible multimedia files and Acrobat 5.0 compatible multimedia files. For instance, you can specify the appearance of a movie's play area, and whether the movie plays once or continuously.

The compatibility version you choose determines the features that are available to you. For example, to include alternate renditions with a multimedia file, you must choose Acrobat 6.0 compatibility.

Set Acrobat 6.0-compatible properties

1 Select the Movie tool, the Sound tool, or the Select Object tool, and then double-click the play area.

2 Click the Settings tab in the Multimedia Properties dialog box.

3 Type the title of the movie in the Annotation Title box. This title does not determine which media file is played.

4 Type a description of the media file in the Alternate Text box. This description may be read aloud for visually impaired viewers.

5 To change media settings, such as showing player controls and setting the volume level, select the media clip rendition, and click Edit Rendition. (For a description of rendition settings, see "Create alternate renditions" on page 383.) Click OK to return to the Multimedia Properties dialog box.

6 To add alternate renditions, such as low-resolution files, click Add Rendition, and specify the file source for the rendition (from file, URL, or existing rendition).

7 Click the Appearance tab to select options to determine the border appearance of the play area and the poster image.

8 Click the Actions tab to define new actions for the various mouse movements, and then click Close.

Set Acrobat 5.0-compatible properties

1 Select the Movie tool, the Sound tool, or the Select Object tool, and then double-click the play area.

2 Type a name in the Title box. By default, the name of the media file appears as the title. If you create an action that refers to this media title, changing its name prevents the action from working properly.

3 To specify a different media file on a local drive, select Local File and then click Change Location; to specify a different media file located on the Internet, select URL and then type the web address in the Location box. Click Close.

4 On the Playback tab, select from the following options:

Show Player Controls Displays a controller bar at the bottom of the play area.

Use Floating Window Plays the media clip in a separate window. Specify the dimensions (using scale factors) of the floating window in the Size menu.

Play Determines the play action of the media clip.

5 On the Appearance tab, specify the appearance of the border and poster for the play area. The poster defines the appearance of the play area when the movie isn't playing. To reduce file size (and possibly the image quality) select 256 Colors. Click Close.

Adding 3D models to PDFs

Ways to put 3D models in PDFs

When PDF files include 3D models, viewers using Adobe Reader or Adobe Acrobat can interact with the 3D models using built-in features such as zoom, pan, and rotation tools. Creating PDF files with 3D models requires Acrobat 3D, which supports a variety of 3D file formats.

Note: *Acrobat Professional can create 3D PDFs but only from U3D version 1.0 files.*

See also

"Interacting with 3D models" on page 388

Add 3D models to a PDF page

You can use the 3D tool to place a 3D file (in U3D 3rd edition format) on a PDF page.

After you place a 3D file, you can adjust the area or *canvas* in which the 3D model appears, edit the presentation properties for the 3D toolbar and content, and create additional views.

For additional 3D features, such as the ability to convert 3D files to PDF or add JavaScripts to 3D objects, consider upgrading to Acrobat 3D.

See also

"3D toolbar overview" on page 388

Add a 3D model to a page

1. Choose Tools > Advanced Editing > 3D Tool.
2. Drag a rectangle on the page to define the canvas area for the 3D file.
3. Under 3D Model, click Browse to select the 3D file, and click Open.

Move, delete, or resize the 3D canvas

1. Choose Tools > Advanced Editing > Select Object Tool .

Note: *Be careful not to confuse the Select Object tool with the basic Select tool. You must use the Select Object tool to adjust a 3D canvas.*

2. Select the 3D canvas and make any changes you want to apply:

- To move the canvas, drag it to a new location on the page.
- To delete the canvas (and the 3D model), select it and press Delete.
- To resize the canvas, drag the frame corners. The 3D content stays proportional within the adjusted frame.

3D properties

Open the 3D Properties dialog box for a file by choosing Tools > Advanced Editing > Select Object Tool, right-clicking/Control-clicking the embedded 3D model, and choosing Properties.

Enable Default 3D Interaction Lets users rotate, move, and interact with the 3D model in standard ways.

Show 3D Toolbar By Default Displays the 3D toolbar when you activate the 3D model.

Open Model Tree By Default Displays the Model Tree when you activate the 3D model.

Enable 3D When Specifies when the 3D model (also called the annotation) is activated. When the 3D model is enabled, you can interact with it, with the 3D navigation tools, for example.

Default Animation State Sets the default animation behavior upon activation as Playing or Paused.

Disable 3D When Determines how the 3D model can be deactivated. If you choose Explicit Deactivation, the user must right-click the 3D model (with the Hand tool or one of the 3D navigation tools) and choose Disable 3D. When a 3D model is disabled, the 2D preview image or poster appears in the canvas.

When 3D Is Disabled Determines the default animation behavior upon deactivation of the 3D model. Choose Choose Keep The Content Playing, Pause The Content to leave the animation activated but not playing, or Reset The 3D Content to display the poster in the 3D canvas.

Edit Content Opens the Add 3D Content dialog box, which you can use to replace the embedded 3D file, JavaScript, or poster image.

Manage Views Opens the Manage Views dialog box, which you can use to add, remove, and reorganize views of the 3D model.

See also

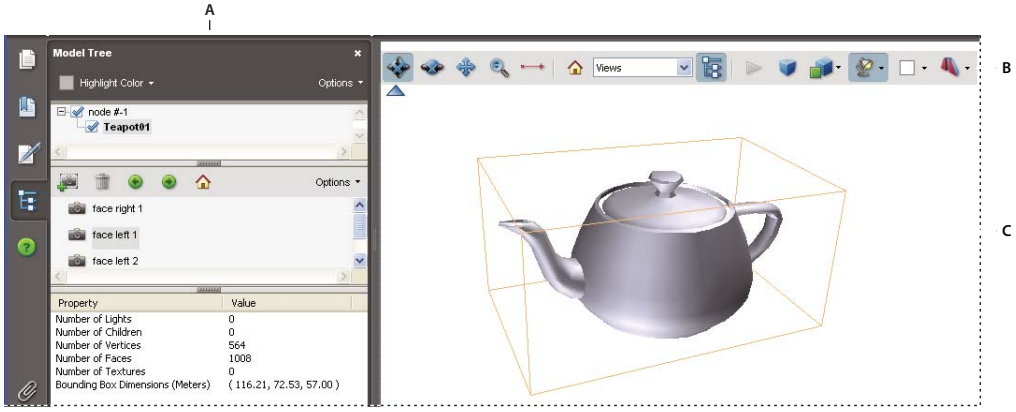
"Set 3D views" on page 397

Interacting with 3D models

Displaying 3D models

In Acrobat, you can view and interact with high-quality 3D content created in professional 3D CAD or 3D modeling programs and embedded in PDFs. For example, you can selectively hide and show parts of a 3D model, remove a cover to look inside, and turn parts around as if holding them in your hands.

3D content may initially appear as a two-dimensional preview image. Clicking the 3D model with the Hand or Select tool enables (or activates) the model, opens the 3D toolbar, and plays any animation.



Selected 3D object
***A.** Model Tree **B.** 3D toolbar **C.** 3D object*

3D toolbar overview

The 3D toolbar appears after you click the 3D model with the Hand tool, which also enables the 3D model and plays any animations associated with it. The 3D toolbar always appears in the area above the upper left corner of the 3D model and cannot be moved. A small blue triangle appears immediately below the 3D toolbar, which you can click to hide and show the toolbar.

Note: *You can disable or enable the blue triangle toggle by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), selecting 3D under Categories, and then clicking the Enable Toggle For 3D Toolbar Control option.*

You can use the 3D toolbar to zoom in and out, rotate, and pan across the object. Use the Model Tree to hide or isolate parts, or make parts transparent.

You manipulate a 3D model by selecting and dragging various 3D navigation tools. When you navigate in 3D, it may help to think of it as viewing the stationary 3D model from a camera's perspective. You can rotate, pan (move up, down, or side-to-side), and zoom in or out.

Note: *You can hide the toolbar by right-clicking/Control-clicking the 3D model and choosing Hide Toolbar. To show the toolbar, choose Show Toolbar from the same context menu.*

3D navigation tools

Rotate Turns 3D objects around relative to the screen. How the objects move depends on the starting view, where you start dragging, and the direction you drag, such as in a straight line or in curves, circles, or loops.

Note: *You can also use the Hand tool to rotate an object if Enable 3D Selection For The Hand Tool is selected in the 3D panel of the Preferences dialog box.*

Spin Turns a 3D model in parallel to two fixed axes in the 3D model, the x-axis and the z-axis.

Pan Moves the model vertically and horizontally only. You can also pan with the Hand tool: Ctrl-drag/Command-drag.

Zoom Moves you toward, or away from, objects in the scene when you drag vertically. You can also zoom with the Hand tool by holding down Shift as you drag.

Walk Pivots horizontally around the scene when you drag horizontally; moves forward or backward in the scene when you drag vertically; maintains a constant elevation level, regardless of how you drag.The Walk tool is especially useful for architectural 3D models. To change the walking speed, change the default display units in the Preferences (3D).

Note: *The Walk tool is available when you select the Preferences setting that consolidates tools or when you right-click /Control-click the 3D model and choose Tools > Walk.*

3D Measurement Tool Measures part sizes and distances in the 3D model.

(Windows) Use the right mouse button to change the way several of the 3D navigation tools work. For the Rotate and Spin tools, right-click dragging temporarily shifts to the Zoom tool. For the Zoom tool, it makes the tool function like a Marquee Zoom tool, zooming to the area that you define when you drag. For the Walk tool, right-click dragging makes the tool function as the Pan tool. (Mac OS) If you have a one-button mouse, you can Control-drag or Option-drag to make the Rotate and Spin tools temporarily act as the Pan tool.

3D toolbar view controls

Default View Returns to a preset zoom, pan, rotation, and projection mode of the 3D model. You can use the Options menu in the View pane of the Model Tree or the Manage Views command on the 3D toolbar Views menu to set a different view as the default.

If an object ever moves out of your view, you have, in essence, turned your camera completely away from the object. Click the Default View icon on the 3D toolbar to move the object back into view.

Views menu Lists any views defined for the current 3D model.

Toggle Model Tree Opens and hides the Model Tree.

Play/Pause Animation Plays or pauses any JavaScript-enabled animation. The Play/Pause Animation pop-up menu opens a slider that you can drag back and forth to move to different times in the animation sequence.

Projection Toggles between using perspective and orthographic projection of the 3D object.

Model Render Mode menu Determines how the 3D shape appears. For an illustrated guide, see "Examples of model rendering modes" on page 390.

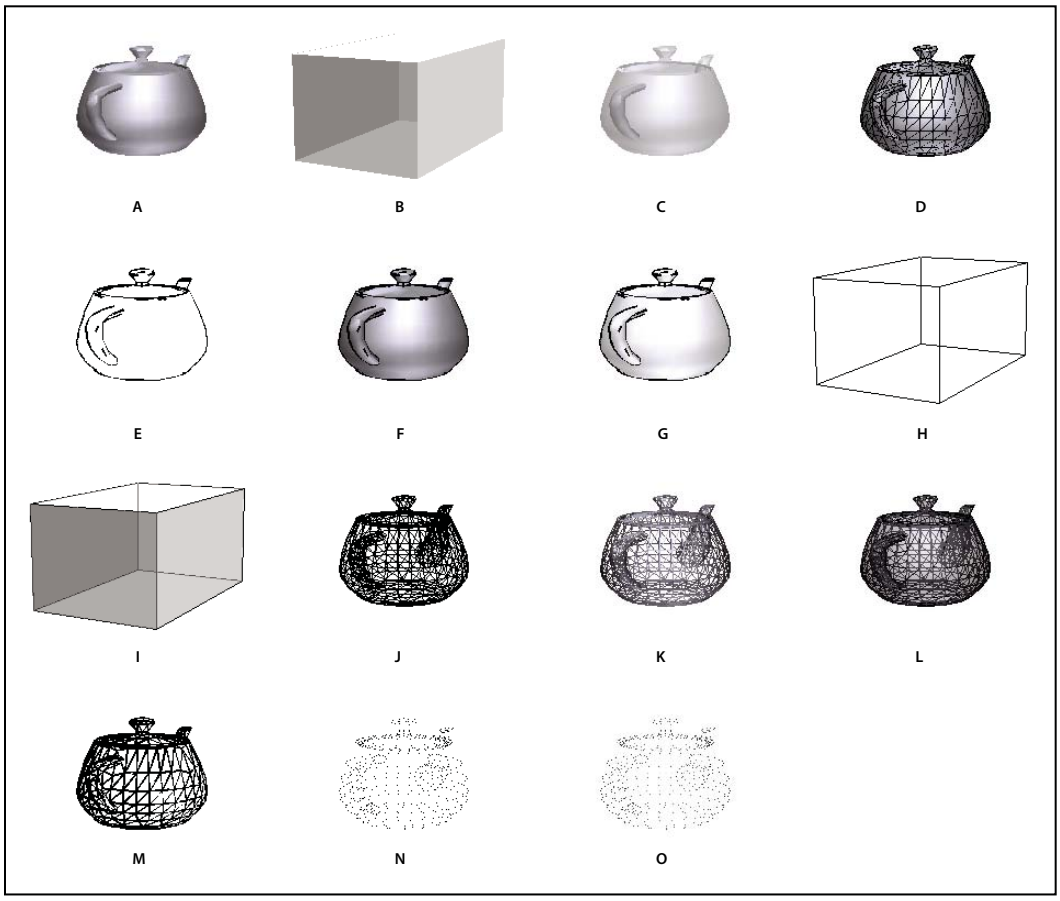
Enable Extra Lighting menu Lists the different lighting effects, in which the number, color, orientation, and brightness of the lights, the reflectivity of the surface, and other factors affect the illumination of the 3D object. Experiment to get the visual effects you want.

Background Color swatch Opens the color picker, which you can use to select a different color for the space surrounding the 3D object.

Toggle Cross Section Shows and hides cross sections of the object. Click the pop-up button to open the Cross Section Properties dialog box. For more information, see "Create cross sections" on page 393.

Examples of model rendering modes

The model rendering modes include combinations of factors that affect the appearance of the 3D object. The illustration below shows a simple object rendered in each of the available modes.



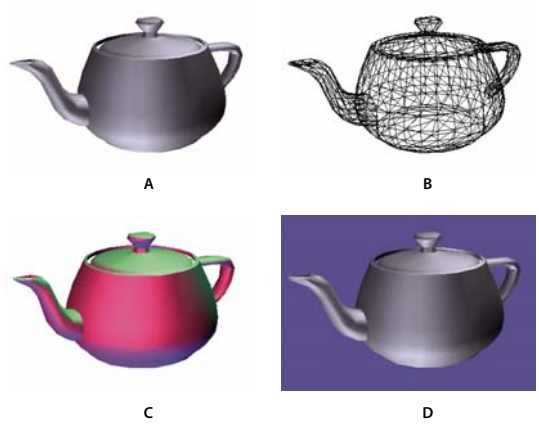
Model rendering modes
***A.** Solid **B.** Transparent Bounding Box **C.** Transparent **D.** Solid Wireframe **E.** Illustration **F.** Solid Outline **G.** Shaded Illustration **H.** Bounding Box **I.** Transparent Bounding Box Outline **J.** Wireframe **K.** Shaded Wireframe **L.** Transparent Wireframe **M.** Hidden Wireframe **N.** Vertices **O.** Shaded Vertices*

Editing 3D models

Use a 3D authoring application to make changes to your 3D source images.

Change rendering mode, lighting, projection, and background

The model rendering mode determines the surface appearance of the 3D model. The default rendering mode is usually solid, but you can also choose another rendering mode. You can also change the lighting of the 3D model as well as the background.



Changing the appearance of the 3D model
***A.** Default appearance **B.** Wireframe rendering mode **C.** Colored lighting **D.** Different background color*

❖ Use items on the 3D toolbar to make any of these changes:

- To change the rendering mode, choose an option from the Model Render Mode pop-up menu .
- To view an orthographic projection, click the Use Orthographic Projection button . An *orthographic projection* effectively removes a dimension, preserving the size ratio between objects but giving the 3D model a less realistic appearance. Click the button again to use perspective projection.
- To turn lighting on or off or to change lighting, choose an option from the Enable Extra Lighting pop-up menu .
- To change the background color, click the arrow next to the Background Color swatch and choose a color.

***Note:** Model rendering modes, lighting schemes, and background color options are also available by right-clicking/Control-clicking the 3D model. Model rendering modes also appear under the Options menu on the Model Tree.*

See also

"Examples of model rendering modes" on page 390

Model Tree overview

The Model Tree appears in the navigation pane on the left side of the work area. You can also open the Model Tree by clicking the Toggle Model Tree button on the 3D toolbar, or by right-clicking/Control-clicking the 3D model and choosing Show Model Tree.

***Note:** Using the Model Tree requires version 7.0.7 or later of either Acrobat or Adobe Reader. Users with earlier versions can interact with 3D models but not with the Model Tree.*

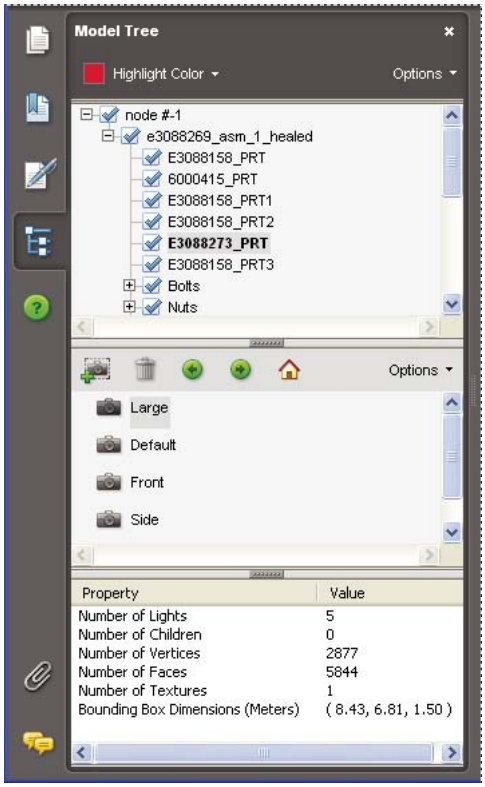
The Model Tree has three panes, each of which displays a specific type of information or controls.

Structure pane The topmost pane shows the tree structure of the 3D object. For example, a 3D object depicting a car may have separate groups of objects (called *nodes*) for the chassis, engine, and wheels. In this pane, you can move through the hierarchy and select, isolate, or hide various parts.

Product Manufacturing Information (PMI) appears as a group of items on the same hierarchical level as its related object or assembly.

View pane The middle pane lists the defined views, which you can add to and edit. For example, after you isolate and rotate a part, you can save that particular view. After making other transformations, you can simply click the view you created to return the 3D model to the view that you saved earlier. See "Set 3D views" on page 397.

Object Data pane The lower pane displays other information, including properties and metadata, if any, about the object or part. You cannot edit this information for 3D objects in Acrobat.



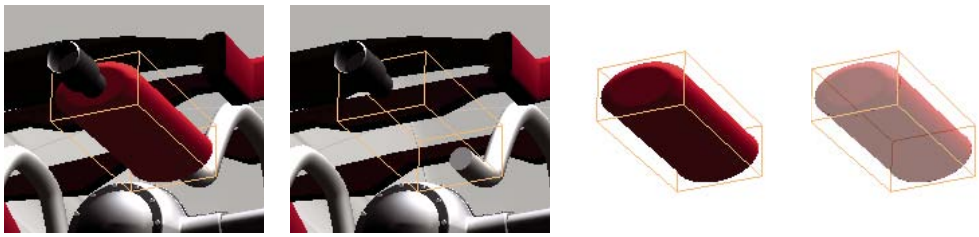
Model Tree
***A.** 3D object's hierarchy **B.** Saved views **C.** Part or object information*

***Note:** You can change the default behavior for the Model Tree by choosing Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS), selecting 3D under Categories, and then choosing an option from the Open Model Tree On 3D Activation menu.*

In some instances, the author of the PDF can set up a 3D model in the conversion settings so that clicking it automatically displays the Model Tree.

Hide, isolate, and change the appearance of parts

Some 3D models are composed of individual parts. You can use the Model Tree to hide or isolate parts, zoom in to parts, or make parts transparent. Parts that show in the 3D model appear in the tree with a check mark next to them.



Manipulating parts
***A.** Selected part **B.** Hidden part **C.** Isolated part **D.** Transparent part*

1 In the 3D model, use the Hand tool to click the part you want to manipulate. If a preference setting prevents you from using the Hand tool, use the Object Data tool (Tools > Object Data > Object Data Tool) to select parts. Or, select the part in the Model Tree list.

2 From the Options menu in the top pane of the Model Tree, choose any of the following:

***Note:** The items that appear on the Options menu and the order in which they are listed depend on whether the selected 3D model is composed of just one part or multiple parts. Many of these options are also available by right-clicking/Control-clicking a part in the 3D model.*

Model Render Mode Changes the surface appearance of the entire 3D model according to the item you choose from the submenu: Transparent Bounding Box, Solid, Transparent, Solid Wireframe, and so on.

Show All Parts Displays the entire 3D model.

Fit Visible Displays all visible parts and centers them in the view.

Display Bounding Box Displays the box that encloses the 3D object or selected parts of the model.

Set Bounding Box Color Changes the color of the bounding box. Choose this option, select a color, and then click OK.

Hide Displays the model without showing the selected parts. You can also select and deselect check boxes in the top pane of the Model Tree to hide and show different parts.

Isolate Displays only the selected part, hiding all others.

Zoom To Part Changes the center focus from the entire 3D model to the selected parts. This setting is especially useful for rotating a part, allowing the rotation to occur around the part's center focus rather than that of the entire model.

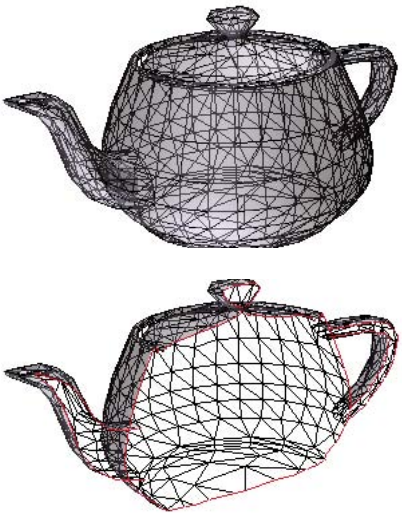
Transparent Displays a see-through version of the selected part.

Export As XML Creates a separate XML file of either Whole Tree or Current Node of the 3D model.

***Note:** If the 3D model was created to include Product Manufacturing Information (PMI), options for showing and hiding the PMI may be available on this menu.*

Create cross sections

Displaying a cross section of a 3D model is like cutting it in half and looking inside. Use the Cross Section Controls dialog box to adjust the alignment, offset, and tilt of the cutting plane.



Before and after cross section

1 Click the Toggle Cross Section icon on the 3D toolbar to turn on or off the cross section.

2 (Optional) Click the arrow next to the Toggle Cross Section icon, and choose Cross Section Properties, which opens the Cross Section Controls dialog box. Then do any of the following:

- Change settings under Alignment, Display Settings, and Position And Orientation.
- Click the Save Section View button to save the current cross-sectional view. (The saved view will appear on the Views menu in the 3D toolbar and in the View pane of the Model Tree with a default name, SectionView*[n]*.)

Cross Section Controls options

Changes you make here are applied immediately. To see these changes, make sure that the Cross Section Controls window does not block your view of the active 3D model. The Cross Section Controls window remains on top if you focus or interact with the underlying PDF. To close it, click the Close button in the upper right corner.

Enable Cross Section When selected, makes the other options available.

Alignment Determines the axis (*x, y,* or *z)* to which the cross section aligns.

Align To Face Cuts the cross section on a plane defined by the surface of any face that you then click in the 3D model.

Align To 3 Points Cuts the cross section on a plane defined by any three points that you click on the 3D model.

Show Intersections Indicates where the cutting plane slices the 3D model by adding a colored outline. Click the color swatch if you want to select a different color.

Show Cutting Plane Displays the two-dimensional field that cuts the 3D model. Click the color swatch if you want to select a different color, and enter a different percentage if you want to change the opacity of the plane.

Align Camera With Cutting Plane Rotates the 3D model so that it's level with the cross section's cutting plane.

Offset Determines how much of the 3D model is sliced. Drag the slider left or right, or change the percentage.

To understand how each axis divides the 3D model, select an axis and then drag the Offset slider back and forth and observe the changes in the embedded 3D model.

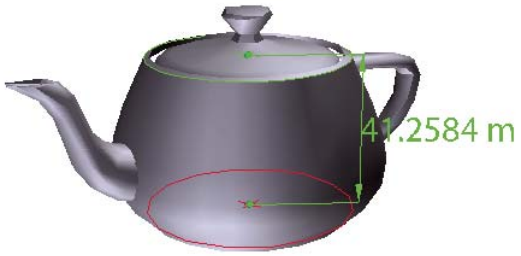
Flip Reverses the cross section. For example, if the top half of the model is cut off in the cross section, clicking Flip displays the top half and cuts off the bottom half.

Tilt sliders Determine the angles between the cutting plane and the axes. Drag the sliders left or right, or change the percentages.

Save Section View Adds the current cross-sectional view to the lists in the 3D toolbar and Model Tree, where you can select it to return the model to this view. The saved view is given a default name, SectionView*[n]*.

Measure 3D objects

Use the 3D Measurement Tool to measure 3D models. You can create measurements between combinations of points or edges of the 3D model. As you move the pointer over the 3D model, specific points and edges are highlighted. The 3D Measurement Tool supports four types of measurements: perpendicular distance between two straight edges, linear distance between two points, the radius of circular edges, and the angle between two edges (or three points). You can also display comments while taking measurements. However, these comments (also called measurement markups) are not preserved after the document is closed.



3D measurement display

1 Click a 3D model in a PDF to enable it.

2 Click the 3D Measurement Tool icon on the 3D toolbar. (If the 3D toolbar view is set for consolidated tools, the 3D Measurement tool is available on the pop-up menu under the Rotate, Spin, Pan, Zoom, or Walk tool.)

3 Select the options you want in the Snap Enables, Measurement Types, and Units And Markup Settings areas of the 3D Measurement Tool palette.

4 Under Units And Markup Settings, change the options, as needed. Leave the 3D Measurement Tool palette open.

5 Measure the 3D model:

- To measure the distance between two positions on the 3D model, click to set a start point and move the pointer to another location or an edge.
- To measure the circumference of a round shape, move the pointer to the edge of the shape so that a circle appears, and click once.
- To create and set the position of an annotation on the measurement, select Measurement Markup in the 3D Measurement Tool palette and then type a markup message in Annotation. Measure the 3D model as described above, but click to set the end point for the measurement and then click a third time to set the location of the measurement and annotation text.
- To discontinue a measurement, right-click/Control-click and choose Cancel Measurement.
- To delete a measurement markup, click it with the 3D Measurement Tool and press Delete.

While you measure, you can Alt-drag/Command-drag to rotate. Hold down Shift and drag to pan. Hold down Alt+Shift/Command+Shift and drag to zoom. Hold down Ctrl to disable snap.

Snap Enables options in the 3D Measurement Tool palette

3D Snap To Edge Endpoints Snaps to the entire edge.

3D Snap To Linear Edges Snaps to a straight-line segment of an edge.

3D Snap To Radial Edges Snaps to a circumference.

3D Snap To Silhouettes Snaps to the apparent edge of a part, such as the side of a cylinder.

3D Snap To Planar Faces Snaps to the geometric plane making up a face of the part.

Measurement Types options in the 3D Measurement Tool palette

3D Point To Point Measurement Measures the distance between two positions on the 3D model that you click to set a start point and then click another location to set an end point or edge.

3D Perpendicular Dimension Measures the distance between two edges taken at a right angle to the starting edge.

3D Radial Dimension Measures the radius at the location clicked.

3D Angle Measurement Measures the angle between two edges.

Units And Markup options in the 3D Measurement Tool palette

Note: *If you do not see these settings, choose Show Details on the palette's Options menu.*

Model Units Scale Ratio Shows the relationship between units in the model and real object measurements. Use the Display Units menu to select a different unit for the real object measurements.

Measurement Markup Select to have the measurements appear as comments in the PDF.

Label Type text that you want to appear with the measurement, both in the 3D model area and in the Comments panel. (Not available if Measurement Markup is not selected.)

3D Measurement Tool viewing options

Use the Options menu in the 3D Measurement tool palette to set viewing options.

Note: *The 3D Measurement Tool palette changes to the Distance Tool palette after a brief delay when the pointer moves outside the canvas area of the 3D model. Moving the pointer back over the 3D model restores the 3D Measurement Tool options. The Ortho option is available only for the 2D Distance, Perimeter, and Area tools.*

Show Details Shows or hides the Cursor Location and Units And Markup Settings options in the 3D Measurement Tool palette.

Show Rulers Shows or hides vertical and horizontal rulers on the page. (Has the same effect as choosing View > Rulers.)

Snap To 2D Content Ensures precise measurement in 2D objects.

Snap To 3D Content Ensures precise measurement in 3D objects

3D Measurement Navigation Tips Opens a dialog box with keyboard shortcuts for several 3D features. You can use these shortcuts while you are measuring.

Measuring preferences

Change the 3D Measuring preferences to determine how 3D data is measured. These options appear in the Measuring (3D) panel of the Preferences dialog box.

Use Scales And Units From Model (When Present) Displays measurements based on the model units, if present, generated from the original 3D model. Deselect this option to specify the units of measurements manually. This setting can be changed in the 3D Measurement Tool palette.

Use Default Display Unit Uses units of measurement that you specify here rather than those in the 3D model.

Significant Digits To Display Specifies the maximum number of digits in the measurement number.

3D Measuring Line Color Specifies the color of the line that appears when you click or drag to measure an object.

Measure Feedback Size Sets the text size for the measurement display.

Angular Measurements Shown In Specifies units as either degrees or radians.

Circular Measurements Shown As Designates whether the diameter or radius is measured for circular parts.

3D Snap Settings Turns on snap and specifies whether points, arcs, edges, silhouette edges, or faces are snapped to. Sensitivity indicates how close the pointer needs to be to the item being snapped to. For Snap Hint Color, specify the color of the snap line that appears when you hold the pointer over the 3D object.

Set 3D views

The default view of a 3D model lets you quickly revert to a starting point at any time as you interact with the model. A default view is different from a preview, which determines what the 3D model looks like when it's not activated. The list of all available views for the 3D model appears in the Views menu on the 3D toolbar and in the View pane of the Model Tree.

You can also create additional views of the 3D model in Acrobat that let you quickly navigate the 3D content as you want (such as top, bottom, left, right, inside, outside, exploded, or assembled). A view can include lighting, camera position, rendering mode, the Model Tree state, and transparency and cross section settings. When you add a comment or markup to the 3D model, Acrobat automatically creates a view.

You can link views to bookmarks in the Bookmarks panel, or you can use the Go To 3D View action to link views to buttons and links that you create on the page.

Create a new view

1. With the Hand tool, click the 3D model to enable it.
2. Use the Rotate, Pan, and Zoom tools in the 3D toolbar to change the view.
3. In the Model Tree, click the Create View icon .

Display a view

❖ Use these methods to change the view, as appropriate:

- From the 3D toolbar, select the view from the Views pop-up menu.
- In the Model Tree, click the view name.
- Click the Default View icon .

Change the default view

❖ In the View pane of the Model Tree, do one of the following:

- Select a view, and then choose Set As Default View from the Options menu.
- Right-click/Control-click a view, and then choose Set As Default View.

Add a 3D view to a bookmark or link

This process requires a 3D model with one or more defined views, which you can create. You can associate the view with an existing bookmark or link, or you can create a new one for this purpose.

1 Do one of the following:

- To create a new bookmark, click the New Bookmark button at the top of the Bookmarks panel, and type a new name for the bookmark. Then, right-click/Control-click it and choose Properties.
- To create a new link, choose Tools > Advanced Editing > Link Tool, and drag to create a link rectangle anywhere on the page. Then, under Link Action, in the Create Link dialog box, select Custom Link, and click Next.
- To link a view to an existing bookmark or link, right-click/Control-click the bookmark or link, and choose Properties.

2 In the Properties dialog box, click the Actions tab.

3 From the Select Action menu, choose Go To A 3D View, and then click Add.

4 In the Select A 3D View dialog box, select the 3D annotation for the 3D model from the list on the left, and then select a view option on the right:

Current View Matches the 3D rotation, pan, and zoom characteristics that are active in your document at the time you create the link or bookmark, whether or not this view is listed on the Model Tree as a defined view.

First View Changes to the view that appears at the top of the list in the Model Tree.

Last View Changes to the view definition that appears at the bottom of the list in the Model Tree.

Previous View Moves up the Model Tree list of defined views, one view at a time.

Next View Moves down the Model Tree list of defined views, one view at a time.

Named View Changes to the defined view that you select from the list appearing below this option.

5 (Optional) To make a bookmark or link also jump to a specific page and page view, choose Go To A Page View on the Selection Action menu, and click Add. Then use the scroll bars and zoom tools to adjust the page view before you click the Set Link button. When finished, click Close in the Properties dialog box.

Delete a 3D view

❖ Do one of the following:

- On the 3D toolbar, open the Views pop-up menu and choose Manage Views. Select the views you want to remove, and click Delete View.
- In the View pane of the Model Tree panel, select the views you want to remove. From within the View pane, either click the Delete button or click the Options button and choose Delete View.

3D preferences

In the 3D panel of the Preferences dialog box—Edit > Preferences (Windows) or Acrobat > Preferences (Mac OS)—you can determine whether the 3D toolbar and Model Tree are displayed by default. You can also specify a default renderer and determine whether animations are allowed.

Preferred Renderer Specifies the rendering engine used to affect both performance and quality, so it's important to select the appropriate renderer. Depending on your system, you may want to change your render engine. For Windows XP, you may be able to select DirectX 8, DirectX 9, or Software. For Mac OS 10.3 or later, you can select OpenGL or Software. If you select a DirectX or OpenGL option, all rendering takes place using the graphics chip on the video card. If Software is selected, rendering may take more time, but the performance may be more consistent with that of the model in its originating application.

Enable Double-Sided Rendering Some model parts have two sides. To save time and space, you can deselect this option to render only the side facing the user. If the user looks inside a part rendered with only one side, the back side would be invisible.

Preferred 3D PMI Rendering Mode Specifies the PMI mode to use for rendering. You can select one of the following options:

Use Content Setting—The rendering of the PMI uses the setting of each PMI to decide whether or not it uses the Z-buffer.

Always Render 3D PMI In Front Of Model—The rendering of the PMI ignores the Z-buffer regardless of the setting in the file.

Always Render 3D PMI Using Z-buffer—The rendering of the PMI always turns on Z-buffer regardless of the setting in the file.

Enable Hardware Rendering For Legacy Video Cards Forces the use of a hardware accelerator for even video cards that do not support a pixel shader.

Open Model Tree On 3D Activation Determines whether the Model Tree is displayed when the 3D model is activated. Choose Use Annotation's Setting to use whichever setting the author used when adding the 3D model to the PDF.

Default Toolbar State Determines whether the 3D toolbar is shown or hidden when a 3D model is activated. Choose Use Annotation's Setting to use whichever setting the author used when adding the 3D model to the PDF.

Enable Toggle For 3D Toolbar Control Places a triangular button over the selected 3D model that hides or displays the 3D toolbar.

Enable 3D Selection For The Hand Tool Lets the user select and highlight parts of the 3D model using the Hand tool. If this option is not selected, use the Object Data tool (Tools > Object Data > Object Data Tool) to select the object.

Consolidate 3D Tools On The 3D Toolbar Selecting this option places the manipulation and navigation tools under the Rotate tool, thereby shortening the 3D toolbar.

Enable View Transitions Some 3D models include animated transitions between views. Deselect this option if you want to prevent this 3D animation.

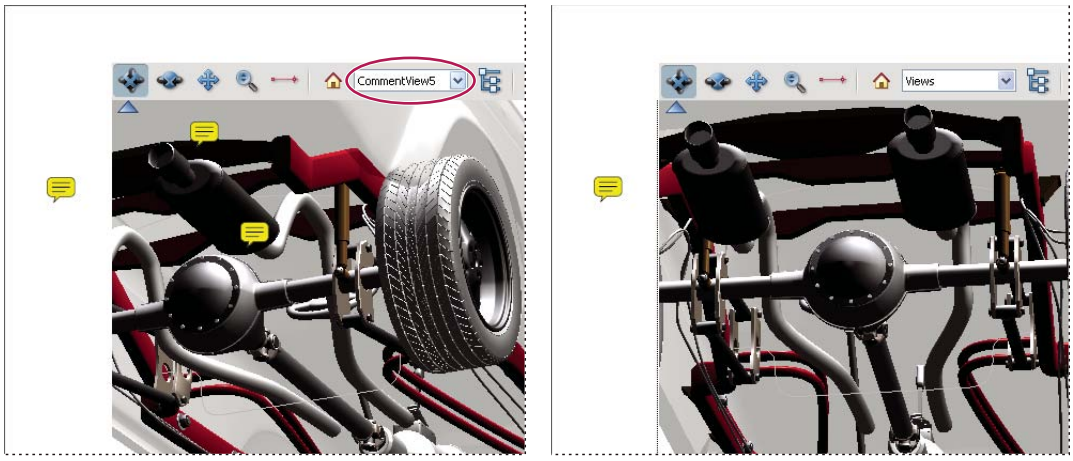
Optimization Scheme For Low Framerate Specifies what happens to animations of complex models when the framerate becomes low. None does not compromise the visuals and leaves the framerate low. Bounding Box shows the three-dimensional planes enclosing the parts instead of the parts themselves, which keeps the framerate high. Drop Objects does not show some parts of the model in order to keep the framerate high.

Framerate Threshold Sets the minimum framerate, either by dragging the slider or entering a number in the value box. If the framerate drops below that number of frames per second, the Optimization Scheme For Low Framerate option goes into effect.

Comment on 3D designs

Comments added to a 3D object are associated with specific views that are defined when the comments are added. If the view is changed—for example, if the 3D object is rotated or moved—the comments are no longer visible.

Note: *Adding comments to 3D model views requires version 7.0.7 or later of Acrobat or Reader.*



When the view of a 3D object is changed, any comment associated with that object disappears (right).

If you don't want a comment to be associated with a 3D view, add the comment to another part of the page, outside the 3D object area.

See also

"Enable commenting for Adobe Reader users" on page 155

"Commenting" on page 168

Add comments to a 3D object

Note: *Adobe Reader users can add comments to a PDF if the document author enables commenting for that PDF.*

1 Select a tool from the Comment & Markup toolbar. (The Text Edit tools have no effect on 3D objects.)

2 Click inside the 3D object area to create a new comment and also a new view definition in the Model Tree with a default name such as "CommentView1."

3 To add more comments, do one of the following:

- To create an additional comment in a view, make sure that the commenting view you want is selected in the Model Tree, and click inside the 3D object area.
- To create an additional comment in a new commenting view, make sure that no commenting view is selected in the Model Tree, and click inside the 3D object area.

Note: *If you delete one of these automatically generated commenting views, the associated comments are still available. You can view and select them in the Comments panel or in the Model Tree, where they are listed under the views. Selecting a comment switches the 3D model to the same viewing configuration it had when the comment was added.*

Display comments for a 3D object

1 Do one of the following:

- In the Model Tree, select a view that contains comments.
- Click the Comments button or choose View > Navigation Panels > Comments.
- In the View pane of the Model Tree, click Options and choose List Comments.

2 Double-click a comment to open its comment window.

3 Repeat steps 1 and 2 as needed to see other comments associated with other views.

When you select a comment, the 3D model appears in the same viewing configuration it had when the comment was added, whether or not that view has been deleted from the list.

Run a JavaScript

If there is a separate JavaScript file associated with the 3D model PDF, you can activate it.

1 Open the PDF in Acrobat.

2 Right-click/Control-click the 3D model in the PDF, and choose Run JavaScript.

Chapter 14: Color management

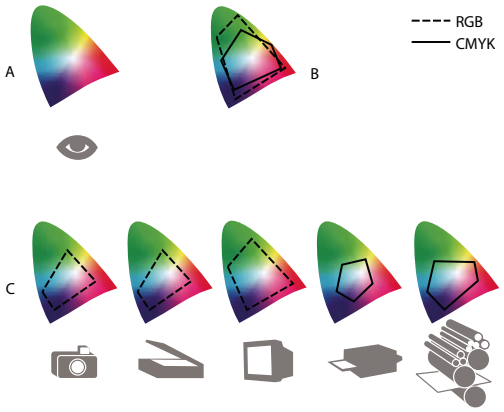
Understanding color management

Why colors sometimes don't match

No device in a publishing system is capable of reproducing the full range of colors viewable to the human eye. Each device operates within a specific color space that can produce a certain range, or *gamut*, of colors.

A color model determines the relationship between values, and the color space defines the absolute meaning of those values as colors. Some color models (such as CIE L*a*b) have a fixed color space because they relate directly to the way humans perceive color. These models are described as being *device-independent*. Other color models (RGB, HSL, HSB, CMYK, and so forth) can have many different color spaces. Because these models vary with each associated color space or device, they are described as being *device-dependent*.

Because of these varying color spaces, colors can shift in appearance as you transfer documents between different devices. Color variations can result from differences in image sources; the way software applications define color; print media (newsprint paper reproduces a smaller gamut than magazine-quality paper); and other natural variations, such as manufacturing differences in monitors or monitor age.



Color gamuts of various devices and documents
***A.** Lab color space **B.** Documents (working space) **C.** Devices*

What is a color management system?

Color-matching problems result from various devices and software using different color spaces. One solution is to have a system that interprets and translates color accurately between devices. A color management system (CMS) compares the color space in which a color was created to the color space in which the same color will be output, and makes the necessary adjustments to represent the color as consistently as possible among different devices.

A color management system translates colors with the help of *color profiles*. A profile is a mathematical description of a device's color space. For example, a scanner profile tells a color management system how your scanner "sees" colors. Adobe color management uses ICC profiles, a format defined by the International Color Consortium (ICC) as a cross-platform standard.

Because no single color-translation method is ideal for all types of graphics, a color management system provides a choice of *rendering intents*, or translation methods, so that you can apply a method appropriate to a particular graphics element. For example, a color translation method that preserves correct relationships among colors in a wildlife photograph may alter the colors in a logo containing flat tints of color.

Note: *Don't confuse color management with color correction. A color management system won't correct an image that was saved with tonal or color balance problems. It provides an environment where you can evaluate images reliably in the context of your final output.*

See also

"About color profiles" on page 414

"About rendering intents" on page 423

Do you need color management?

Without a color management system, your color specifications are device-dependent. You might not need color management if your production process is tightly controlled for one medium only. For example, you or your print service provider can tailor CMYK images and specify color values for a known, specific set of printing conditions.

The value of color management increases when you have more variables in your production process. Color management is recommended if you anticipate reusing color graphics for print and online media, using various kinds of devices within a single medium (such as different printing presses), or if you manage multiple workstations.

You will benefit from a color management system if you need to accomplish any of the following:

- Get predictable and consistent color output on multiple output devices including color separations, your desktop printer, and your monitor. Color management is especially useful for adjusting color for devices with a relatively limited gamut, such as a four-color process printing press.
- Accurately soft-proof (preview) a color document on your monitor by making it simulate a specific output device. (Soft-proofing is subject to the limitations of monitor display, and other factors such as room lighting conditions.)
- Accurately evaluate and consistently incorporate color graphics from many different sources if they also use color management, and even in some cases if they don't.
- Send color documents to different output devices and media without having to manually adjust colors in documents or original graphics. This is valuable when creating images that will eventually be used both in print and online.
- Print color correctly to an unknown color output device; for example, you could store a document online for consistently reproducible on-demand color printing anywhere in the world.

Creating a viewing environment for color management

Your work environment influences how you see color on your monitor and on printed output. For best results, control the colors and light in your work environment by doing the following:

- View your documents in an environment that provides a consistent light level and color temperature. For example, the color characteristics of sunlight change throughout the day and alter the way colors appear on your screen, so keep shades closed or work in a windowless room. To eliminate the blue-green cast from fluorescent lighting, you can install D50 (5000° Kelvin) lighting. You can also view printed documents using a D50 lightbox.

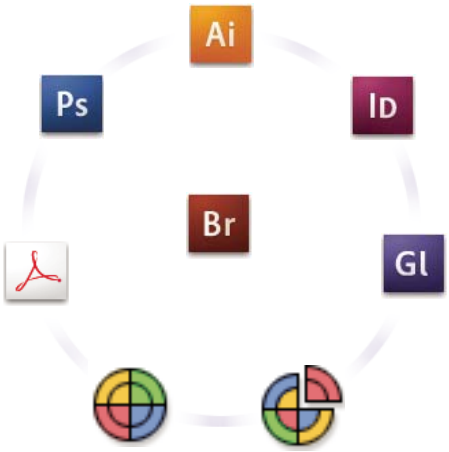
- View your document in a room with neutral-colored walls and ceiling. A room's color can affect the perception of both monitor color and printed color. The best color for a viewing room is neutral gray. Also, the color of your clothing reflecting off the glass of your monitor may affect the appearance of colors on-screen.
- Remove colorful background patterns on your monitor desktop. Busy or bright patterns surrounding a document interfere with accurate color perception. Set your desktop to display neutral grays only.
- View document proofs in the real-world conditions under which your audience will see the final piece. For example, you might want to see how a housewares catalog looks under the incandescent light bulbs used in homes, or view an office furniture catalog under the fluorescent lighting used in offices. However, always make final color judgements under the lighting conditions specified by the legal requirements for contract proofs in your country.

Keeping colors consistent

About color management in Adobe applications

Adobe color management helps you maintain the appearance of colors as you bring images in from external sources, edit documents and transfer them between Adobe applications, and output your finished compositions. This system is based on conventions developed by the International Color Consortium, a group responsible for standardizing profile formats and procedures so that consistent and accurate color can be achieved throughout a workflow.

By default, color management is turned on in color-managed Adobe applications. If you purchased the Adobe Creative Suite, color settings are synchronized across applications to provide consistent display for RGB and CMYK colors. This means that colors look the same no matter which application you view them in.



Color settings for Adobe Creative Suite are synchronized in a central location through Adobe Bridge.

If you decide to change the default settings, easy-to-use presets let you configure Adobe color management to match common output conditions. You can also customize color settings to meet the demands of your particular color workflow.

Keep in mind that the kinds of images you work with and your output requirements influence how you use color management. For example, there are different color-consistency issues for an RGB photo printing workflow, a CMYK commercial printing workflow, a mixed RGB/CMYK digital printing workflow, and an Internet publishing workflow.

Basic steps for producing consistent color

1. Consult with your production partners (if you have any) to ensure that all aspects of your color management workflow integrate seamlessly with theirs.

Discuss how the color workflow will be integrated with your workgroups and service providers, how software and hardware will be configured for integration into the color management system, and at what level color management will be implemented. (See "Do you need color management?" on page 403.)

2. Calibrate and profile your monitor.

A monitor profile is the first profile you should create. Seeing accurate color is essential if you are making creative decisions involving the color you specify in your document. (See "Calibrate and profile your monitor" on page 416.)

3. Add color profiles to your system for any input and output devices you plan to use, such as scanners and printers.

The color management system uses profiles to know how a device produces color and what the actual colors in a document are. Device profiles are often installed when a device is added to your system. You can also use third-party software and hardware to create more accurate profiles for specific devices and conditions. If your document will be commercially printed, contact your service provider to determine the profile for the printing device or press condition. (See "About color profiles" on page 414 and "Install a color profile" on page 416.)

4. Set up color management in Adobe applications.

The default color settings are sufficient for most users. However, you can change the color settings by doing one of the following:

- If you use multiple Adobe applications, use Adobe® Bridge CS3 to choose a standard color management configuration and synchronize color settings across applications before working with documents. (See "Synchronize color settings across Adobe applications" on page 406.)
- If you use only one Adobe application, or if you want to customize advanced color management options, you can change color settings for a specific application. (See "Set up color management" on page 406.)

5. (Optional) Preview colors using a soft proof.

After you create a document, you can use a soft proof to preview how colors will look when printed or viewed on a specific device. (See "Soft-proofing colors" on page 410.)

Note: *A soft proof alone doesn't let you preview how overprinting will look when printed on an offset press. If you work with documents that contain overprinting, turn on Overprint Preview to accurately preview overprints in a soft proof.*

6. Use color management when printing and saving files.

Keeping the appearance of colors consistent across all of the devices in your workflow is the goal of color management. Leave color management options enabled when printing documents, saving files, and preparing files for online viewing. (See "Printing with color management" on page 412 and "Color-managing documents for online viewing" on page 409.)

Synchronize color settings across Adobe applications

If you use Adobe Creative Suite, you can use Adobe Bridge to automatically synchronize color settings across applications. This synchronization ensures that colors look the same in all color-managed Adobe applications.

If color settings are not synchronized, a warning message appears at the top of the Color Settings dialog box in each application. Adobe recommends that you synchronize color settings before you work with new or existing documents.

1 Open Bridge.

To open Bridge from a Creative Suite application, choose File > Browse. To open Bridge directly, either choose Adobe Bridge from the Start menu (Windows) or double-click the Adobe Bridge icon (Mac OS).

2 Choose Edit > Creative Suite Color Settings.

3 Select a color setting from the list, and click Apply.

If none of the default settings meet your requirements, select Show Expanded List Of Color Setting Files to view additional settings. To install a custom settings file, such as a file you received from a print service provider, click Show Saved Color Settings Files.

Set up color management

1 Do one of the following:

- (Illustrator, InDesign, Photoshop) Choose Edit > Color Settings.
- (Acrobat) Select the Color Management category of the Preferences dialog box.

2 Select a color setting from the Settings menu, and click OK.

The setting you select determines which color working spaces are used by the application, what happens when you open and import files with embedded profiles, and how the color management system converts colors. To view a description of a setting, select the setting and then position the pointer over the setting name. The description appears at the bottom of the dialog box.

Note: *Acrobat color settings are a subset of those used in InDesign, Illustrator, and Photoshop.*

In certain situations, such as if your service provider supplies you with a custom output profile, you may need to customize specific options in the Color Settings dialog box. However, customizing is recommended for advanced users only.

Note: *If you work with more than one Adobe application, it is highly recommended that you synchronize your color settings across applications. (See "Synchronize color settings across Adobe applications" on page 406.)*

See also

"Customize color settings" on page 419

Change the appearance of CMYK black (Illustrator, InDesign)

Pure CMYK black (K=100) appears jet black (or rich black) when viewed on-screen, printed to a non-PostScript desktop printer, or exported to an RGB file format. If you prefer to see the difference between pure black and rich black as it will appear when printed on a commercial press, you can change the Appearance Of Black preferences. These preferences do not change the color values in a document.

1 Choose Edit > Preferences > Appearance Of Black (Windows) or [*application name*] > Preferences > Appearance Of Black (Mac OS).

2 Choose an option for On Screen:

Display All Blacks Accurately Displays pure CMYK black as dark gray. This setting allows you to see the difference between pure black and rich black.

Display All Blacks As Rich Black Displays pure CMYK black as jet black (RGB=000). This setting makes pure black and rich black appear the same on-screen.

3 Choose an option for Printing/Exporting:

Output All Blacks Accurately When printing to a non-PostScript desktop printer or exporting to an RGB file format, outputs pure CMYK black using the color numbers in the document. This setting allows you to see the difference between pure black and rich black.

Output All Blacks As Rich Black When printing to a non-PostScript desktop printer or exporting to an RGB file format, outputs pure CMYK black as jet black (RGB=000). This setting makes pure black and rich black appear the same.

Managing process and spot colors

When color management is on, any color you apply or create within a color-managed Adobe application automatically uses a color profile that corresponds to the document. If you switch color modes, the color management system uses the appropriate profiles to translate the color to the new color model you choose.

Keep in mind the following guidelines for working with process and spot colors:

- Choose a CMYK working space that matches your CMYK output conditions to ensure that you can accurately define and view process colors.
- Select colors from a color library. Adobe applications come with several standard color libraries, which you can load using the Swatches panel menu.
- (Acrobat, Illustrator, and InDesign) Turn on Overprint Preview to get an accurate and consistent preview of spot colors.
- (Acrobat, Illustrator, and InDesign) Use Lab values (the default) to display predefined spot colors (such as colors from the TOYO, PANTONE, DIC, and HKS libraries) and convert these colors to process colors. Using Lab values provides the greatest accuracy and guarantees the consistent display of colors across Creative Suite applications. If you want the display and output of these colors to match earlier versions of Illustrator or InDesign, use CMYK equivalent values instead. For instructions on switching between Lab values and CMYK values for spot colors, search Illustrator or InDesign Help.

Note: *Color-managing spot colors provides a close approximation of a spot color on your proofing device and monitor. However, it is difficult to exactly reproduce a spot color on a monitor or proofing device because many spot color inks exist outside the gamuts of many of those devices.*

Color-managing imported images

Color-managing imported images (Illustrator, InDesign)

How imported images are integrated into a document's color space depends on whether or not the image has an embedded profile:

- When you import an image that contains no profile, the Adobe application uses the current document profile to define the colors in the image.

- When you import an image that contains an embedded profile, color policies in the Color Settings dialog box determine how the Adobe application handles the profile.

See also

"Color management policy options" on page 421

Using a safe CMYK workflow

A safe CMYK workflow ensures that CMYK color numbers are preserved all the way to the final output device, as opposed to being converted by your color management system. This workflow is beneficial if you want to incrementally adopt color management practices. For example, you can use CMYK profiles to soft-proof and hard-proof documents without the possibility of unintended color conversions occurring during final output.

Illustrator and InDesign support a safe CMYK workflow by default. As a result, when you open or import a CMYK image with an embedded profile, the application ignores the profile and preserves the raw color numbers. If you want your application to adjust color numbers based on an embedded profile, change the CMYK color policy to Preserve Embedded Profiles in the Color Settings dialog box. You can easily restore the safe CMYK workflow by changing the CMYK color policy back to Preserve Numbers (Ignore Linked Profiles).

You can override safe CMYK settings when you print a document or save it to Adobe PDF. However, doing so may cause colors to be reseparated. For example, pure CMYK black objects may be reseparated as rich black. For more information on color management options for printing and saving PDFs, search in Help.

See also

"Color management policy options" on page 421

Preparing imported graphics for color management

Use the following general guidelines to prepare graphics for being color-managed in Adobe applications:

- Embed an ICC-compliant profile when you save the file. The file formats that support embedded profiles are JPEG, PDF, PSD (Photoshop), AI (Illustrator), INDD (InDesign), Photoshop EPS, Large Document Format, and TIFF.
- If you plan to reuse a color graphic for multiple final output devices or media, such as for print, video, and the web, prepare the graphic using RGB or Lab colors whenever possible. If you must save in a color model other than RGB or Lab, keep a copy of the original graphic. RGB and Lab color models represent larger color gamuts than most output devices can reproduce, retaining as much color information as possible before being translated to a smaller output color gamut.

See also

"Embed a color profile" on page 417

View or change profiles for imported bitmap images (InDesign)

InDesign allows you to view, override, or disable profiles for imported bitmap images. This may be necessary when you are importing an image containing no profile or an incorrectly embedded profile. For example, if the scanner manufacturer's default profile was embedded but you have since generated a custom profile, you can assign the newer profile.

1 Do one of the following:

- If the graphic is already in layout, select it and choose Object > Image Color Settings.
- If you're about to import the graphic, choose File > Place, select Show Import Options, select and open the file, and then select the Color tab.

2 For Profile, choose the source profile to apply to the graphic in your document. If a profile is currently embedded, the profile name appears at the top of the Profile menu.

3 (Optional) Choose a rendering intent, and then click OK. In most cases, it's best to use the default rendering intent.

Note: *You can also view or change profiles for objects in Acrobat.*

See also

"Convert document colors to another profile" on page 419

"Convert document colors to another profile (Photoshop)" on page 418

Color-managing documents for online viewing

Color-managing documents for online viewing

Color management for online viewing is very different from color management for printed media. With printed media, you have far more control over the appearance of the final document. With online media, your document will appear on a wide range of possibly uncalibrated monitors and video display systems, significantly limiting your control over color consistency.

When you color-manage documents that will be viewed exclusively on the web, Adobe recommends that you use the sRGB color space. sRGB is the default working space for most Adobe color settings, but you can verify that sRGB is selected in the Color Settings dialog box (Photoshop, Illustrator, InDesign) or the Color Management preferences (Acrobat). With the working space set to sRGB, any RGB graphics you create will use sRGB as the color space.

When working with images that have an embedded color profile other than sRGB, you should convert the image's colors to sRGB before you save the image for use on the web. If you want the application to automatically convert the colors to sRGB when you open the image, select Convert To Working Space as the RGB color management policy. (Make sure that your RGB working space is set to sRGB.) In Photoshop and InDesign, you can also manually convert the colors to sRGB using the Edit > Convert To Profile command.

Note: *In InDesign, the Convert To Profile command only converts colors for native, not placed, objects in the document.*

See also

"About color working spaces" on page 419

"Color management policy options" on page 421

Color-managing PDFs for online viewing

When you export PDFs, you can choose to embed profiles. PDFs with embedded profiles reproduce color consistently in Acrobat 4.0 or later running under a properly configured color management system.

Keep in mind that embedding color profiles increases the size of PDFs. RGB profiles are usually small (around 3 KB); however, CMYK profiles can range from 0.5 to 2 MB.

See also

"Printing with color management" on page 412

"Color-managing PDFs for printing" on page 413

Color-managing HTML documents for online viewing

Many web browsers do not support color management. Of the browsers that do support color management, not all instances can be considered color-managed because they may be running on systems where the monitors are not calibrated. In addition, few web pages contain images with embedded profiles. If you manage a highly controlled environment, such as the intranet of a design studio, you may be able to achieve some degree of HTML color management for images by equipping everyone with a browser that supports color management and calibrating all monitors.

You can approximate how colors will look on uncalibrated monitors by using the sRGB color space. However, because color reproduction varies among uncalibrated monitors, you still won't be able to anticipate the true range of potential display variations.

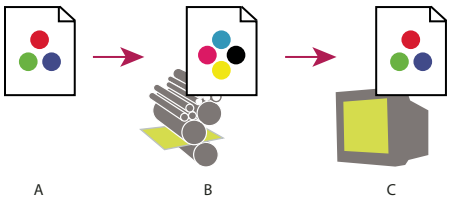
Proofing colors

Soft-proofing colors

In a traditional publishing workflow, you print a hard proof of your document to preview how its colors will look when reproduced on a specific output device. In a color-managed workflow, you can use the precision of color profiles to soft-proof your document directly on the monitor. You can display an on-screen preview of how your document's colors will look when reproduced on a particular output device.

Keep in mind that the reliability of the soft proof depends upon the quality of your monitor, the profiles of your monitor and output devices, and the ambient lighting conditions of your work environment.

Note: *A soft proof alone doesn't let you preview how overprinting will look when printed on an offset press. If you work with documents that contain overprinting, turn on Overprint Preview to accurately preview overprints in a soft proof.*



Using a soft proof to preview the final output of a document on your monitor
A. *Document is created in its working color space.* ***B.*** *Document's color values are translated to color space of chosen proof profile (usually the output device's profile).* ***C.*** *Monitor displays proof profile's interpretation of document's color values.*

Soft-proof colors

1 Choose View > Proof Setup, and do one of the following:

- Choose a preset that corresponds to the output condition you want to simulate.
- Choose Custom (Photoshop and InDesign) or Customize (Illustrator) to create a custom proof setup for a specific output condition. This option is recommended for the most accurate preview of your final printed piece.

2 Choose View > Proof Colors to toggle the soft-proof display on and off. When soft proofing is on, a check mark appears next to the Proof Colors command, and the name of the proof preset or profile appears at the top of the document window.

To compare the colors in the original image and the colors in the soft proof, open the document in a new window before you set up the soft proof.

Soft-proof presets

Working CMYK Creates a soft proof of colors using the current CMYK working space as defined in the Color Settings dialog box.

Document CMYK (InDesign) Creates a soft proof of colors using the document's CMYK profile.

Working Cyan Plate, Working Magenta Plate, Working Yellow Plate, Working Black Plate, or Working CMY Plates (Photoshop) Creates a soft proof of specific CMYK ink colors using the current CMYK working space.

Macintosh RGB or Windows RGB (Photoshop and Illustrator) Creates a soft proof of colors in an image using either a standard Mac OS or Windows monitor as the proof profile space to simulate. Both options assume that the simulated device will display your document without using color management. Neither option is available for Lab or CMYK documents.

Monitor RGB (Photoshop and Illustrator) Creates a soft proof of colors in an RGB document using your current monitor color space as the proof profile space. This option assumes that the simulated device will display your document without using color management. This option is unavailable for Lab and CMYK documents.

Custom soft-proof options

Device To Simulate Specifies the color profile of the device for which you want to create the proof. The usefulness of the chosen profile depends on how accurately it describes the device's behavior. Often, custom profiles for specific paper and printer combinations create the most accurate soft proof.

Preserve CMYK Numbers or Preserve RGB Numbers Simulates how the colors will appear without being converted to the color space of the output device. This option is most useful when you are following a safe CMYK workflow.

Rendering Intent (Photoshop and Illustrator) When the Preserve Numbers option is deselected, specifies a rendering intent for converting colors to the device you are trying to simulate.

Use Black Point Compensation (Photoshop) Ensures that the shadow detail in the image is preserved by simulating the full dynamic range of the output device. Select this option if you plan to use black point compensation when printing (which is recommended in most situations).

Simulate Paper Color Simulates the dingy white of real paper, according to the proof profile. Not all profiles support this option.

Simulate Black Ink Simulates the dark gray you really get instead of a solid black on many printers, according to the proof profile. Not all profiles support this option.

In Photoshop, if you want the custom proof setup to be the default proof setup for documents, close all document windows before choosing the View > Proof Setup > Custom command.

Save or load a custom proof setup

1 Choose View > Proof Setup > Custom.

2 Do either of the following:

- To save a custom proof setup, click Save. To ensure that the new preset appears in the View > Proof Setup menu, save the preset in the default location.
- To load a custom proof setup, click Load.

Soft-proof colors (Acrobat)

1 Choose Advanced > Print Production > Output Preview.

2 Choose the color profile of a specific output device from the Simulation Profile menu.

3 Choose a soft-proof option:

Simulate Black Ink Simulates the dark gray you really get instead of a solid black on many printers, according to the proof profile. Not all profiles support this option.

Simulate Paper Color Simulates the dingy white of real paper, according to the proof profile. Not all profiles support this option.

Color-managing documents when printing

Printing with color management

Color management options for printing let you specify how you want Adobe applications to handle the outgoing image data so the printer will print colors consistent with what you see on your monitor. Your options for printing color-managed documents depend on the Adobe application you use, as well as the output device you select. In general, you have the following choices for handling colors during printing:

- Let the printer determine colors.
- Let the application determine colors.
- (Photoshop and InDesign) Do not use color management. In this workflow, no color conversion occurs. You may also need to turn off color management in your printer driver. This method is useful primarily for printing test targets or generating custom profiles.

Letting the printer determine colors when printing

In this workflow, the application does no color conversion, but sends all necessary conversion information to the output device. This method is especially convenient when printing to inkjet photo printers, because each combination of paper type, printing resolution, and additional printing parameters (such as high-speed printing) requires a different profile. Most new inkjet photo printers come with fairly accurate profiles built into the driver, so letting the printer select the right profile saves time and alleviates mistakes. This method is also recommended if you are not familiar with color management.

If you choose this method, it is very important that you set up printing options and turn on color management in your printer driver. Search Help for additional instructions.

If you select a PostScript printer, you can take advantage of *PostScript color management*. PostScript color management makes it possible to perform color composite output or color separations at the raster image processor (RIP)—a process called *in-RIP separations*—so that a program need only specify parameters for separation and let the device calculate the final color values. PostScript color-managed output workflows require an output device that supports PostScript color management using PostScript Level 2 version 2017 or later, or PostScript Lanuage Level 3.

Letting the application determine colors when printing

In this workflow, the application does all the color conversion, generating color data specific to one output device. The application uses the assigned color profiles to convert colors to the output device's gamut, and sends the resulting values to the output device. The accuracy of this method depends on the accuracy of the printer profile you select. Use this workflow when you have custom ICC profiles for each specific printer, ink, and paper combination.

If you choose this option, it is very important that you disable color management in your printer driver. Letting the application and the printer driver simultaneously manage colors during printing results in unpredictable color. Search Help for additional instructions.

Obtaining custom profiles for desktop printers

If the output profiles that come with your printer don't produce satisfactory results, you obtain custom profiles in the following ways:

- Purchase a profile for your type of printer and paper. This is usually the easiest and least expensive method.
- Purchase a profile for your specific printer and paper. This method involves printing a profiling target on your printer and paper, and providing that target to a company that will create a specific profile. This is more expensive than purchasing a standard profile, but can provide better results because it compensates for any manufacturing variations in printers.
- Create your own profile using a scanner-based system. This method involves using profile-creation software and your own flatbed scanner to scan the profiling target. It can provide excellent results for matte surface papers, but not glossy papers. (Glossy papers tend to have fluorescent brighteners in them that look different to a scanner than they do in room light.)
- Create your own profile using a hardware profile-creation tool. This method is expensive but can provide the best results. A good hardware tool can create an accurate profile even with glossy papers.
- Tweak a profile created using one of the previous methods with profile-editing software. This software can be complex to use, but it lets you correct problems with a profile or simply adjust a profile to produce results more to your taste.

See also

"Install a color profile" on page 416

Color-managing PDFs for printing

When you create Adobe PDFs for commercial printing, you can specify how color information is represented. The easiest way to do this is using a PDF/X standard; however, you can also specify color-handling options manually in the Output section of the PDF dialog box. For more information about PDF/X and how to create PDFs, search Help.

In general, you have the following choices for handling colors when creating PDFs:

- (PDF/X-3) Does not convert colors. Use this method when creating a document that will be printed or displayed on various or unknown devices. When you select a PDF/X-3 standard, color profiles are automatically embedded in the PDF.
- (PDF/X-1a) Converts all colors to the destination CMYK color space. Use this method if you want to create a press-ready file that does not require any further color conversions. When you select a PDF/X-1a standard, no profiles are embedded in the PDF.
- (Illustrator and InDesign) Converts colors that have embedded profiles to the destination color space, but preserves the numbers for those colors without embedded profiles. You can manually select this option in the Output section of the PDF dialog box. Use this method if the document contains CMYK images that aren't color-managed and you want to make sure that the color numbers are preserved.

Note: *All spot color information is preserved during color conversion; only the process color equivalents convert to the designated color space.*

See also

"Using a safe CMYK workflow" on page 408

Working with color profiles

About color profiles

Precise, consistent color management requires accurate ICC-compliant profiles of all of your color devices. For example, without an accurate scanner profile, a perfectly scanned image may appear incorrect in another program, simply due to any difference between the scanner and the program displaying the image. This misleading representation may cause you to make unnecessary, time-wasting, and potentially damaging "corrections" to an already satisfactory image. With an accurate profile, a program importing the image can correct for any device differences and display a scan's actual colors.

A color management system uses the following kinds of profiles:

Monitor profiles Describe how the monitor is currently reproducing color. This is the first profile you should create because viewing color accurately on your monitor allows for critical color decisions in the design process. If what you see on your monitor is not representative of the actual colors in your document, you will not be able to maintain color consistency.

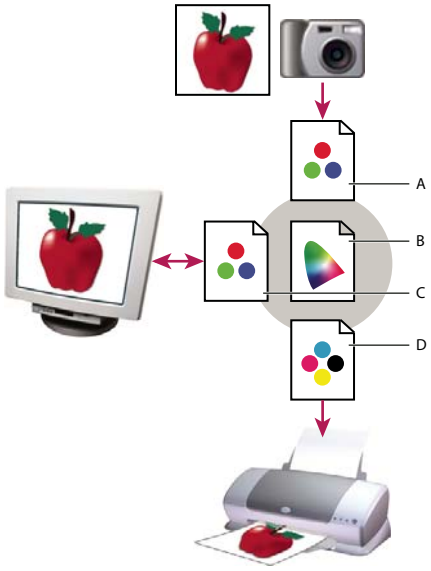
Input device profiles Describe what colors an input device is capable of capturing or scanning. If your digital camera offers a choice of profiles, Adobe recommends that you select Adobe RGB. Otherwise, use sRGB (which is the default for most cameras). Advanced users may also consider using different profiles for different light sources. For scanner profiles, some photographers create separate profiles for each type or brand of film scanned on a scanner.

Output device profiles Describe the color space of output devices like desktop printers or a printing press. The color management system uses output device profiles to properly map the colors in a document to the colors within the gamut of an output device's color space. The output profile should also take into consideration specific printing conditions, such as the type of paper and ink. For example, glossy paper is capable of displaying a different range of colors than matte paper.

Most printer drivers come with built-in color profiles. It's a good idea to try these profiles before you invest in custom profiles.

Document profiles Define the specific RGB or CMYK color space of a document. By assigning, or *tagging*, a document with a profile, the application provides a definition of actual color appearances in the document. For example, R=127, G=12, B=107 is just a set of numbers that different devices will display differently. But when tagged with the Adobe RGB color space, these numbers specify an actual color or wavelength of light–in this case, a specific color of purple.

When color management is on, Adobe applications automatically assign new documents a profile based on Working Space options in the Color Settings dialog box. Documents without assigned profiles are known as *untagged* and contain only raw color numbers. When working with untagged documents, Adobe applications use the current working space profile to display and edit colors.



Managing color with profiles
A. *Profiles describe the color spaces of the input device and the document.* ***B.*** *Using the profiles' descriptions, the color management system identifies the document's actual colors.* ***C.*** *The monitor's profile tells the color management system how to translate the document's numeric values to the monitor's color space.* ***D.*** *Using the output device's profile, the color management system translates the document's numeric values to the color values of the output device so the correct appearance of colors is printed.*

See also

"Calibrate and profile your monitor" on page 416

"Letting the printer determine colors when printing" on page 412

"Obtaining custom profiles for desktop printers" on page 413

"About color working spaces" on page 419

About monitor calibration and characterization

Profiling software can both calibrate and characterize your monitor. *Calibrating* your monitor brings it into compliance with a predefined standard—for example, adjusting your monitor so that it displays color using the graphics arts standard white point color temperature of 5000° K (Kelvin). *Characterizing* your monitor simply creates a profile that describes how the monitor is currently reproducing color.

Monitor calibration involves adjusting the following video settings:

Brightness and contrast The overall level and range, respectively, of display intensity. These parameters work just as they do on a television. A monitor calibration utility helps you set an optimum brightness and contrast range for calibration.

Gamma The brightness of the midtone values. The values produced by a monitor from black to white are nonlinear—if you graph the values, they form a curve, not a straight line. Gamma defines the value of that curve halfway between black and white.

Phosphors The substances that CRT monitors use to emit light. Different phosphors have different color characteristics.

White point The color and intensity of the brightest white the monitor can reproduce.

Calibrate and profile your monitor

When you calibrate your monitor, you are adjusting it so it conforms to a known specification. Once your monitor is calibrated, the profiling utility lets you save a color profile. The profile describes the color behavior of the monitor—what colors can or cannot be displayed on the monitor and how the numeric color values in an image must be converted so that colors are displayed accurately.

1 Make sure your monitor has been turned on for at least a half hour. This gives it sufficient time to warm up and produce more consistent output.

2 Make sure your monitor is displaying thousands of colors or more. Ideally, make sure it is displaying millions of colors or 24-bit or higher.

3 Remove colorful background patterns on your monitor desktop and set your desktop to display neutral grays. Busy patterns or bright colors surrounding a document interfere with accurate color perception.

4 Do one of the following to calibrate and profile your monitor:

- In Windows, install and use a monitor calibration utility.
- In Mac OS, use the Calibrate utility, located on the System Preferences/Displays/Color tab.
- For the best results, use third-party software and measuring devices. In general, using a measuring device such as a colorimeter along with software can create more accurate profiles because an instrument can measure the colors displayed on a monitor far more accurately than the human eye.

Note: *Monitor performance changes and declines over time; recalibrate and profile your monitor every month or so. If you find it difficult or impossible to calibrate your monitor to a standard, it may be too old and faded.*

Most profiling software automatically assigns the new profile as the default monitor profile. For instructions on how to manually assign the monitor profile, refer to the Help system for your operating system.

Install a color profile

Color profiles are often installed when a device is added to your system. The accuracy of these profiles (often called *generic profiles* or *canned profiles*) varies from manufacturer to manufacturer. You can also obtain device profiles from your service provider, download profiles from the web, or create *custom profiles* using professional profiling equipment.

- In Windows, right-click a profile and select Install Profile. Alternatively, copy the profiles into the WINDOWS\system32\spool\drivers\color folder.

- In Mac OS, copy profiles into the /Library/ColorSync/Profiles folder or the /Users/[*username*]/Library/ColorSync/Profiles folder.

After installing color profiles, be sure to restart Adobe applications.

See also

"Obtaining custom profiles for desktop printers" on page 413

Embed a color profile

To embed a color profile in a document you created in Illustrator, InDesign, or Photoshop, you must save or export the document in a format that supports ICC profiles.

1 Save or export the document in one of the following file formats: Adobe PDF, PSD (Photoshop), AI (Illustrator), INDD (InDesign), JPEG, Photoshop EPS, Large Document Format, or TIFF.

2 Select the option for embedding ICC profiles. The exact name and location of this option varies between applications. Search Adobe Help for additional instructions.

Embed a color profile (Acrobat)

You can embed a color profile in an object or an entire PDF. Acrobat attaches the appropriate profile, as specified in the Destination Space area of the Convert Colors dialog box, to the selected color space in the PDF. For more information, see the color conversion topics in Complete Acrobat Help.

Changing the color profile for a document

There are very few situations that require you to change the color profile for a document. This is because your application automatically assigns the color profile based on the settings you select in the Color Settings dialog box. The only times you should manually change a color profile are when preparing a document for a different output destination or correcting a policy behavior that you no longer want implemented in the document. Changing the profile is recommended for advanced users only.

You can change the color profile for a document in the following ways:

- Assign a new profile. The color numbers in the document remain the same, but the new profile may dramatically change the appearance of the colors as displayed on your monitor.
- Remove the profile so that the document is no longer color-managed.
- (Acrobat, Photoshop and InDesign) Convert the colors in the document to the color space of a different profile. The color numbers are shifted in an effort to preserve the original color appearances.

Assign or remove a color profile (Illustrator, Photoshop)

1 Choose Edit > Assign Profile.

2 Select an option, and click OK:

Don't Color Manage This Document Removes the existing profile from the document. Select this option only if you are sure that you do not want to color-manage the document. After you remove the profile from a document, the appearance of colors is defined by the application's working space profiles.

Working [color model: working space] Assigns the working space profile to the document.

Profile Lets you select a different profile. The application assigns the new profile to the document without converting colors to the profile space. This may dramatically change the appearance of the colors as displayed on your monitor.

See also

"Changing the color profile for a document" on page 417

Assign or remove a color profile (InDesign)

1 Choose Edit > Assign Profiles.

2 For RGB Profile and CMYK Profile, select one of the following:

Discard (Use Current Working Space) Removes the existing profile from the document. Select this option only if you are sure that you do not want to color-manage the document. After you remove the profile from a document, the appearance of colors is defined by the application's working space profiles, and you can no longer embed a profile in the document.

Assign Current Working Space [working space] Assigns the working space profile to the document.

Assign Profile Lets you select a different profile. The application assigns the new profile to the document without converting colors to the profile space. This may dramatically change the appearance of the colors as displayed on your monitor.

3 Choose a rendering intent for each type of graphic in your document. For each graphic type, you can choose one of the four standard intents, or the Use Color Settings Intent, which uses the rendering intent currently specified in the Color Settings dialog box. For more information on rendering intents, search in Help.

The graphic types include the following:

Solid Color Intent Sets the rendering intent for all vector art (solid areas of color) in InDesign native objects.

Default Image Intent Sets the default rendering intent for bitmap images placed in InDesign. You can still override this setting on an image-by-image basis.

After-Blending Intent Sets the rendering intent to the proofing or final color space for colors that result from transparency interactions on the page. Use this option when your document includes transparent objects.

4 To preview the effects of the new profile assignment in the document, select Preview, and then click OK.

See also

"Changing the color profile for a document" on page 417

"View or change profiles for imported bitmap images (InDesign)" on page 409

Convert document colors to another profile (Photoshop)

1 Choose Edit > Convert To Profile.

2 Under Destination Space, choose the color profile to which you want to convert the document's colors. The document will be converted to and tagged with this new profile.

3 Under Conversion Options, specify a color management engine, a rendering intent, and black point and dither options (if available). (See "Color conversion options" on page 422.)

4 To flatten all layers of the document onto a single layer upon conversion, select Flatten Image.

5 To preview the effects of the conversion in the document, select Preview.

See also

"Changing the color profile for a document" on page 417

Convert document colors to another profile

You convert colors in a PDF using the Convert Colors tool on the Print Production toolbar. For more information, see the color conversion topics in Complete Acrobat Help.

Color settings

Customize color settings

For most color-managed workflows, it is best to use a preset color setting that has been tested by Adobe Systems. Changing specific options is recommended only if you are knowledgeable about color management and very confident about the changes you make.

After you customize options, you can save them as a preset. Saving color settings ensures that you can reuse them and share them with other users or applications.

- To save color settings as a preset, click Save in the Color Settings dialog box. To ensure that the application displays the setting name in the Color Settings dialog box, save the file in the default location. If you save the file to a different location, you must load the file before you can select the setting.
- To load a color settings preset that's not saved in the standard location, click Load in the Color Settings dialog box, select the file you want to load, and click Open.

Note: *In Acrobat, you cannot save customized color settings. To share customized color settings with Acrobat, you must create the file in InDesign, Illustrator, or Photoshop, and then save it in the default Settings folder. It will then be available in the Color Management category of the Preferences dialog box. You can also add settings manually to the default Settings folder.*

About color working spaces

A *working space* is an intermediate color space used to define and edit color in Adobe applications. Each color model has a working space profile associated with it. You can choose working space profiles in the Color Settings dialog box.

A working space profile acts as the source profile for newly created documents that use the associated color model. For example, if Adobe RGB (1998) is the current RGB working space profile, each new RGB document that you create will use colors within the Adobe RGB (1998) gamut. Working spaces also determine the appearance of colors in untagged documents.

If you open a document embedded with a color profile that doesn't match the working space profile, the application uses a *color management policy* to determine how to handle the color data. In most cases, the default policy is to preserve the embedded profile.

See also

"About missing and mismatched color profiles" on page 420

"Color management policy options" on page 421

Working space options

To display working space options in Photoshop, Illustrator and InDesign, choose Edit > Color Settings. In Acrobat, select the Color Management category of the Preferences dialog box.



To view a description of any profile, select the profile and then position the pointer over the profile name. The description appears at the bottom of the dialog box.

RGB Determines the RGB color space of the application. In general, it's best to choose Adobe RGB or sRGB, rather than the profile for a specific device (such as a monitor profile).

sRGB is recommended when you prepare images for the web, because it defines the color space of the standard monitor used to view images on the web. sRGB is also a good choice when you work with images from consumer-level digital cameras, because most of these cameras use sRGB as their default color space.

Adobe RGB is recommended when you prepare documents for print, because Adobe RGB's gamut includes some printable colors (cyans and blues in particular) that can't be defined using sRGB. Adobe RGB is also a good choice when working with images from professional-level digital cameras, because most of these cameras use Adobe RGB as their default color space.

CMYK Determines the CMYK color space of the application. All CMYK working spaces are device-dependent, meaning that they are based on actual ink and paper combinations. The CMYK working spaces Adobe supplies are based on standard commercial print conditions.

Gray (Photoshop) or Grayscale (Acrobat) Determines the grayscale color space of the application.

Spot (Photoshop) Specifies the dot gain to use when displaying spot color channels and duotones.

Note: *In Acrobat, you can use the color space in an embedded output intent instead of a document color space for viewing and printing. Select Output Intent Overrides Working Spaces. For more information on output intents, see Complete Acrobat Help.*

Adobe applications ship with a standard set of working space profiles that have been recommended and tested by Adobe Systems for most color management workflows. By default, only these profiles appear in the working space menus. To display additional color profiles that you have installed on your system, select Advanced Mode (Illustrator and InDesign) or More Options (Photoshop). A color profile must be bi-directional (that is, contain specifications for translating both into and out of color spaces) in order to appear in the working space menus.

Note: *In Photoshop, you can create custom working space profiles. However, Adobe recommends that you use a standard working space profile rather than create a custom profile. For more information, see the Photoshop support knowledgebase at www.adobe.com/support/products/photoshop.html.*

About missing and mismatched color profiles

For a newly created document, the color workflow usually operates seamlessly: Unless specified otherwise, the document uses the working space profile associated with its color mode for creating and editing colors.

However, some existing documents may not use the working space profile that you have specified, and some existing documents may not be color-managed. It is common to encounter the following exceptions to your color-managed workflow:

- You might open a document or import color data (for example, by copying and pasting or dragging and dropping) from a document that is not tagged with a profile. This is often the case when you open a document created in an application that either does not support color management or has color management turned off.
- You might open a document or import color data from a document that is tagged with a profile different from the current working space. This may be the case when you open a document that was created using different color management settings, or scanned and tagged with a scanner profile.

In either case, the application uses a color management policy to decide how to handle the color data in the document.

If the profile is missing or does not match the working space, the application may display a warning message, depending on options you set in the Color Settings dialog box. Profile warnings are turned off by default, but you can turn them on to ensure the appropriate color management of documents on a case-by-case basis. The warning messages vary between applications, but in general you have the following options:

- (Recommended) Leave the document or imported color data as it is. For example, you can choose to use the embedded profile (if one exists), leave the document without a color profile (if one doesn't exist), or preserve the numbers in pasted color data.
- Adjust the document or imported color data. For example, when opening a document with a missing color profile, you can choose to assign the current working space profile or a different profile. When opening a document with a mismatched color profile, you can choose to discard the profile or convert the colors to the current working space. When importing color data, you can choose to convert the colors to the current working space in order to preserve their appearance.

Color management policy options

A *color management policy* determines how the application handles color data when you open a document or import an image. You can choose different policies for RGB and CMYK images, and you can specify when you want warning messages to appear. To display color management policy options, choose Edit > Color Settings.

To view a description of a policy, select the policy and then position the pointer over the policy name. The description appears at the bottom of the dialog box.

RGB, CMYK, And Gray Specifies a policy to follow when bringing colors into the current working space (either by opening files or importing images into the current document). (The Grayscale option is available for Photoshop only.) Choose from the following options:

- **Preserve Embedded Profiles** Always preserves embedded color profiles when opening files. This is the recommended option for most workflows because it provides consistent color management. One exception is if you're concerned about preserving CMYK numbers, in which case you should select Preserve Numbers (Ignore Linked Profiles) instead.

- **Convert To Working Space** Converts colors to the current working space profile when opening files and importing images. Select this option if you want to force all colors to use a single profile (the current working space profile).

- **Preserve Numbers (Ignore Linked Profiles)** This option is available in InDesign and Illustrator for CMYK. Preserves color numbers when opening files and importing images, but still allows you to use color management to

view colors accurately in Adobe applications. Select this option if you want to use a safe CMYK workflow. In InDesign, you can override this policy on a per-object basis by choosing Object > Image Color Settings.

• **Off** Ignores embedded color profiles when opening files and importing images, and does not assign the working space profile to new documents. Select this option if you want to discard any color metadata provided by the original document creator.

Profile Mismatches: Ask When Opening Displays a message whenever you open a document tagged with a profile other than the current working space. You will be given the option to override the policy's default behavior. Select this option if you want to ensure the appropriate color management of documents on a case-by-case basis.

Profile Mismatches: Ask When Pasting Displays a message whenever color profile mismatches occur as colors are imported into a document through pasting or dragging-and-dropping. You will be given the option to override the policy's default behavior. Select this option if you want to ensure the appropriate color management of pasted colors on a case-by-case basis.

Missing Profiles: Ask When Opening Displays a message whenever you open an untagged document. You will be given the option to override the policy's default behavior. Select this option if you want to ensure the appropriate color management of documents on a case-by-case basis.

Color conversion options

Color conversion options let you control how the application handles the colors in a document as it moves from one color space to another. Changing these options is recommended only if you are knowledgeable about color management and very confident about the changes you make. To display conversion options, choose Edit > Color Settings, and select Advanced Mode (Illustrator and InDesign) or More Options (Photoshop). In Acrobat, select the Color Management category of the Preferences dialog box.

Engine Specifies the Color Management Module (CMM) used to map the gamut of one color space to the gamut of another. For most users, the default Adobe (ACE) engine fulfills all conversion needs.

To view a description of an engine or intent option, select the option and then position the pointer over the option name. The description appears at the bottom of the dialog box.

Intent (Photoshop, Illustrator, InDesign) Specifies the rendering intent used to translate one color space to another. Differences between rendering intents are apparent only when you print a document or convert it to a different working space.

Use Black Point Compensation Ensures that the shadow detail in the image is preserved by simulating the full dynamic range of the output device. Select this option if you plan to use black point compensation when printing (which is recommended in most situations).

Use Dither (Photoshop) Controls whether to dither colors when converting 8-bit-per-channel images between color spaces. When the Use Dither option is selected, Photoshop mixes colors in the destination color space to simulate a missing color that existed in the source space. Although dithering helps to reduce the blocky or banded appearance of an image, it may also result in larger file sizes when images are compressed for web use.

About rendering intents

A *rendering intent* determines how a color management system handles color conversion from one color space to another. Different rendering intents use different rules to determine how the source colors are adjusted; for example, colors that fall inside the destination gamut may remain unchanged, or they may be adjusted to preserve the original range of visual relationships when translated to a smaller destination gamut. The result of choosing a rendering intent depends on the graphical content of documents and on the profiles used to specify color spaces. Some profiles produce identical results for different rendering intents.

In general, it is best to use the default rendering intent for the selected color setting, which has been tested by Adobe Systems to meet industry standards. For example, if you choose a color setting for North America or Europe, the default rendering intent is Relative Colorimetric. If you choose a color setting for Japan, the default rendering intent is Perceptual.

You can select a rendering intent when you set color conversion options for the color management system, soft-proof colors, and print artwork:

Perceptual Aims to preserve the visual relationship between colors so it's perceived as natural to the human eye, even though the color values themselves may change. This intent is suitable for photographic images with lots of out-of-gamut colors. This is the standard rendering intent for the Japanese printing industry.

Saturation Tries to produce vivid colors in an image at the expense of color accuracy. This rendering intent is suitable for business graphics like graphs or charts, where bright saturated colors are more important than the exact relationship between colors.

Relative Colorimetric Compares the extreme highlight of the source color space to that of the destination color space and shifts all colors accordingly. Out-of-gamut colors are shifted to the closest reproducible color in the destination color space. Relative Colorimetric preserves more of the original colors in an image than Perceptual. This is the standard rendering intent for printing in North America and Europe.

Absolute Colorimetric Leaves colors that fall inside the destination gamut unchanged. Out-of-gamut colors are clipped. No scaling of colors to destination white point is performed. This intent aims to maintain color accuracy at the expense of preserving relationships between colors and is suitable for proofing to simulate the output of a particular device. This intent is particularly useful for previewing how paper color affects printed colors.

Advanced controls in Photoshop

In Photoshop you display advanced controls for managing color by choosing Edit > Color Settings and selecting More Options.

Desaturate Monitor Colors By Determines whether to desaturate colors by the specified amount when displayed on the monitor. When selected, this option can aid in visualizing the full range of color spaces with gamuts larger than that of the monitor. However, this causes a mismatch between the monitor display and the output. When the option is deselected, distinct colors in the image may display as a single color.

Blend RGB Colors Using Gamma Controls how RGB colors blend together to produce composite data (for example, when you blend or paint layers using Normal mode). When the option is selected, RGB colors are blended in the color space corresponding to the specified gamma. A gamma of 1.00 is considered "colorimetrically correct" and should result in the fewest edge artifacts. When the option is deselected, RGB colors are blended directly in the document's color space.

Note: *When you select Blend RGB Colors Using Gamma, layered documents will look different when displayed in other applications than they do in Photoshop.*

Chapter 15: Printing

Whether you send a quick draft to an inkjet or laser printer, provide a multicolored document to an outside service provider, or print a complex technical document with custom page sizes, you can set options in the Print dialog box to ensure that the finished document appears as intended.

Quickstart

The following topics provide overview steps to some more complex printing tasks.

Print a booklet

When you create a booklet, pages are arranged on sheets of paper so that they are in the correct order when the paper is collated, folded, and stapled.

Note: *To print booklets, the printer must support duplex printing (printing on both sides of the paper).*

1. Choose File > Print and select the printer.
2. Set Print Range to All.
3. Choose Booklet Printing from the Page Scaling menu.
4. Select additional page handling options as desired.

See also

"About booklets" on page 429

Preview color separations

You can preview separation plates and ink coverage to ensure that a document meets your requirements.

1. Choose Advanced > Print Production > Output Preview.
2. Choose Separations from the Preview menu, and do one of the following:

- To view or hide a separation, select or deselect it in the Separations list.
- To check ink coverage, move the pointer over the document. Ink coverage percentages appear next to each ink name.

See also

"Preview color separations" on page 456

Print color separations

You can create separations on the system using Acrobat and the printer driver (*host-based separations*) or on the output device's RIP (*in-RIP separations*).

Note: *You must use a PostScript printer to print color separations.*

1. Choose File > Print. Choose the output device, and then click Advanced.

2 Select Output on the left, and then choose Separations or In-RIP Separations from the Color menu.

3 Select a color profile and specify other print options as desired.

See also

"Print color separations" on page 441

Basic printing tasks

Print a PDF

If the desired printing option is in the Print dialog box, set it there rather than through the printer driver.

1 Make sure that you've installed the correct printer driver and PPD file for your printer. Printing results are generally more predictable with the correct PPD.

2 Choose File > Print Setup (Windows) or File > Page Setup (Mac OS) to choose a paper size, page orientation, and other general printing options. The options vary with different printers and drivers. See your printer driver documentation for details.

3 To print comments, such as sticky notes, in the Preferences dialog box, choose Commenting and select Print Notes And Pop-ups.

Note: *To open Preferences in Windows, choose Edit > Preferences. In Mac OS, choose Acrobat > Preferences.*

4 Click the Print button , or choose File > Print.

5 Choose a printer from the menu at the top of the Print dialog box.

6 (Mac OS) Choose an option from the Presets pop-up menu.

7 In Windows, click Properties to set any additional options available with the printer driver. In Mac OS, set printer driver options in the Print Center.

8 To print comments or forms, select an option from the Comments And Forms pop-up menu.

9 Indicate which pages you want to print, and then click OK.

Print over the Internet

You can print open PDFs to a FedEx Kinkos office in the United States.

Note: *This feature is only available in the United States.*

1 Save the document, and then choose File > Send To FedEx Kinkos.

2 Click OK to upload the document to the FedEx Kinkos print services website. You will then be guided through placing your print order.

Options in the Print dialog box

Most of the options in the Acrobat Print dialog box are the same for other applications.

Comments And Forms Specifies which visible content prints.

- **Document** Prints the document contents and form fields.

• **Document And Markups** Prints document contents, form fields, and comments.

• **Document And Stamps** Prints the document, form fields, and stamps, but no other markups, such as note comments and pencil lines.

• **Form Fields Only** Prints interactive form fields but doesn't print document contents.

Current View/Selected Graphic Prints the page area (including text, comments, and so on) that is visible in the current view. The option name changes depending on whether you have no pages selected (Current View), a page or pages selected (Selected Pages), or an area on a page selected using the Snapshot tool (Selected Graphic).

Current Page Prints the page that is visible in the current view.

Pages Specifies the range of pages to print in the open PDF. Separate numbers in a range by using a hyphen, and separate multiple pages or ranges by using commas or spaces. If the Use Logical Page Numbers option is selected in Page Display Preferences, you can enter numbers that match the numbering printed on the pages using roman numerals or actual page numbers. For example, if the first page of a document is numbered iii, you can enter iii or 1 to print that page. Selecting Odd Pages Only or Even Pages Only affects which pages in a range print. For example, in a range that includes 2, 7–10 with Even Pages Only selected, only pages 2, 8, and 10 will print.



To print from a specific page to the end of the document, enter the page with a hyphen. For example, "11-" prints page 11 to the last page of the document.

Subset Choose All Pages In Range, or choose Odd Pages Only or Even Pages Only to print only those pages within the specified range.

Reverse Pages Prints pages in reverse order. If page ranges are entered, the pages print opposite of the order in which they were entered. For example, if the Pages box shows 3–5, 7–10, selecting Reverse Pages prints pages 10–7, and then 5–3.

Page Scaling Reduces, enlarges, or divides pages when printing.

• **None** Prints the upper left or center of a page (if auto-rotated and centered) without scaling. Pages or selections that don't fit on the paper are cropped.

• **Fit To Printable Area** Reduces or enlarges each page to fit the printable area of the currently selected paper size. For PostScript® printers, the PPD determines the printable area of the paper.

• **Shrink To Printable Area** Shrinks large pages to fit the currently selected paper size but doesn't enlarge small pages. If an area is selected and is larger than the printable area of the currently selected paper, it's scaled to fit the printable area.

• **Tile Large Pages** Applies tiling to pages that are larger than the selected paper size at the specified scale. These pages are mapped to multiple sheets of paper. If this option is selected, you can also specify settings for Tile Scale, Overlap, Cut Marks, and Labels.

• **Tile All Pages** Applies tiling to all pages, regardless of size. However, only the pages that are larger than the selected paper size at the specified scale are mapped to multiple sheets of paper. If this option is selected, you can also specify settings for Tile Scale, Overlap, Cut Marks, and Labels.

• **Multiple Pages Per Sheet** Enables N-up printing, where multiple pages print on the same sheet of paper. If this option is selected, you can also specify settings for Pages Per Sheet, Page Order, Print Page Border, and Auto-Rotate Pages.

Note: *N-up printing in Acrobat is independent of the N-up printing features of printer drivers. The Acrobat print settings don't reflect the N-up settings of the printer drivers. Select N-up printing either in Acrobat or in the printer driver, but not both.*

• **Booklet Printing** Prints multiple pages on the same sheet of paper in the order required to read correctly when folded. The printer must support *duplex printing* (printing on both sides of the sheet). Acrobat automatically enables duplex printing, if available, for booklet printing.

Pages Per Sheet Prints a predefined number of pages, or a custom number (up to 99), horizontally and vertically during N-up printing. If you select a predefined number from the menu, Acrobatautomatically selects the best paper orientation.

Page Order Defines how the pages are ordered on paper during N-up printing. Horizontal places pages from left to right, top to bottom. Horizontal Reversed places pages from right to left, top to bottom. Vertical places pages top to bottom, left to right. Vertical Reversed places pages top to bottom, right to left. Both reversed options are suitable for Asian-language documents.

Print Page Border Draws the crop box (the page boundary of PDF pages) during N-up printing.

Auto-Rotate Pages Adjusts the PDF's orientation to match the orientation specified in the printer properties during N-up printing.

Note: *The Shrink To Printable Area option is always active for N-up printing. Therefore, the pages are always shrunk to fit the available imaging area regardless of how the Auto-Rotate And Center option is set.*

Choose Paper Source By PDF Page Size (Windows) Uses the PDF page size to determine the output tray rather than the page setup option. This option is useful for printing PDFs that contain multiple page sizes on printers that have different-sized output trays.

Print To File (Windows) Creates a device-dependent PostScript file of the document. The resulting file contains code for enabling and controlling specific device features, making it less compatible with devices other than the target device. For better results when creating PostScript files, use the Save As PostScript command.

Note: *You don't need to have a PostScript printer to create a PostScript file.*

Print Color As Black (Windows) Forces all nonwhite color to print as black. This option is useful for printing engineering drawings that have lightly colored lines.

Printing Tips If you're connected to the Internet, this option connects to the Adobe website for information on how to troubleshoot printing problems.

Advanced Opens one or more panels for setting additional printing options.

Summarize Comments Creates a separate, printable PDF of the comments in a document. This option is unavailable when you print from a web browser or print multiple documents in PDF packages. See "Print a comment summary" on page 184.

See also

"Downloading Asian fonts to a printer" on page 435

"Create print presets" on page 428

Print a portion of a page

1 Choose Tools > Select & Zoom > Snapshot Tool.

2 Drag around the area you want to print.

Acrobat copies the selected area to the clipboard.

3 Choose File > Print to print the selection.

Print layers

Normally, when you print a PDF that contains layers, just the content that is visible on-screen is printed. However, the creator of a layered PDF can specify that some layered content, such as watermarks or confidential information, must (or must not) print, regardless of its visibility on-screen. If the document is designed to print differently from how it currently appears on-screen, a message may appear in the Print dialog box. The Preview image in the Print dialog box always shows the page as it will print.

Note: *To work with layers in Acrobat, convert the source document to PDF using a preset that preserves layers, such as Acrobat 6 (PDF 1.5) or later.*

View how layers print

1 Click the Layers icon in the navigation panel.

2 Choose Apply Print Overrides from the Options menu.

Note: *Depending on the visibility settings specified when the PDF was created, Apply Print Overrides may be unavailable in the Options menu.*

Change print settings for a layer

1 Click the Layers icon in the navigation panel.

2 Expand the layers area, select a layer, and then select Layer Properties from the Options menu.

3 In the Layer Properties dialog box, choose one of the following from the Print pop-up menu:

Always Prints Forces the layer to print.

Never Prints Forces the layer not to print.

Prints When Visible Matches printed output to on-screen visibility.

Create print presets

A PDF can contain a set of *print presets*, a group of document-specific values that is used to set basic print options. By creating a print preset for a document, you can avoid manually setting certain options in the Print dialog box each time you print the document. It's best to define print settings for a PDF at the time that you create it, but print presets provide a means to add basic print settings to a PDF at any time.

1 Choose File > Properties, and click the Advanced tab.

2 In the Print Dialog Presets section, set options and click OK.

The next time you open the Print dialog box, the values will be set to the print preset values. These settings are also used when you print individual documents in a PDF package.

Note: *To retain a print preset for a PDF, you must save the PDF after creating the print preset.*

Print Dialog Presets

Page Scaling Prepopulates the Page Scaling option in the Print dialog box with the option you choose:

- **Default** Uses the application default setting, which is Shrink To Printable Area.
- **None** Prevents automatic scaling to fit the printable area. This setting is useful for preserving the scale of page content in engineering documents, or for ensuring that documents print at a particular point size to be legal.

DuplexMode For best results, the selected printer should support duplex printing if you select a duplex option.

- **Simplex** Prints on one side of the paper.

- **Duplex Flip Long Edge** Prints on both sides of the paper; the paper flips along the long edge.
- **Duplex Flip Short Edge** Prints on both sides of the paper; the paper flips along the short edge.

Paper Source By Page Size Selects the option by the same name in the Print dialog box. Uses the PDF page size to determine the output tray rather than the page setup option. This option is useful for printing PDFs that contain multiple page sizes on printers that have different-sized output trays.

Print Page Range Prepopulates the Pages box in the Print Range section of the Print dialog box with the page ranges you enter here. This setting is useful in a workflow where documents include both instruction pages and legal pages. For example, if pages 1–2 represent instructions for filling out a form, and pages 3–5 represent the form, you can set up your print job to print multiple copies of only the form.

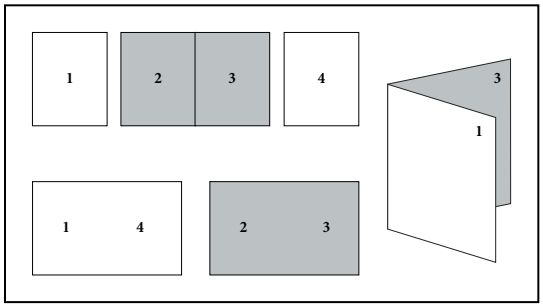
Number Of Copies Prepopulates the Copies box in the Print dialog box. Choose a number from 2 to 5, or choose Default to use the application default, which is one copy. This limitation prevents multiple unwanted copies from being printed.

Other ways to print PDFs

About booklets

Booklets are documents with multiple pages arranged on sheets of paper that, when folded, present the correct page order. You can create 2-up saddle-stitched booklets, where two side-by-side-pages, printed on both sides, are folded once and fastened along the fold. The first page prints on the same printed sheet as the last page, the second page on the same sheet as the second-to-last page, and so on. Each page is automatically centered on the sheet, and large pages are scaled (shrunk) to fit the printable area. When you collate, fold, and staple the double-sided pages, the result is a single book with correct pagination.

To print booklets, your printer must support either automatic or manual *duplex printing* (printing on both sides of the paper). Manual duplex printing requires two separate printing passes: one to print the front side, and another to print the back side. To find out whether your printer supports duplex printing, check the printer manual, contact the printer manufacturer, or click the Properties button in the Print dialog box and look for options that mention two-sided or duplex printing.



Pages arranged in PDF (top), pages arranged in booklet layout (bottom), and pages printed and folded into new booklet

Print a booklet

1 Choose File > Print and select the printer.

2 Choose Booklet Printing from the Page Scaling menu.

3 In the Print Range area, specify which pages to print:

- To print pages from front to back, select All.
- To divide a large booklet into smaller groupings, select Pages and specify a page range for the first grouping. Print each page range separately.
- To print certain pages on a different paper or paper stock, specify those pages using the Sheets From/To option. Click the Properties button and select the correct paper tray and any other options as necessary.

4 Choose additional page handling options. The Preview image changes as you specify options.

Booklet Subset Determines which sides of the paper print. Choose Both Sides to automatically print both sides of the paper (your printer must support automatic duplex printing). Choose Front Side Only to print all pages that appear on the front side of the paper. After these pages print, flip them, choose File > Print again, and choose Back Side Only. Depending on the printer model, you might have to turn and reorder the pages to print the back sides.

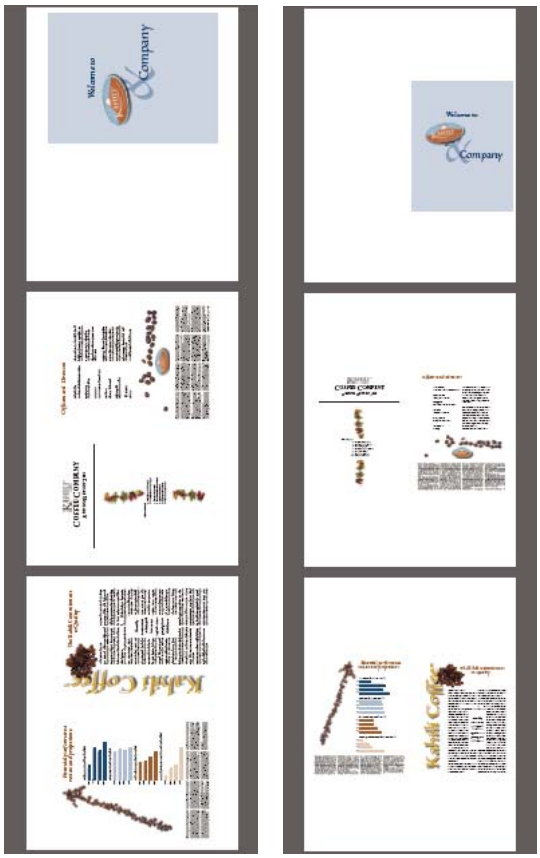


To prevent others in a shared printing environment from printing on your pages before you print the back side, consider printing the back side pages using a different paper tray.

Auto-Rotate Pages Automatically rotates each page for the best fit in the printable area.

Sheets From Specifies the first and last sheet to print. Acrobat determines which sheets must print to accommodate the print job. For example, if you have a 16-page document, then sheets 1 through 4 print.

Binding Determines the orientation for the binding. Choose Left for text read left-to-right; choose Left (Tall) for paper folded on the long side, where the printable area is long and narrow. Choose Right for text read right-to-left or for Asian-style vertical reading; choose Right (Tall) for paper folded on the long side.



Compare Right binding with Right (Tall).

Print documents in a PDF package

A PDF package contains multiple documents wrapped in one PDF. You can print the documents individually or together.

1 Open the PDF package. You can select the cover sheet and print it on a different printer or paper stock.

2 Choose File > Print, and then choose one of the following commands:

Print Current Document Prints the open PDF.

Print All Documents Prints all the PDFs in the package.

Print Selected Documents Prints some of the PDFs in the package. (This option is available only when multiple files are selected in the list of component documents.)

3 Choose applicable printing options, and click OK.

Documents are printed in the order they appear in the package.

Note: *You must use the native application to print any component file that is not a PDF. When a non-PDF component is selected in the PDF package component list, you can click the Open button that appears in the Acrobat document pane to open the file's native application, if it is installed on your computer.*

See also

"About PDF packages" on page 119

Print from the Bookmarks tab

You can print the pages associated with bookmarks directly from the Bookmarks tab. Bookmarks appear in a hierarchy, with parent bookmarks and child (dependent) bookmarks. If you print a parent bookmark, all page content associated with child-level bookmarks also print.

Not all bookmarks display page content, and therefore cannot be printed. For example, some bookmarks open a file or play a sound. If you select a mix of printable and nonprintable bookmarks, the nonprintable bookmarks are ignored.

Note: *Bookmarks made from tagged content always display page content because the tagged content represents printable elements in the document structure, such as headings and figures.*

1 Open a PDF with bookmarks. If necessary, choose View > Navigation Panels > Bookmarks so the bookmarks appear in the navigation pane.

2 Select one or more bookmarks, and then right-click/Control-click the selection.

3 Choose Print Page(s) from the menu.

See also

"About bookmarks" on page 327

"Add tagged bookmarks" on page 330

Printing custom sizes

Print an oversized document

Although you can create a PDF file as large as 15,000,000 inches (38,100,000 cm) in either direction, most desktop printers cannot print such large pages. To print an oversized document on your desktop printer, you can print each page in pieces, called tiles, and then trim and assemble those pieces.

You can also increase the scale of a standard-sized document and print it on multiple pages.

1 Choose File > Print.

2 From the Page Scaling menu, choose Tile All Pages if all pages of the document are oversized. If some of the pages are standard-sized, choose Tile Large Pages.

3 (Optional) Set any of these options, referring to the Preview image to check the output results:

Tile Scale Adjusts the scaling. The scaling affects how the sections of the PDF page map to the physical sheet.

Overlap Specifies the minimum amount of duplicated information you want printed on each tile for ease in assembly. The Overlap option uses the unit of measure specified for the document. The value should be greater than the minimum nonprinting margins for the printer. You can specify up to half the size of the shortest side of the document page to overlap. For example, tiles for a page that measures 11-by-17 inches (279.4mm-by-431.8mm) can overlap up to 5.5 inches (139.7mm).

Labels Includes the PDF name, date of printing, and tile coordinate on every sheet. For example, Page 1 (1,1) means row 1, column 1 of the first page. Tile coordinates are used for reassembling the tiles.

Cut Marks Prints marks on each corner of a tiled page for ease of assembly. Use this option in conjunction with the Overlap option. When you specify an overlapping edge and then superimpose those edges, you can use the cut marks to line up the tiles.

Scale a document for printing

To print an oversized PDF on paper that has smaller dimensions, you can scale the document's width and height to fit.

1 Choose File > Print.

2 From the Page Scaling menu, choose Fit To Printable Area or Shrink To Printable Area.

Advanced print settings

About PPD files

A *PPD file* (PostScript Printer Description file) customizes the behavior of the driver for your specific PostScript printer. It contains information about the output device, including printer-resident fonts, available media sizes and orientation, optimized screen frequencies, screen angles, resolution, and color output capabilities. It's important to set up the correct PPD before you print. Selecting the PPD that corresponds to your PostScript printer or imagesetter populates the Print dialog box with the available settings for the output device. You can switch to a different one to suit your needs. Applications use the information in the PPD file to determine which PostScript information to send to the printer when printing a document.

For best printing results, Adobe recommends that you obtain the latest version of the PPD file for your output device from the manufacturer. Many print service providers and commercial printers have PPDs for the imagesetters they use. Be sure to store PPDs in the location specified by the operating system. For details, consult the documentation for your operating system.

Select a PPD file

The steps for selecting a PPD file are different for each platform.

Select a PPD file in Windows

1 Depending on your version of Windows, do one of the following to open the Add Printer wizard:

- In Windows 2000, choose Start > Settings > Printers > Add Printer.
- In Windows XP, choose Start, open the Printers And Faxes control panel, and click Add A Printer.

2 Follow the instructions to add a printer and specify a PPD file.

Select a PPD file in Mac OS

1 Open the area where you add printers.

2 Click Add in the Printer List window.

3 From the top menu, choose a connection method.

4 Select a printer, or enter the printer's IP address.

5 From the bottom menu, select a printer model.

6 In the list that appears, select a PPD file, and then click Add.

About advanced print settings

If normal print settings don't produce the results you expect, you may need to specify options in the Advanced Print Setup dialog box. For example, if your printed output doesn't match the document's on-screen appearance, you may need to try printing the document as an image. Or, if a PDF uses fonts that aren't embedded, you must download the fonts to the printer when you print the document.

Other advanced printing options let you add printer marks to your printed output and choose how to handle color.

Set advanced print options

Print settings are preserved as long as the application is open. To use the settings again, you can save them in a file.

1 In the Print dialog box, click Advanced.

2 If a custom printer settings file exists with the settings you want, choose it from the Settings menu. Otherwise, choose Acrobat Default.



To learn more about an option, select it. A description of it appears at the bottom of the dialog box.

3 If normal printing doesn't produce the desired results, select Print As Image and choose a resolution from the drop-down list.

4 Select any of the panels on the left side of the Advanced Print Setup dialog box, and set options for either composite or separations output.

- Set color and other output conditions. See "Output options" on page 435.
- Set options for printer marks. See "Include marks and bleeds" on page 438.
- Set options for PostScript printers. See "PostScript options" on page 434.

Note: *Acrobat sets the PostScript level automatically, based on the selected printer.*

5 To save the settings, click Save As, specify a filename, and click OK. The print settings are saved as an .spf file.

6 Click OK to accept the settings and return to the Print dialog box.

PostScript options

Use the PostScript Options panel of the Advanced Print Setup dialog box to set options for a particular PostScript printer, such as how to handle nonresident printer fonts and whether to download Asian fonts. In addition, if a PDF contains device-dependent settings, such as halftones and transfer functions, these settings can be sent in the PostScript output to override the default settings in the printer. To use these options, you must be connected to a PostScript printer or have a PostScript printer driver installed with a PPD file selected.

Print Method Specifies the level of PostScript to generate for the pages. Choose the level of PostScript appropriate for your printer.

Font And Resource Policy Specifies how fonts and resources in the document are sent to a printer when those fonts and resources aren't present on the printer.

- **Send At Start** Downloads all fonts and resources at the start of the print job. The fonts and resources remain on the printer until the job has finished printing. This option is the fastest but uses the most printer memory.

• **Send By Range** Downloads fonts and resources before printing the first page that uses them, and then discards them when they are no longer needed. This option uses less printer memory. However, if a PostScript processor reorders the pages later in the workflow, it might not reorder the font downloading correctly, resulting in missing fonts. This option may not work with some printers.

• **Send For Each Page** Downloads all fonts and resources for a given page before the page prints, and then discards the fonts when the page has finished printing. This option uses the least printer memory.

Download Asian Fonts Prints documents with Asian fonts that aren't installed on the printer or embedded in the PDF. The Asian fonts must be present on the system.

Emit CIDFontType2 As CIDFontType2 (PS Version 2015 And Greater) Preserves hinting information in the original font when printing. If unselected, CIDFontType2 fonts are converted to CIDFontType0 fonts, which are compatible with a wider range of printers. This option is available for PostScript 3 and PostScript Level 2 (PostScript version 2015 and later) output devices.

Print As Image Prints pages as bitmap images. Select this option if normal printing doesn't produce the desired results, and specify a resolution. This option is available only for PostScript printers.

Downloading Asian fonts to a printer

Select the Download Asian Fonts option in the Advanced Print Setup dialog box if you want to print a PDF with Asian fonts that are not installed on the printer or embedded in the document. (Embedded fonts are downloaded whether or not this option is selected.) You can use this option with a PostScript Level 2 or higher printer. To make Asian fonts available for downloading to a printer, be sure you have downloaded the fonts to your computer using the Custom or Complete installation option during installation of Acrobat.

If Download Asian Fonts is not selected, the PDF prints correctly only if the referenced fonts are installed on the printer. If the printer has similar fonts, the printer substitutes those. If there are no suitable fonts on the printer, Courier is used for the text.

If Download Asian Fonts does not produce the results you want, print the PDF as a bitmap image. Printing a document as an image may take longer than using a substituted printer font.

Note: *Some fonts cannot be downloaded to a printer, either because the font is a bitmap or because font embedding is restricted in that document. In these cases, a substitute font is used for printing, and the printed output may not match the screen display.*

Output options

Use the Output panel of the Advanced Print Setup dialog box to set output options.

Color Presents composite and separations options. Other options become available in the Output panel depending on your selection in this menu.

Color Profile Determines the profile used for handling colors during printing.

• **Printer/PostScript Color Management** Sends the document's color data along with the document profile directly to the PostScript printer and lets the printer convert the document to the printer color space. The exact results of the color conversion can vary among printers. To use PostScript color management, you must have a printer that uses PostScript Level 2 or later; it's not necessary to install an ICC profile for the printer on your system.

• **Same as Source (No Color Management)** Discards all color management information and sends device color to the printer, whether or not the document contains color management information.

Apply Output Preview Settings Simulates the print space defined by the device identified in the Simulation Profile menu of the Output Preview dialog box (choose Advanced > Print Production > Output Preview). This option allows you to simulate the appearance of one device on another.

Simulate Overprinting Simulates the effects of overprinting spot inks in composite output and converts spot colors to process colors for printing; the document itself is unchanged. This option is useful for printing devices that don't support overprinting and is available only if you choose Composite from the Color menu. If you intend to use a file for separations on a RIP (raster image processor) or for final output, don't select this option.

Important: *When printing to a printer that supports overprinting, make sure that this option is unselected, so the printer's native overprinting capabilities are used.*

Transparency Flattener Preset Flattens transparent objects according to the preset you choose.

Use Maximum Available JPEG2000 Image Resolution Controls how resolution progression information, if present, is used when generating PostScript. When selected, the maximum resolution data contained in the image is used. When unselected, the resolution data is consistent with the resolution settings on the Transparency Flattening panel.

Ink Manager Modifies the way inks are treated while the current PDF is open.

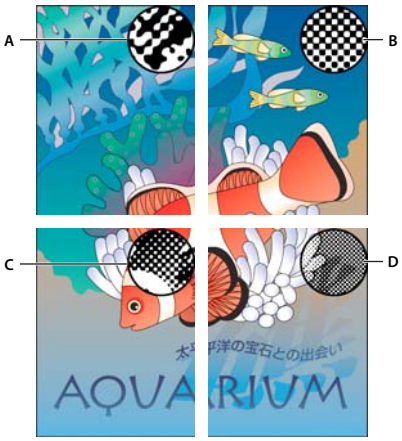
See also

"Ink Manager overview" on page 461

About halftone screen frequency

In commercial printing, continuous tone is simulated by dots (called *halftone dots*) printed in rows (called *lines* or *line screens*). Lines are printed at different angles to make the rows less noticeable. The Screening menu in the Output section of the Print dialog box displays the recommended sets of line screens in lines per inch (lpi), and resolution in dots per inch (dpi), based on the currently selected PPD. As you select inks in the ink list, the values in the Frequency and Angle boxes change, showing you the halftone screen frequency and angle for that ink.

A high line-screen ruling (for example, 150 lpi) spaces the dots closely together to create a finely rendered image on the press; a low line-screen ruling (60 lpi to 85 lpi) spaces the dots farther apart to create a coarser image. The size of the dots is also determined by the line screen. A high line-screen ruling uses small dots; a low line-screen ruling uses large dots. The most important factor in choosing a line-screen ruling is the type of printing press your job will use. Ask your service provider how fine a line screen its press can hold, and make your choices accordingly.



Line screens
A. *65 lpi: Coarse screen for printing newsletters and grocery coupons* ***B.*** *85 lpi: Average screen for printing newspapers* ***C.*** *133 lpi: High-quality screen for printing four-color magazines* ***D.*** *177 lpi: Very fine screen for printing annual reports and images in art books*

The PPD files for high-resolution imagesetters offer a wide range of possible screen frequencies, paired with various imagesetter resolutions. The PPD files for low-resolution printers typically have only a few choices for line screens, usually coarser screens of between 53 lpi and 85 lpi. The coarser screens, however, give optimum results on low-resolution printers. Using a finer screen of 100 lpi, for example, actually decreases the quality of your image when you use a low-resolution printer for final output.

Specify halftone screen frequency

❖ In the Output panel of the Advanced Print Setup dialog box, do one of the following:

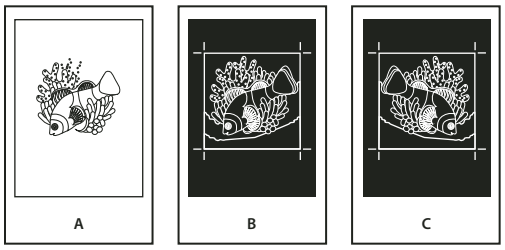
- To select one of the preset screen frequencies and printer resolution combinations, choose an option from the Screening menu.
- To specify a custom halftone screen frequency, in the ink list, select the plate to be customized, and then enter the lpi value in the Frequency box and a screen angle value in the Angle box.

Note: *Before creating your own halftone screens, check with your print service provider for the preferred frequencies and angles. Also, be aware that some output devices override the default frequencies and angles.*

About emulsion and image exposure

Depending on the type of printing press used and how information is transferred from the film to the printing plates, you may need to give your service provider film negatives or positives, with emulsion side up or down. *Emulsion* refers to the photosensitive layer on a piece of film or paper. Typically, print service providers require negative film in the United States and positive film in Europe and Japan. Check with your service provider to determine which emulsion direction they prefer.

To tell whether you are looking at the emulsion side or the nonemulsion side (also referred to as the *base*), examine the final film under a good light. One side appears shinier than the other. The dull side is the emulsion side; the shiny side is the base.



Emulsion options
A. *Positive image* ***B.*** *Negative* ***C.*** *Negative with emulsion side down*

Important: *The emulsion and image exposure settings in the Print dialog box override any conflicting settings in the printer driver. Always specify print settings using the Print dialog box.*

Specify the emulsion and image exposure

1 Select Output on the left side of the Advanced Print Setup dialog box.

2 For Color, choose Separations.

3 For Flip, select one of the following options:

None Makes no changes to the orientation of the imageable area. Type that is in the image is readable (that is, "right reading") when the photosensitive layer is facing you. This is the default.

Horizontal Mirrors the imageable area across a vertical axis so that it is "wrong reading."

Vertical Mirrors the imageable area across a horizontal axis so that it is upside down.

Horizontal And Vertical Mirrors the imageable area across the horizontal and vertical axes so that it is wrong reading. Type is readable when the photosensitive layer is facing away from you. Images printed on film are often printed Horizontal And Vertical.

4 Select the Negative option for negative film; deselect it for positive film.

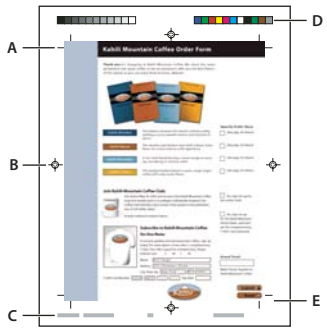
Note: *The Negative option is also available if you choose In-RIP Separations from the Color menu.*

Include marks and bleeds

You can place printer marks on the page to indicate the boundaries of document boxes supported by Adobe PDF, such as trim boxes and bleed boxes. These marks are not added as page content; however, they are included in the PostScript output.

The options in the Marks And Bleeds panel are unavailable under these circumstances:

- The PDF includes printer marks added using a different Acrobat feature, the Add Printer Marks tool.
- The crop, bleed, and trim boxes are all the same size. The crop box is defined in the Crop Box dialog box (choose Advanced > Print Production > Crop Pages). If the artwork contains a bleed, make sure that the crop box is big enough to accommodate the bleed box and other printer marks.



Printer marks
A. *Trim marks* ***B.*** *Registration marks* ***C.*** *Page information* ***D.*** *Color bars* ***E.*** *Bleed marks*

1 Select Marks And Bleeds on the left side of the Advanced Print Setup dialog box.

2 Choose the printer marks you want. The marks appear in the preview on the left side of the Advanced Print Setup dialog box.

See also

"Embed printer marks in a PDF" on page 463

Marks And Bleeds options

All Marks Creates all printer marks at once.

Line Weight Determines the weight of the lines for trim, bleed, and registration marks.

Style Determines the appearance of the marks. You can choose default InDesign marks, or marks from other applications as listed.

Trim Marks Places a mark at each corner of the trim area to indicate the PDF trim box boundaries.

Bleed Marks Places a mark at each corner of the bleed box to indicate the PDF bleed box boundaries. A bleed box defines the amount of extra area to image outside the defined page size.

Registration Marks Places marks outside the crop area for aligning the different separations in a color document.

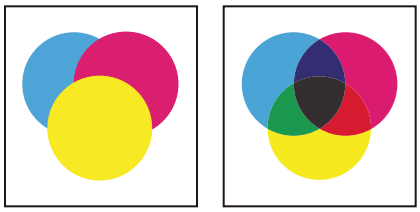
Color Bars Adds a small square of color for each grayscale or process color. Spot colors converted to process colors are represented using process colors. Your service provider uses these marks to adjust ink density on the printing press.

Page Information Places page information outside the crop area of the page. Page information includes the filename, page number, current date and time, and color separation name.

Printing color

Preview how colors overprint

Overprint Preview mode provides an on-screen simulation that approximates how blending and overprinting will appear in color-separated output. Overprinting effects can also be simulated when you output to a composite printing device. Both of these methods are useful for proofing documents that will be color separated.



Compare appearance of artwork on-screen (left) with printed artwork (right).

❖ With the PDF open, choose Advanced > Print Production > Overprint Preview.

The overprint display turns on or off. If overprint previewing is on, a check mark appears next to the Overprint Preview command.

Managing color

When you print a color-managed RGB or CMYK document, you can specify additional color management options to keep color consistent in the output. For example, suppose the document contains a profile tailored for prepress output, but you want to proof the colors on a desktop printer. In the Output panel of the Advanced Print settings dialog box, you can temporarily convert the document's colors to the color space of the desktop printer—the printer profile is used instead of the current document profile when printing. In addition, you can send color data as RGB values to printers using various RGB profiles.

See also

"Understanding color management" on page 402

"Keeping colors consistent" on page 404

"Color-managing documents when printing" on page 412

"Working with color profiles" on page 414

About composite printing

When you print a color PDF, all of the colors used in the file print on one plate. This process is called *composite printing*. The options available in the Output panel of the Advanced Print Setup dialog box depend on the selected printer.

Artwork that will be commercially reproduced and that contains more than a single color must be printed on separate master plates, one for each color. This process is called *color separation*. If you're creating color separations, you can print a color or grayscale composite proof to check your work.

Note: *To create color separations, you need Acrobat 8 Professional or Acrobat 3D Version 8.*

Consider the following issues when printing composites:

- Any overprinting options that you select print correctly only on a printer that supports overprinting. Since most desktop printers don't support overprinting, you can simulate the effects of overprinting by selecting Simulate Overprinting in the Output panel of the Advanced Print Setup dialog box. Be aware that selecting Simulate Overprinting converts spot colors to process colors for printing. If you intend to use a file for final output, do not select this option.
- When you print to a black-and-white printer, a grayscale composite version of the pages is produced (unless you select Print Color As Black in the main Print dialog box; this option prints all nonwhite color as black). If the document contains color, visually correct grays are used to simulate that color. For example, the gray that simulates a 20% tint of yellow is lighter than a 20% tint of black, since yellow is visually lighter than black.

Note: *Remember that, like monitors, color printers vary greatly in color reproduction quality; thus, proofs from your service provider are the best way to verify how the finished piece will look.*

See also

"About separations" on page 441

Print a color composite

1 Choose File > Print, and choose a printer.

2 Specify page handling options.

3 Choose Document And Stamps from the Comments And Forms menu to print all visible content.

4 Click Advanced, and select Output on the left side of the dialog box.

5 Choose a composite option from the Color menu.

6 Specify other color and output settings, and click OK.

7 If the document contains objects with transparency settings, select an option from the Transparency Flattening Preset menu.

8 (PostScript printing only) In the PostScript Options panel, specify options.

See also

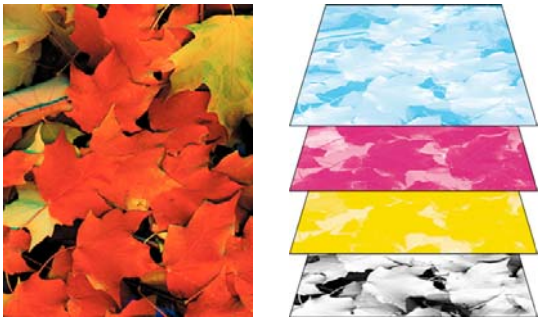
"About flattening" on page 465

About separations

To produce high-quality separations, it helps to be familiar with the basics of printing, including line screens, resolution, process colors, and spot colors.

If you are using a print service provider to produce separations, you'll want to work closely with its experts before beginning each job and during the process.

To reproduce color and continuous-tone images, printers usually separate artwork into four plates—one plate for each of the cyan (C), yellow (Y), magenta (M), and black (K) portions of the image. When inked with the appropriate color and printed in register with one another, these colors combine to reproduce the original artwork. The process of dividing the image into two or more colors is called color separating, and the films from which the plates are created are called the *separations*.



Composite (left) and separations (right)

Print color separations

Acrobat supports host-based separations and in-RIP separations. The main difference between them is where the separations are created—at the host computer (the system using Acrobat and the printer driver) or at the output device's RIP.

For host-based separations, Acrobat creates PostScript information for each of the separations required for the document and sends that information to the output device. For in-RIP separations, the work of separating a file is performed by the RIP. This method often takes less time than creating host-based separations, but it requires a PostScript 3 output device with in-RIP separation capability. To produce in-RIP separations, you need a PPD file that supports in-RIP separations, and any PostScript 3 output device or a PostScript Level 2 device whose RIP supports in-RIP separations.

See also

"Previewing output" on page 454

"About preflight inspections" on page 473

Prepare to print separations

❖ Before you print separations, do the following:

- Calibrate your monitor. See "Calibrate and profile your monitor" on page 416.

- Specify whether the document contains trapping information, if known. See "Declare the presence of trapping information" on page 442.
- Preview separations and transparency flattening results. See "Preview color separations" on page 456 and "Preview which areas of artwork will be flattened" on page 467.
- Run preflight inspections using desired criteria. See "Preflight profiles" on page 483.

Note: *If you use a print service provider to produce separations, you'll want to work closely with its experts before beginning each job and throughout the process.*

Print separations

1 Choose File > Print, and choose a printer.

2 Choose an option from the Comments And Forms menu.

3 Choose print range and page handling options.

4 Click Advanced.

5 If you created a custom printer settings file with the appropriate separation settings, choose it from the Settings menu at the top of the Advanced Print Setup dialog box.

6 Select Output on the left, and choose an option from the Color menu:

- Choose Separations if the PPD doesn't support in-RIP separations.
- Choose In-RIP Separations if the PPD supports in-RIP separations. Trapping options appear. From the menu, choose Adobe In-RIP or Off. If you choose Adobe In-RIP, click Trap Presets and select a preset. Click OK.

7 Specify settings for halftone screen frequency and the angle at which the selected ink's halftone screen is rotated.

8 If the document contains objects with transparency settings, select an option from the Transparency Flattening Preset menu.

9 Under Ink Manager, deselect any color you don't want to separate.

The four process colors (cyan, magenta, yellow, and black) always appear at the top of the color plate list, followed by spot colors in alphabetical order.

10 Click the Ink Manager button to modify ink settings for color separations.

11 Click Marks And Bleeds on the left, and select All Marks.

12 Click PostScript Options on the left, and select settings as needed. Click OK to close the dialog box, and then click OK again to print the separations.

Declare the presence of trapping information

If you are sending your PDF files to a print service provider, you can use the Document Properties dialog box to specify whether a PDF contains trapping information. This detail can help prevent the service provider from adding potentially conflicting trapping commands to the file. Trapping information can either be imported with other PostScript information from the authoring application, or it can be created in Acrobat using trapping presets supported by Adobe In-RIP Trapping.

1 Open the PDF file, and choose File > Properties.

2 Click the Advanced tab.

3 Choose an option from the Trapped menu, and click OK.

Yes The file contains trapping information.

No The file doesn't contain trapping information.

Unknown You don't know whether the file contains trapping information.

See also

"Adobe In-RIP trapping" on page 447

Saving separations as PostScript

Depending on the prepress software available, a service provider may be able to perform such prepress activities as trapping, imposition, separating, and OPI replacement at the output device's RIP. Therefore, your service provider may prefer to receive a composite PostScript file of the document optimized for in-RIP separations rather than a preseparated PostScript file.

Saving the file as PostScript preserves the separation settings, the PPD information, and any color conversions you have specified in the Advanced Print Setup dialog box.

For best results when generating PostScript for reuse in a print production workflow, use the Save As command rather than the Print To File option available in the Print dialog box.

See also

"PostScript options" on page 434

Chapter 16: Print production tools

Whether you're a designer working on a creative piece or a print service provider preparing an Adobe PDF for final output, you'll find the print production tools essential to getting your job done.

Quickstart

The following topics provide overview steps for some common print production tasks.

Convert colors to a different space

For high-end output, you can convert document colors to a different color space—for example, from RGB to CMYK.

1 Choose Advanced > Print Production > Convert Colors.

2 For each of the document colors listed, select a conversion option from the Action menu.

3 Specify the destination space profile, blending profile, and other conversion options.

Use the TouchUp Object tool (Tools > Advanced Editing) to convert the color space of individual objects.

See also

"Convert colors to a different color space" on page 459

Separate spot colors as process

Converting a spot color is useful if the PDF contains more spot colors than are practical to print.

1 Choose Advanced > Print Production > Ink Manager.

2 Do one of the following:

- To convert individual colors, click the ink-type icon to the left of the spot color.
- To convert all spot colors, click Convert All Spots To Process.

Converting all spot colors removes ink aliases and may affect overprinting and trapping settings.

See also

"Separate spot colors as process" on page 462

Add printer marks

Add printer marks to a PDF to aid in prepress file preparation. You can add trim, bleed, and registration marks, as well as color bars and page information.

1 Choose Advanced > Print Production > Add Printer Marks.

2 Specify the desired marks.

3 Specify the pages to mark.

You can also add marks temporarily to a document using the Advanced Print Setup dialog box.

See also

"Embed printer marks in a PDF" on page 463

Preview transparency flattening

Use the transparency preview options to view objects in a PDF that are transparent, as well as those that will be affected by transparency flattening.

1. Choose Advanced > Print Production > Flattener Preview.
2. Select a preview setting from the Highlight menu and a resolution level from the Preset menu.
3. Set desired options, such as the raster-to-vector balance and the line art, text, gradient, and mesh resolutions.
4. Specify where you want to apply the changes.

See also

"Transparency flattening" on page 465

Create flattener presets

You can automate the flattening process by saving flattening settings in a transparency flattener preset.

1. Choose Advanced > Print Production > Flattener Preview.
2. Choose the preset you want to base your new preset on, and then change the settings as desired.
3. Click Save and name the new preset.

If you need to start over, press the Reset button. Custom presets are immediately available from the Preset menu.

See also

"Create a flattener preset" on page 470

Tools for high-end output

Print production tools overview

Adobe Acrobat adds sophisticated print production tools that enable a complete PDF workflow for high-end color output. The print production tools are in the Advanced menu and on the Print Production toolbar.



Print Production toolbar
A. *Trap Presets* ***B.*** *Output Preview* ***C.*** *Preflight* ***D.*** *Convert Colors* ***E.*** *Ink Manager* ***F.*** *Add Printer Marks* ***G.*** *Crop Pages* ***H.*** *Fix Hairlines* ***I.*** *Flattener Preview* ***J.*** *PDF Optimizer* ***K.*** *JDF Job Definitions*

Open the Print Production toolbar

❖ Choose Advanced > Print Production > Show Print Production Toolbar.

Print Production tools

Trap Presets Allows you to create and apply trap settings for later execution by an Adobe PostScript 3 RIP that licenses Adobe In-RIP Trapping.

Output Preview Combines separation preview, soft proofing, color warnings, the full Ink Manager, and more in one convenient dialog box.

Preflight Allows you to perform more than 400 predefined checks for all the common output errors that can come with a designer's file, and then correct all fixable errors. Preflight also checks files for PDF/X compliance, password protection of preflight profiles, PostScript level compatibility, and more.

Convert Colors Converts RGB, CMYK, and Grayscale color spaces to the target color space. Convert Colors also allows you to embed PDFs with ICC profiles.

Ink Manager Modifies the way inks are treated while the current PDF is open. The Acrobat Ink Manager uses the same options and controls as other Adobe applications.

Add Printer Marks Adds standard printer marks to a PDF page for positioning. These marks are embedded in the PDF.

Crop Pages Allows you to define the crop, trim, bleed, art, and media boxes on a page. The elements are important for proper page positioning and placement of printer marks, especially for imposition.

Fix Hairlines Finds hairlines and replaces them with heavier-weight lines.

Flattener Preview Provides flattener presets to control the amount of rasterization that occurs during print output or export to certain file formats, such as EPS. You can save these settings as a preset for future use. This tool also includes a preview for viewing transparent objects and the effects your settings will have on those objects.

PDF Optimizer Provides many settings for inspecting, analyzing, and repairing documents, as well as eliminating unneeded content to reduce file size.

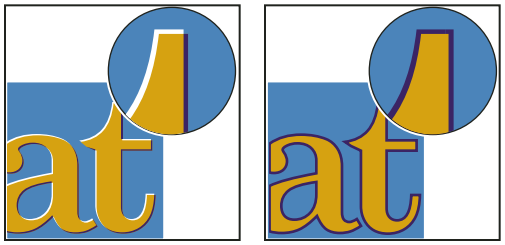
JDF Job Definitions Allows you to create custom job definitions that can be edited and used in a production environment. The JDF file may also include information necessary for the creation of PDFs appropriate for the production process, including PDF conversion settings and preflight profiles.

Trapping color

About ink trapping

When an offset printed document uses more than one ink on the same page, each ink must be printed *in register* (perfectly aligned) with any other inks that it abuts, so that there is no gap where the different inks meet. However, it's impossible to ensure exact registration for every object on every sheet of paper running through a printing press, so *misregistration* of inks can occur. Misregistration causes an unintended gap between inks.

You can compensate for misregistration by slightly expanding one object so that it overlaps an object of a different color—a process known as *trapping*. By default, placing one ink over another *knocks out*, or removes, any inks underneath to prevent unwanted color mixing; but trapping requires that inks *overprint,* or print on top of each other, so that at least a partial overlap is achieved.



Misregistration with no trap (left) and with trap (right)

Most traps employ *spreading*—expanding a light object into a dark object. Because the darker of two adjacent colors defines the visible edge of the object or text, expanding the lighter color slightly into the darker color maintains the visual edge.

Adobe In-RIP trapping

Acrobat can automatically trap color documents with the Adobe In-RIP Trapping engine, which is available on Adobe PostScript output devices that support Adobe In-RIP Trapping.

Adobe In-RIP Trapping can precisely calculate and apply any necessary adjustments to the edges of type and graphics throughout your document. It can apply effective trapping techniques to different parts of a single object, even if the object overlaps several different background colors. Trapping adjustments are made automatically, and you can define trap presets to address the trapping requirements of specific page ranges. The effects of trapping are apparent only on color separations generated by the trapping engine; you cannot see the results on-screen within the program.

The trapping engine decides where to trap by detecting contrasting color edges. It then creates traps based on the neutral densities (lightness or darkness) of abutting colors, in most cases by spreading lighter colors into adjacent darker colors. The trapping settings you specify in the Trap Presets palette modify the trapping engine's results.

Requirements

Adobe In-RIP Trapping requires the following software and hardware:

- A PPD (PostScript Printer Description) file for a printer that supports Adobe In-RIP Trapping. You must select this PPD by using the operating system driver.
- An Adobe PostScript Level 2 or later output device that uses a RIP that supports Adobe In-RIP Trapping. To find out if a PostScript output device supports Adobe In-RIP Trapping, contact the manufacturer or your print service provider.

See also

"About PPD files" on page 433

Trap a PDF

Trapping is a complex process that depends on the interaction of various color, ink, and printing factors; the correct settings vary, depending on specific press conditions. Do not change the default trap settings unless you've consulted with your print service provider.

1 If necessary, choose Advanced > Print Production > Trap Presets to create a trap preset with custom settings for your document and printing press conditions.

2 Assign the trap preset to a page range.

3 Choose File > Print to open the Print dialog box, and then click Advanced.

4 Select Output from the list on the left.

5 For Color, choose In-RIP Separations.

6 For Trapping, choose Adobe In-RIP.

Note: *This option works only when you target an output device that supports Adobe In-RIP Trapping.*

7 Click Ink Manager. As necessary, select an ink, specify the following options (only if your service provider recommends changing the settings), and then click OK:

Type Choose an ink type that describes the selected ink.

Neutral Density Type a value that differs from the default.

Trapping Sequence Type a value to set the order in which inks are printed.

8 Continue specifying other print options, and then click OK to print your document.

See also

"Adjusting ink neutral density values" on page 453

"Customize trapping for specialty inks" on page 453

"Adjust the trapping sequence" on page 454

Specify settings using trap presets

A *trap preset* is a collection of trap settings you can apply to pages in a PDF. Use the Trap Presets dialog box for entering trap settings and saving a collection of settings as a trap preset. If you don't apply a trap preset to a trapping page range, that page range will use the [Default] trap preset, a collection of typical trap settings that are applied to all pages of a new document.

Note: *In Acrobat, trap presets and their assignments apply to the document only while it is open; trap settings are not saved in the PDF. This behavior is different from InDesign, where trap presets and their assignments are saved with the InDesign document.*

Create or modify a trap preset

1 Choose Advanced > Print Production > Trap Presets.

2 Select an existing preset as a starting point, and then click Create.

3 Specify the following options, and then click OK:

Name Type a name for the preset. You cannot change the name of either of the two built-in presets: [No Trap Preset] and [Default].

Trap Width Type values to specify the amount of overlap for inks.

Trap Appearance Specify options for controlling the shape of the traps.

Images Specify settings that determine how to trap imported bitmap images.

Trap Thresholds Type values to specify the conditions under which trapping occurs. Many variables affect the values you'll need to enter here. For more information, consult with your print service provider, and see the other trapping topics.

Delete a trap preset

1 In the Assign Trap Presets dialog box, select the preset(s), and then click the Delete button.

2 Click OK to confirm the deletion.

Note: *You cannot delete either of the two built-in presets: [No Trap Preset] and [Default].*

Assign a trap preset to pages

You can assign a trap preset to a document or to a range of pages in a document. Pages with no abutting colors will print faster if you disable trapping on those pages. Trapping doesn't actually occur until you print the document.



Trap assignments list presets you have applied to various pages; trap assignments are updated each time you click Assign.

1 In the Assign Trap Presets dialog box, click Assign.

2 For Trap Preset, choose the preset you want to apply.

3 Select the pages you want to apply the trap preset to.

4 Click Assign, and then click OK.

Note: *If you click OK without clicking Assign, the dialog box closes without making any changes to the trap assignments. Trap assignments previously made using the Assign button are preserved.*

Disable trapping on pages

1 In the Trap Presets dialog box, click Assign.

2 Select the pages you want to disable trapping on and choose [No Trap Preset] in the Trap Preset menu.

3 Click Assign, and then click OK.

Trap preset options

You can change trap preset options whenever you create or edit a trap preset. The same trap preset options are available in Acrobat and InDesign. In Acrobat, you can view trap presets by choosing Tools > Print Production > Trap Presets. In InDesign, choose Window > Output > Trap Presets.

Trap widths

Trap width is the amount of overlap for each trap. Differences in paper characteristics, screen rulings, and printing press conditions require different trap widths. To determine the appropriate trap widths for each job, consult your commercial printer.

Default Specifies the trap width in points for trapping all colors except those involving solid black. The default value is 0p0.25.

Black Indicates the distance that inks spread into solid black, or the *holdback amount*—the distance between black edges and underlying inks for trapping rich blacks. The default value is 0p0.5. This value is often set to be 1.5 to 2 times the value of the default trap width.

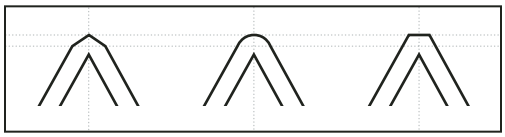
In InDesign, the value you set for Black Color determines the value for a solid black or a *rich black*, a process black (K) ink mixed with color inks for increased opacity and richer color.

Note: *(InDesign) If you choose Application Built-In trapping, and you specify a Default trap width or Black trap width larger than 4 points, the resulting trap width is limited to 4 points. However, the value you specified will continue to be displayed, because if you switch to Adobe In-RIP Trapping, traps larger than 4 points are applied as you specified.*

Trap appearance

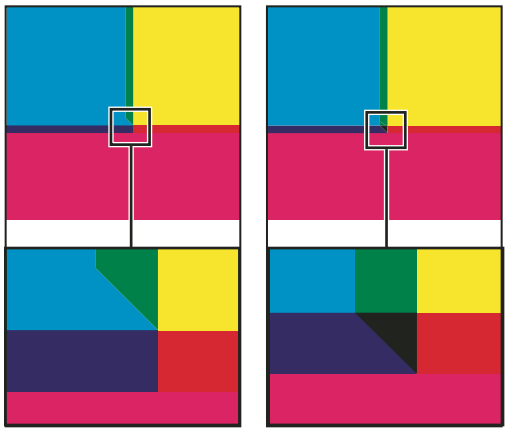
A *join* is where two trap edges meet at a common end point. You can control the shape of the outside join of two trap segments and the intersection of three traps.

Join Style Controls the shape of the outside join of two trap segments. Choose from Miter, Round, and Bevel. The default is Miter, which matches earlier trapping results to retain compatibility with previous versions of the Adobe Trapping Engine.



Trap join examples, left to right: miter join, round join, bevel join

End Style Controls the intersection of three-way traps. Miter (the default) shapes the end of the trap to keep it away from the intersecting object. Miter also matches earlier trapping results to retain compatibility with previous versions of the Adobe Trapping Engine. Overlap affects the shape of the trap generated by the lightest neutral density object that intersects with two or more darker objects. The end of the lightest trap is wrapped around the point where the three objects intersect.



Close-up of trap end examples: miter (left) and overlap (right)

Trap thresholds

You can adjust trap thresholds, as recommended by your prepress service provider, to correspond to your printing conditions.

Step Specifies the color change threshold at which the trapping engine creates a trap. Some jobs need only the most extreme color changes trapped, while others require traps for more subtle color changes. The Step value indicates the degree to which components (such as CMYK values) of abutting colors must vary before trapping occurs.

To change how much the component inks in abutting colors can vary before causing those colors to trap, increase or decrease the value for Step. The lower the Step value, the more often traps are created between colors. The default is 10%. For best results, use a value from 8% to 20%. Lower percentages increase sensitivity to color differences and result in more traps.

Black Color Indicates the minimum amount of black ink required before the Black trap width setting is applied. The default value is 100%. For best results, use a value no lower than 70%.

Black Density Indicates the neutral density value at or above which InDesign considers an ink to be black. For example, if you want a dark spot ink to use the Black trap width setting, enter the neutral density value here. This value is typically set near the default of 1.6.

Sliding Trap Indicates the percentage difference (between the neutral densities of abutting colors) at which the trap is moved from the darker side of a color edge toward the centerline, to prevent abrupt shifts in trap placement and create a more elegant trap. During trapping, the trapping engine adjusts (slides) the trap position—from spreading the lighter color into the darker one, to straddling the centerline between them.

For example, setting the Sliding Trap value to 70% moves the point at which the trap begins to straddle the centerline to the location where the lighter color exceeds 70% of the darker color in neutral density (lighter color's neutral density divided by darker color's neutral density > 0.70). Colors of identical neutral density will always have their traps exactly straddle the centerline, unless the Sliding Trap is set to 100%.

Trap Color Reduction Indicates the degree to which components from abutting colors are used to reduce the trap color. This setting is useful for preventing certain abutting colors (such as pastels) from making an unsightly trap that is darker than either color. Specifying a Trap Color Reduction lower than 100% begins to lighten the color of the trap; a Trap Color Reduction value of 0% makes a trap with a neutral density equal to the neutral density of the darker color.

Trapping imported graphics

You can create a trap preset to control traps within images, and to control traps between bitmap images (such as photographs and those saved in raster PDF files) and vector objects (such as those from a drawing program and vector PDF files). Each trapping engine handles imported graphics differently. It's important to be aware of these differences when setting trapping options.

Trap Placement Provides options for determining where the trap falls when you trap vector objects (including objects drawn in InDesign) to bitmap images. All options except Neutral Density create a visually consistent edge. Center creates a trap that straddles the edge between objects and images. Choke causes objects to overlap the abutting image. Neutral Density applies the same trapping rules as used elsewhere in the document. Trapping an object to a photograph with the Neutral Density setting can result in noticeably uneven edges as the trap moves from one side of the edge to another. Spread causes the bitmap image to overlap the abutting object.

Trap Objects To Images Ensures that vector objects (such as frames used as keylines) trap to images, using the Trap Placement settings. If vector objects don't overlap images in a trapping page range, consider turning this option off to speed trapping of that page range.

Trap Images To Images Turns on trapping along the boundary of overlapping or abutting bitmap images. This feature is on by default.

Trap Images Internally Turns on trapping among colors within each individual bitmap image (not just where they touch vector artwork and text). Use this option only for page ranges containing simple, high-contrast images, such as screen shots or cartoons. Leave it unselected for continuous-tone and other complicated images, as it will create bad traps. Trapping is faster when this option is unselected.

Trap 1-Bit Images Ensures that 1-bit images trap to abutting objects. This option doesn't use the Image Trap Placement settings, because 1-bit images use only one color. In most cases, leave this option selected. In some cases, such as with 1-bit images where pixels are widely spaced, selecting this option may darken the image and slow the trapping.

About trapping black

When creating or editing presets, the value you type for Black Color determines what is considered solid black and rich black. A *rich black* is any black color that uses a *support screen*—additional percentages of one or more process inks to strengthen the black.

The Black Color setting is useful when you must compensate for extreme dot gain (as when using low-grade paper stock). These situations cause black percentages lower than 100% to print as solid areas. By screening back blacks or rich blacks (using tints of solid black) and decreasing the Black Color setting from its default of 100%, you can compensate for dot gain and ensure that the trapping engine will apply the proper trap width and placement to black objects.

When a color reaches the Black Color value, the Black trap width value is applied to all abutting colors, and *keepaway traps* are applied to rich black areas using the Black trap width value.

If support screens extend all the way to the edge of a black area, any misregistration causes the edges of support screens to become visible, creating an unwanted halo or distorting the edges of objects. The trapping engine uses a keepaway, or a *holdback,* for rich blacks to keep support screens a specified distance away from edges of reversed-out or light elements in the foreground, so that the light elements retain their sharpness. You control the distance of support screens from the edges of black areas by specifying the Black trap width value.

Note: *Don't worry that the Black trap width setting will be too wide for trapping thin elements, such as black keylines around graphics. In those cases, the trapping engine automatically overrides the Black trap width setting and limits the trap to half the width of the thin element.*

Adjusting ink neutral density values

By adjusting the ink neutral density (ND) values that the selected trapping engine uses, you can determine the precise placement of traps. The default ND values for process inks are based on the neutral density readings of process ink swatches that conform to industry standards in different parts of the world. The language version determines which standard it conforms to. For example, the ND values for the U.S. English and Canadian versions conform to the Specifications for Web Offset Publications (SWOP) solid ink density values published by the Graphic Arts Technical Foundation of North America. You can adjust process ink neutral densities to match printing industry standards in other parts of the world.

The trapping engine derives the ND values for a spot color from its CMYK equivalent. For most spot colors, the ND values of their CMYK equivalents are accurate enough for proper trap creation. Spot inks that aren't easily simulated using process inks, such as metallic inks and varnishes, may need their ND values adjusted so that the trapping engine can trap them correctly. By typing new values, you can ensure that an ink that is observably darker or lighter is recognized that way by the trapping engine; the appropriate trap placement is then applied automatically.

You can get the appropriate neutral density value for a given ink by asking your commercial printer. The most accurate method of determining an ink's ND value is by measuring a swatch of the ink with a commercial densitometer. Read the "V" or visual density of the ink (don't use process filters). If the value differs from the default setting, type the new value in the ND text box.

Note: *Changing the neutral density for a spot color affects only how that color will trap. It doesn't change the appearance of that color in your document.*

Follow these guidelines when adjusting ND values:

Metallic and opaque inks Metallic inks are usually darker than their CMYK equivalents, while opaque inks obscure any ink beneath them. In general, you should set the ND values for both metallic and opaque spot colors much higher than their default values to ensure that these spot colors won't spread.

Note: *Setting an ink to Opaque or Opaque Ignore in the Type menu of the Ink Manager prevents an opaque ink from spreading into other colors, unless another opaque ink has a higher ND value.*

Pastel inks These inks are normally lighter than their process equivalents. You may want to set the ND value for these inks lower than their default values to ensure that they spread into adjacent darker colors.

Other spot inks Some spot colors, such as turquoise or neon orange, are significantly darker or lighter than their CMYK equivalents. You can determine whether this is the case by comparing printed swatches of the actual spot inks to printed swatches of their CMYK equivalents. You can adjust the spot ink's ND value higher or lower as necessary.

Customize trapping for specialty inks

Using certain inks involves special trapping considerations. For example, if you are using a varnish on your document, you don't want the varnish to affect trapping. However, if you're overprinting certain areas with a completely opaque ink, you don't need to create traps for items underneath. Ink options are available for these situations. It's usually best not to change the default settings, unless your prepress service provider recommends changing them.

Note: *The speciality inks and varnishes used in the document may have been created by mixing two spot inks or by mixing a spot ink with one or more process inks.*

1 Open the Ink Manager and select an ink that requires special treatment.

2 For Type, choose one of the following options, and then click OK:

Normal Use for traditional process inks and most spot inks.

Transparent Use for clear inks to ensure that underlying items trap. Use this option for varnishes and dieline inks.

Opaque Use for heavy, nontransparent inks to prevent trapping of underlying colors but allow for trapping along the ink's edges. Use this option for metallic inks.

Opaque Ignore Use for heavy, nontransparent inks to prevent trapping of underlying colors and to prevent trapping along the ink's edges. Use this option for those inks, such as metallics and varnishes, that have undesirable interactions with other inks.

Adjust the trapping sequence

The trapping sequence (also called the *trapping order*) matches the order in which inks are printed at the press, but it doesn't match the order in which separations are produced at the output device.

The trapping sequence is particularly important when you're printing with multiple opaque colors, such as metallic inks. Opaque inks with lower sequence numbers are spread under opaque inks with higher sequence numbers. This process prevents the last applied ink from being spread, and it still creates good traps.

Note: *Don't alter the default trapping sequence without first consulting with your prepress service provider.*

1 Open the Ink Manager. The current trapping sequence is displayed in the Sequence column of the inks list.

2 Select an ink, type a new value for Trapping Sequence, and then press Tab. The sequence number of the selected ink changes, and the other sequence numbers change accordingly.

3 Repeat the previous step for as many inks as necessary, and then click OK.

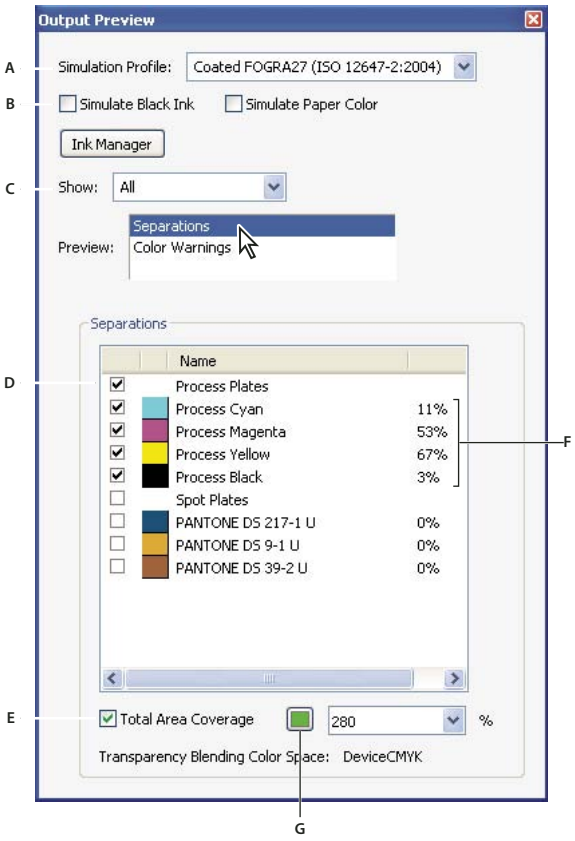
Previewing output

Output Preview dialog box overview

The Output Preview dialog box simulates how your PDF looks in different conditions. The top part of the dialog box has several controls for previewing how your document will look in print. The Preview menu allows you to switch between previewing separations and previewing color warnings. When you select Separations, the bottom half of the dialog box lists information about the inks in the file, as well as ink warning controls and total area coverage controls. When you select Color Warnings, a warnings section replaces the separations section. The preview settings you specify in the Output Preview dialog box are reflected directly in the open document.

Output Preview also includes access to the complete Ink Manager (as seen in the rest of Adobe Creative Suite) for remapping spot-color inks in both printing and previewing. Ink mapping for previewing only applies when the Output Preview dialog box is open.

Note: *If you are using a color management system (CMS) with accurately calibrated ICC profiles and have calibrated your monitor, the on-screen separation preview colors more closely match the final color separation output.*



Output Preview dialog box with separations selected
***A.** Simulation Profile **B.** Simulate options **C.** Show options **D.** Separations list **E.** Total Area Coverage options **F.** Ink percentages **G.** Color display option*

See also

"About color profiles" on page 414

"About monitor calibration and characterization" on page 415

"Ink Manager overview" on page 461

"Soft-proofing colors" on page 410

Open the Output Preview dialog box

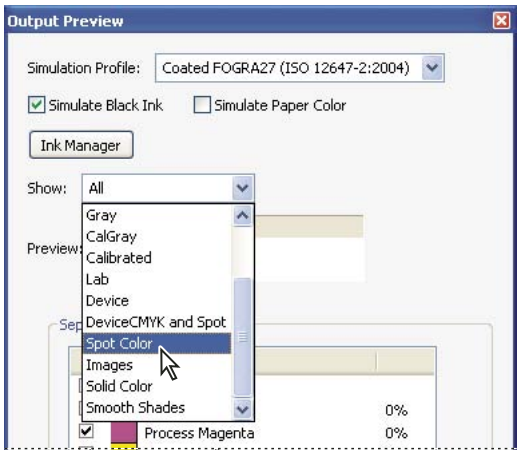
❖ Do one of the following:

- Choose Advanced > Print Production > Output Preview.
- Select the Output Preview tool on the Print Production toolbar.

View colors by source space

You can limit which colors are displayed in the preview. When you select a source color space, you see only the objects in that color space. Limiting colors is useful, for example, for seeing whether a page contains any RGB color or where a spot color is used.

❖ In the Output Preview dialog box, select All or a single source from the Show menu.



Output Preview dialog box configured for showing spot colors

Preview color separations

You can preview separation plates and ink coverage to ensure that the printed piece meets your requirements. Although previewing separations on your monitor can help you detect problems without the expense of printing separations, it does not let you preview trapping, emulsion options, printer marks, and halftone screens and resolution. Those settings are best verified with your print service provider using integral or overlay proofs.

Note: *Objects on hidden layers are not included in an on-screen preview.*

1 In the Output Preview dialog box, choose Separations from the Preview menu.

2 Do any of the following:

- To view one or more separations, select the empty box to the left of each separation name. Each separation appears in its assigned color.
- To hide one or more separations, deselect the box to the left of each separation name.
- To view all process or spot plates at once, select the box for Process Plates or Spot Plates.

Note: *A single process or spot plate appears as a black plate. This makes objects on a light-colored plate, such as yellow, appear more visible.*

See also

"Separate spot colors as process" on page 462

Check ink coverage

Too much ink can saturate paper and cause drying problems or change the expected color characteristics of the document. Total Area Coverage specifies the total percentage of all inks used. For example, 280 means 280% ink coverage, which could be accomplished with 60C, 60M, 60Y, and 100K. Ask your print service provider for the maximum ink coverage of the press you will be printing on. You can then preview the document to identify areas where total ink coverage exceeds the press's limit.

1 In the Output Preview dialog box, choose Separations from the Preview menu.

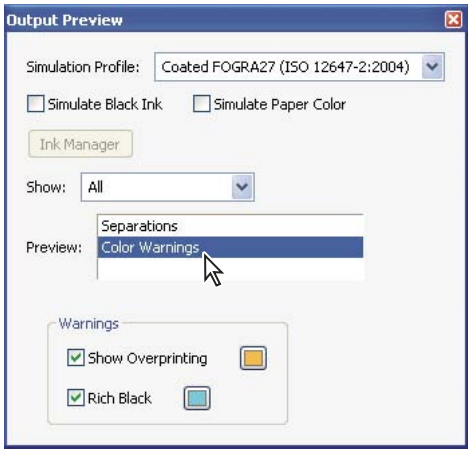
2 Do one of the following:

- To check for specific area coverage, use the pointer to hover over that area in the document window. Ink coverage percentages appear in the ink list next to each ink name.
- To check for total document coverage, select Total Area Coverage, and choose a number from the pop-up menu or type a percentage in the box.

You can adjust ink coverage by converting some spot colors to process colors using the Ink Manager.

View color warnings

Output problems can occur when a document's colors are not reproducible on a particular press, or when rich black is used unintentionally on type. To diagnose such color problems before handing off a PDF for high-end output, you can use the various color warnings in the Output Preview dialog box. Pixels in areas that trigger the warning are displayed in the warning color, which is identified by the swatch color next to the warning type.



Output Preview dialog box configured for viewing color warnings

1 In the Output Preview dialog box, select the profile from the Simulation Profile menu that describes the target output device.

2 Choose Color Warnings from the Preview menu.

3 Select either or both of the following options:

Show Overprinting Indicates where on the page overprinting will appear in color-separated output. If you select Simulate Overprinting in the Output panel of the Advanced Print Setup dialog box, you can also see overprinting effects when you output to a composite printing device. This option is useful for proofing color separations.

Rich Black Indicates areas that will print as rich black—process black (K) ink mixed with color inks for increased opacity and richer color. Rich-black objects knock out the colors beneath, preventing background objects from showing through. This effect is usually desirable only for large, black, display type. In most cases, rich black is undesirable for body type, and is usually the result of an error, such as using RGB instead of CMYK for the type.

To change the warning color used in the preview, select a color from the swatches color picker.

See also

"Soft-proof colors (Acrobat)" on page 412

Color conversion and ink management

About color conversion

Colors must often be converted when they are displayed on a monitor or sent to a printer. Conversion is necessary when the color models do not match (for example, when CMYK color is displayed on an RGB monitor, or when a document with images in an RGB color space is sent to a printer).

Acrobat uses the source color spaces of objects in a PDF to determine what (if any) color conversion is required, for example, from RGB to CMYK. If a PDF contains objects with embedded color profiles, Acrobat manages the colors using the embedded profiles rather than the default color spaces. For images and other objects in the PDF that contain embedded color profiles, Acrobat uses the information in the profile to determine how to handle the appearance of the color. For objects with managed colors (those with embedded color profiles), this conversion is well understood. Unmanaged colors, however, do not use profiles, so one must be temporarily used for the purpose of conversion. The Color Management panel of the Preferences dialog box provides profiles for converting unmanaged colors. You can also select specific profiles based on local press conditions.

See also

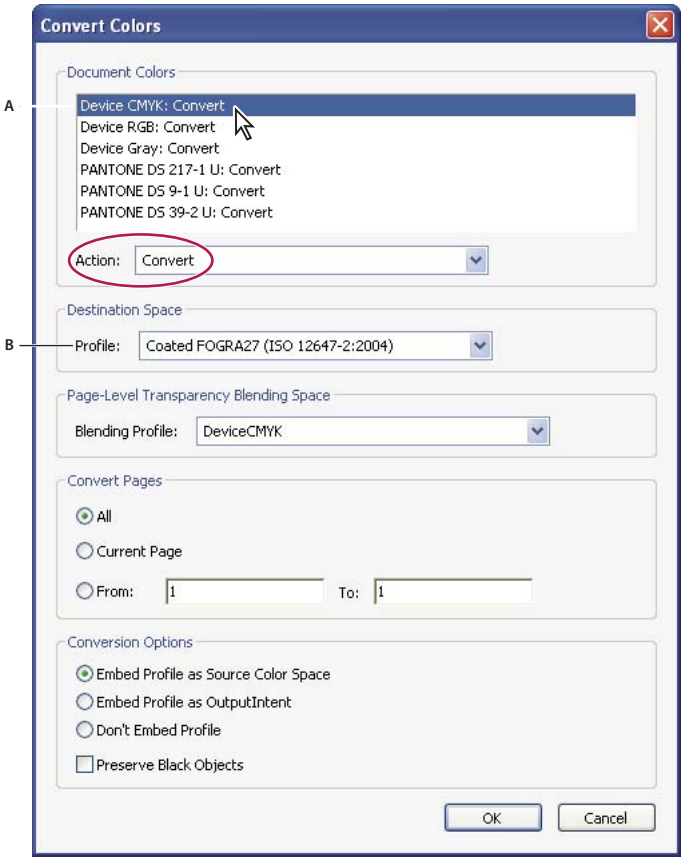
"Why colors sometimes don't match" on page 402

"Working with color profiles" on page 414

Convert Colors dialog box overview

If your PDF will be output to a high-end device or incorporated in a prepress workflow, you can convert color objects in the document to CMYK or another color space. Unlike other Acrobat features that temporarily convert colors during printing or viewing, but leave the document colors unchanged, the Convert Colors feature actually changes the color values in the document. In the Convert Colors dialog box, you can convert the colors of a single page or an entire document.

Note: *The Convert Colors dialog box converts all colors in the document to the destination color space. To convert only the colors of selected objects, use the TouchUp Object tool.*



Convert Colors dialog box
***A.** Document Colors **B.** Destination Space Profiles*

Open the Convert Colors dialog box

❖ Do one of the following:

- Choose Advanced > Print Production > Convert Colors.
- Select the Convert Colors tool on the Print Production toolbar.

Convert colors to a different color space

Depending on the color spaces you select, color conversion either preserves, converts, or maps color values from the source color space to the specified destination space as follows:

- Objects with untagged RGB data (DeviceRGB) convert from the working space RGB profile to the CMYK gamut of the destination space. The same is done with untagged CMYK (DeviceCMYK) and grayscale (DeviceGray) values.
- Objects in device-independent color spaces (CalGray, CalRGB, or Lab) can be preserved or converted. If converted, Acrobat uses the device-independent object's embedded profile information.
- Objects set in spot colors (including Separation, DeviceN, and NChannel color spaces) can be preserved, converted, or mapped (aliased) to any other ink present in the document. Spot colors can also be mapped to a CMYK process color, if the process color model of the destination space is CMYK. Spot colors mapped to other inks can be previewed in the Output Preview dialog box.

See also

"Working with color profiles" on page 414

"Previewing output" on page 454

"Create an ink alias for a spot color" on page 463

"About rendering intents" on page 423

Convert document colors

1 In the Convert Colors dialog box, select an option from the list of color spaces and colorants used in the document.

2 Select an option from the Action menu:

Preserve Keeps objects in the selected color space when the document is output.

Convert Uses the destination space profile to convert color objects to a common ICC profile for an output device.

Decalibrate Removes embedded profiles from the color objects in that color space (or alternate space, if one is specified for a spot color).

Map To Process [color] Maps spot colors to the destination space by way of another ink, called an alias. The Convert Colors dialog box uses the settings in the Ink Manager as a starting point. If an alias is set up in the Ink Manger, it will also be set up in the Convert Colors dialog box.

3 Specify the space to which colors will be converted. The destination profile defines the target output device for the converted color spaces.

4 If the PDF includes groups of transparent objects, specify a blending space for the pages set for conversion. Choose a device space or an ICC profile.

The blending space enables objects of multiple color spaces to blend when interacting transparently. If the PDF does not include transparency groups, choose Leave Unchanged.

Note: *This feature can improve output of legacy PDFs that use transparency but don't specify a page-level blending space, such as PDFs created from non-Adobe applications, or versions of Illustrator older than Creative Suite. These older PDFs depend on the application or printer to choose the blending space.*

5 Specify the pages to convert.

6 Select a conversion option:

Embed Profile As Source Color Space Tags all objects with the destination profile selected in the Profile menu. As an example, a document might contain five objects: one in grayscale and two each in the RGB and CMYK color spaces. In this case, you can embed a separate color profile to calibrate the color for each color space, for a total of three profiles. This might be useful if your RIP performs color management of PDFs or if you are sharing PDFs with other users.

Embed Profile As OutputIntent Uses the destination profile as the output intent. An *output intent* describes the color reproduction characteristics of a possible output device or production environment in which the document will be printed. The color spaces in the document will be DeviceGray, DeviceRGB, or DeviceCMYK, depending on the color model of the destination profile. This destination profile replaces any existing output intent.

Don't Embed Profile Does not tag objects with the profile.

Preserve Black Objects Preserves the color values of objects drawn in CMYK, RGB, or grayscale during conversion. This option prevents text in RGB black from being converted to rich black when converted to CMYK.

Convert object colors

If certain objects in the PDF don't match the color space of the document, you can use the TouchUp Object tool to correct them. Unlike the Convert Colors tool, which changes the color space of all colors in a PDF, the TouchUp Object tool can change the color space of selected objects. For example, if you place an RGB image in a CMYK document, you can use this tool to change only the RGB image and not affect the colors in the rest of the PDF. You can change the color space temporarily or embed the profile with the object.

Note: *The TouchUp Object tool doesn't let you change the output intent, because that affects the entire document.*

1 Choose Tools > Advanced Editing > TouchUp Object tool, and select the objects you want to convert.

2 Right-click/Control-click the selection, and choose Properties.

3 Click the Color tab.

4 From the Convert To menu, choose the profile for specifying the color space of the object. The current color space of a single object (or identical color spaces for multiple objects) appears at the top of the Color tab for reference. Different color spaces for multiple objects aren't shown.

5 From the Rendering Intent menu, choose the translation method appropriate for the object.

6 (Optional) To embed the profile with the object, select Embed Profile.

7 Click Convert Colors.

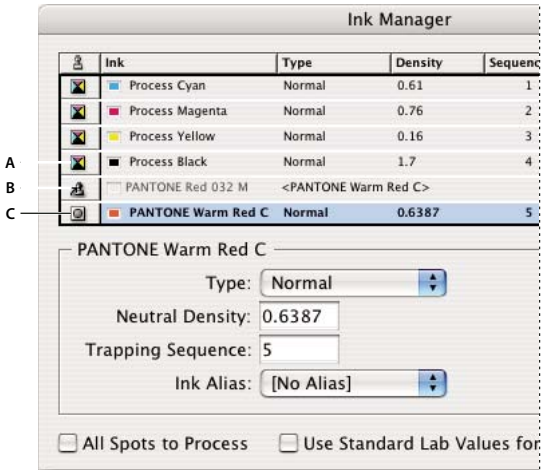
Ink Manager overview

The Ink Manager provides control over inks at output time. Changes you make using the Ink Manager affect the output, not how the colors are defined in the document.

Ink Manager options are especially useful for print service providers. For example, if a process job includes a spot color, a service provider can open the document and change the spot color to the equivalent CMYK process color. If a document contains two similar spot colors when only one is required, or if the same spot color has two different names, a service provider can map the two to a single alias.

In a trapping workflow, the Ink Manager lets you set the ink density for controlling when trapping takes place, and it lets you set the correct number and sequence of inks.

Note: *InDesign and Acrobat share the same Ink Manager technology. However, only InDesign has the Use Standard Lab Values For Spots option.*



Ink Manager
***A.** Process ink **B.** Aliased Spot ink **C.** Spot ink*

Open the Ink Manager in Acrobat

Do one of the following:

- Choose Advanced > Print Production > Ink Manager.
- Select the Ink Manager tool on the Print Production toolbar.
- Choose Advanced > Print Production > Output Preview, and click Ink Manager.
- Choose File > Print, and click Advanced. In the Output panel of the Advanced Print Setup dialog box, click Ink Manager.
- Choose File > Save As, and choose PostScript or Encapsulated PostScript for the file type. Click Settings, and then click Ink Manager.

Open the Ink Manager in InDesign

Do one of the following:

- From the Separations Preview panel menu (Window > Output > Separations Preview), choose Ink Manager.
- Choose File > Print, and click Output. In the Output section, click Ink Manager.

Separate spot colors as process

Using the Ink Manager, you can convert spot colors to process colors. When spot colors are converted to process color equivalents, they are printed as separations rather than on a single plate. Converting a spot color is useful if you've accidentally added a spot color to a process color document, or if the document contains more spot colors than are practical to print.

1 In the Ink Manager, do one of the following:

- To separate individual spot colors, click the ink-type icon to the left of the spot color or aliased spot color. A process color icon appears. To change the color back to spot, click the icon again.
- To separate all spot colors, select Convert All Spots To Process. The icons to the left of the spot colors change to process color icons. To restore the spot colors, deselect Convert All Spots To Process.

Note: *Selecting Convert All Spots To Process removes any ink aliases you've set up in the Ink Manager and can also affect overprinting and trapping settings in the document.*

2 (InDesign only) To use the Lab values of a spot color rather than CMYK definitions, choose Use Standard Lab Values For Spots.

Create an ink alias for a spot color

You can map a spot color to a different spot or process color by creating an alias. An alias is useful if a document contains two similar spot colors when only one is required, or if it contains too many spot colors. You can see the effects of ink aliasing in the printed output, and you see the effects on-screen if Overprint Preview mode is on.

1 In the Ink Manager, select the spot color ink you want to create an alias for.

2 Choose an option in the Ink Alias menu. The ink type icon and ink description change accordingly.

Printer marks, cropping, and hairlines

About printer marks in PDFs

When you prepare a document for print production, a number of marks are needed to help the print service provider align separation films for producing proofs, measure film for correct calibration and ink density, trim film to size, and so on. Printer marks indicate the boundaries of document boxes supported by Adobe PDF, such as trim boxes and bleed boxes.

You can add printer marks temporarily at print time using the Marks And Bleeds panel of the Advanced Print Setup dialog box, or you can embed printer marks in the file (and optionally in a layer) using the Add Printer Marks dialog box. For information about adding printer marks to just the printed output, see "Include marks and bleeds" on page 438.

Note: *A PDF created from Adobe InDesign CS and later can include printer marks, either in a separate layer or on the page. You can view these marks using the Layers tab in Acrobat. If the printer marks were exported as a layer, any printer marks you create using the Acrobat Add Printer Marks feature replace the InDesign printer marks. If the printer marks are not in a layer, Acrobat printer marks overlay InDesign printer marks and might not align.*

Embed printer marks in a PDF

1 Choose Advanced > Print Production > Add Printer Marks, or select the Add Printer Marks tool  on the Print Production toolbar.

2 Specify the pages to mark.

3 Specify the marks and settings.

See also

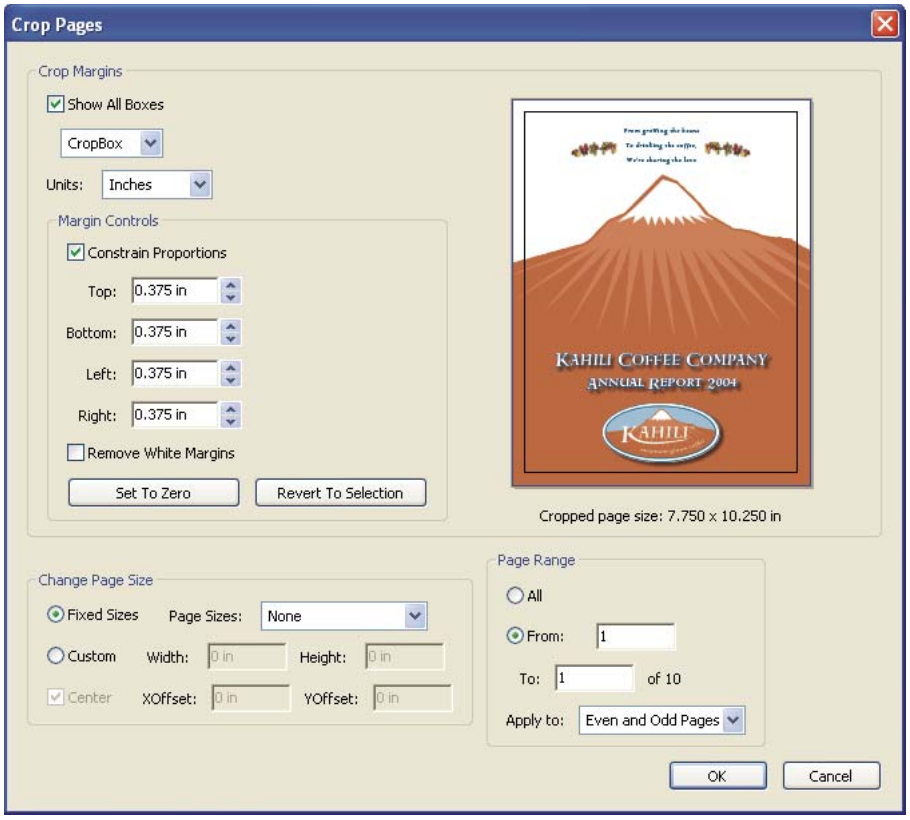
"Include marks and bleeds" on page 438

Crop Pages dialog box overview

Use the Crop Pages dialog box to define boundaries for trim, bleed, and art when preparing your PDF for printing and other output. You can adjust the margins of document boxes supported by Adobe PDF, including the media (page size), trim, bleed, and art boxes. This capability is useful if the printer marks you add using the Add Printer Marks tool (not the Marks And Bleeds panel of the Advanced Print Setup dialog box) would be clipped because the crop box is too small to accommodate the marks. Print service providers can also use this tool to expand the page size for imposition tasks.

You can switch between boxes without losing the margins you set for each. As you adjust individual boxes, the preview in the Crop Pages dialog box is redrawn to reflect the new settings. For example, if you expand the crop or media box, the page content "shrinks" in the preview.

Note: *When the crop box is expanded, the media box adjusts accordingly.*



See also

"Crop pages" on page 133

Display the Crop Pages dialog box

Do any of the following:

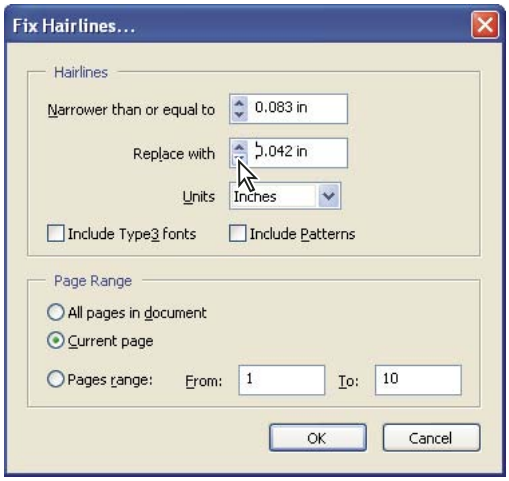
- Choose Advanced > Print Production > Crop Pages.
- Select the Crop Pages tool on the Print Production toolbar.
- Choose Document > Crop Pages.

Fix hairlines

Very thin lines, called *hairlines,* are problematic in offset printing. If left as is in PDFs, they might not appear in the final printed piece. The Fix Hairlines tool can find most hairlines and replace them with a heavier-weight line.

1 Choose Advanced > Print Production > Fix Hairlines, or select the Fix Hairlines tool on the Print Production toolbar.

2 Enter a width for the hairline you want to find, and enter a replacement width.



Adjust hairline widths using increment arrows. Shift-click arrows to change widths by whole integers.

3 Select the unit of measurement from the Units menu.

4 (Optional) Select Include Type3 Fonts or Include Patterns to replace hairlines in Type 3 characters or patterns with the same replacement width as other hairlines.

Font characters and patterns can be used in a variety of contexts in the same document (for example, different magnification values), so changing the line width may produce unexpected results. Check the results if you select these options, and adjust your selections as necessary.

5 Specify the pages to check.

Transparency flattening

About flattening

If your document or artwork contains transparency, to be output it usually needs to undergo a process called *flattening*. Flattening divides transparent artwork into vector-based areas and rasterized areas. As artwork becomes more complex (mixing images, vectors, type, spot colors, overprinting, and so on), so does the flattening and its results.

Flattening may be necessary when you print or when you save or export to other formats that don't support transparency. To retain transparency without flattening when you create PDF files, save your file as Adobe PDF 1.4 (Acrobat 5.0) or later.

You can specify flattening settings and then save and apply them as transparency flattener presets. Transparent objects are flattened according to the settings in the selected flattener preset.

Note: *Transparency flattening cannot be undone after the file is saved.*



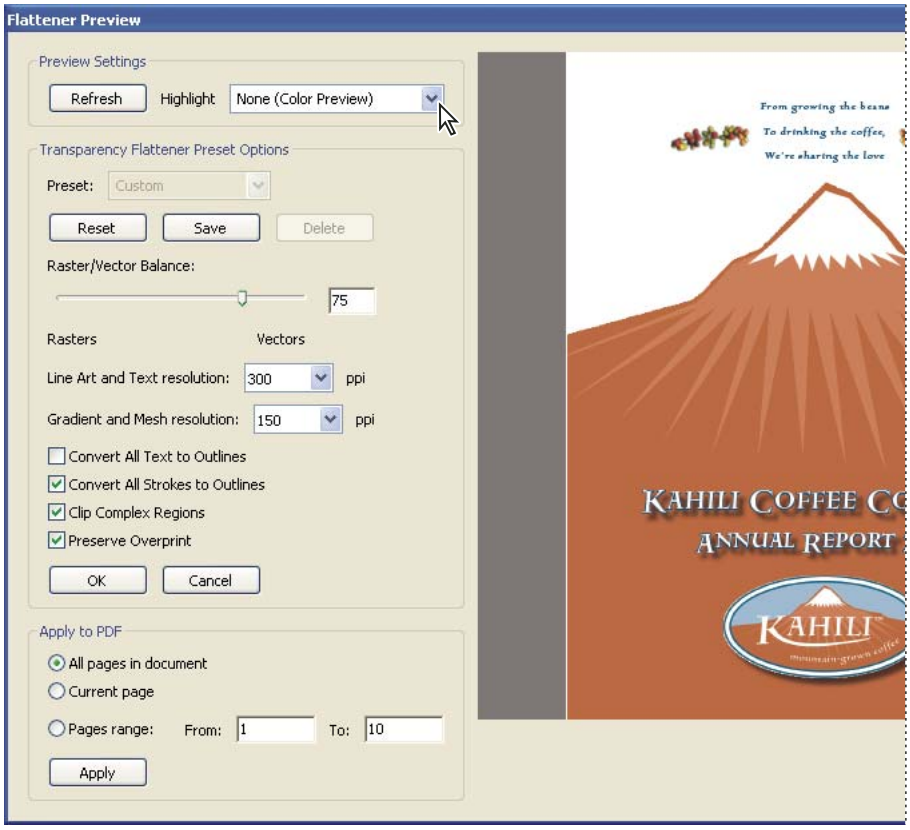
Overlapping art is divided when flattened.

For more information on transparency output issues, see the Print Resource Center on the Adobe website.

Flattener Preview dialog box overview

Use the preview options in the Flattener Preview dialog box to highlight the areas and objects that are transparent, as well as those affected by transparency flattening. Transparent content is highlighted in red, and the rest of the artwork appears in grayscale.

You can use this information to adjust the flattener options before you apply the settings, and then save them as flattener presets. You can then apply these presets from other dialog boxes in the application, including PDF Optimizer, the Advanced Print Setup dialog box, and the Settings dialog box for Save As PostScript.



Flattener Preview dialog box displays a preview of current PDF page using preview and flattener settings.

Open the Flattener Preview dialog box

❖ Choose Advanced > Print Production > Flattener Preview, or select the Flattener Preview button on the Print Production toolbar.

Preview which areas of artwork will be flattened

Use the preview options in the Flattener Preview to highlight areas that are affected by flattening. You can use this color-coded information to adjust flattening options.

Note: *The Flattener Preview is not intended for precise previewing of spot colors, overprints, and blending modes. Instead, use Overprint Preview mode for those purposes.*

1 Display the Flattener Preview palette (or dialog box):

- In Illustrator, choose Window > Flattener Preview.
- In Acrobat, choose Advanced > Print Production > Flattener Preview.
- In InDesign, choose Window > Output > Flattener Preview.

2 From the Highlight menu, choose the kind of areas you want to highlight. The availability of options depends on the content of the artwork.

3 Select the flattening settings you want to use: Either choose a preset or, if available, set specific options.

Note: *(Illustrator) If the flattening settings aren't visible, select Show Options from the palette menu to display them.*

4 If the artwork contains overprinted objects that interact with transparent objects, in Illustrator, select an option from the Overprints menu. You can preserve, simulate, or discard overprints. In Acrobat, choose Preserve Overprint to blend the color of transparent artwork with the background color to create an overprint effect.

5 At any time, click Refresh to display a fresh preview version based on your settings. Depending on the complexity of the artwork, you may need to wait a few seconds for the preview image to appear. In InDesign, you can also choose Auto Refresh Highlight.



In Illustrator and Acrobat, to magnify the preview, click in the preview area. To zoom out, Alt-click/Option-click in the preview area. To pan the preview, hold down the spacebar and drag in the preview area.

See also

"About flattening" on page 465

Transparency Flattener options

You can set Transparency Flattener options when creating, editing, or previewing flattener presets in Illustrator, InDesign, or Acrobat.

Highlight (preview) options

None (Color Preview) Disables previewing.

Rasterized Complex Regions Highlights the areas that will be rasterized for performance reasons (as determined by the Rasters/Vectors slider). Keep in mind that the boundary of the highlight area has a higher probability of producing stitching problems (depending on the printer driver settings and the rasterization resolution). To minimize stitching problems, select Clip Complex Regions.

Transparent Objects Highlights the objects that are sources of transparency, such as objects with partial opacity (including images with alpha channels), objects with blending modes, and objects with opacity masks. In addition, note that styles and effects may contain transparency, and overprinted objects may be treated as sources of transparency if they are involved in transparency or if the overprint needs to be flattened.

All Affected Objects Highlights all objects that are involved in transparency, including transparent objects and objects that are overlapped by transparent objects. The highlighted objects will be affected by the flattening process—their strokes or patterns will be expanded, portions of them may get rasterized, and so on.

Affected Linked EPS Files (Illustrator only) Highlights all linked EPS files that are affected by transparency.

Affected Graphics (InDesign only) Highlights all placed content affected by transparency or transparency effects. This option is useful for service providers who need to see graphics that require attention to print properly.

Expanded Patterns (Illustrator and Acrobat) Highlights all patterns that will be expanded if involved in transparency.

Outlined Strokes Highlights all strokes that will be outlined if involved in transparency or because Convert All Strokes To Outlines is selected.

Outlined Text (Illustrator and InDesign) Highlights all text that will be outlined if involved in transparency or because Convert All Text To Outlines is selected.

Note: *In the final output, outlined strokes and text may appear slightly different from native ones, especially very thin strokes and very small text. However, the Flattener Preview doesn't highlight this altered appearance.*

Raster-Fill Text And Strokes (InDesign only) Highlights text and strokes that have rasterized fills as a result of flattening.

All Rasterized Regions (Illustrator and InDesign) Highlights objects and intersections of objects that will be rasterized because there is no other way of representing them in PostScript or because they are more complex than the threshold specified by the Rasters/Vectors slider. For example, the intersection of two transparent gradients will always be rasterized, even if the Rasters/Vectors value is 100. The All Rasterized Regions option also shows raster graphics (such as Photoshop files) involved in transparency, and raster effects such as drop shadows and feathers. Note that this option takes longer to process than the others.

Transparency Flattener Preset options

Name/Preset Specifies the name of the preset. Depending on the dialog box, you can type a name in the Name text box or accept the default. You can enter the name of an existing preset to edit that preset. However, you can't edit the default presets.

Raster/Vector balance Specifies the amount of vector information that will be preserved. Higher settings preserve more vector objects, while lower settings rasterize more vector objects; intermediate settings preserve simple areas in vector form and rasterize complex ones. Select the lowest setting to rasterize all the artwork.

Note: *The amount of rasterization that occurs depends on the complexity of the page and the types of overlapping objects.*

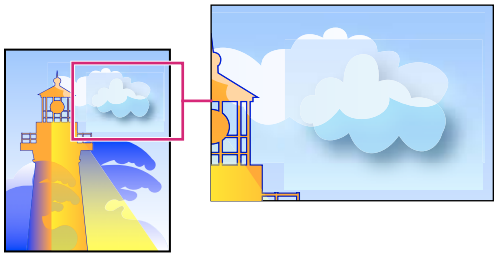
Line Art And Text Resolution Rasterizes all objects, including images, vector artwork, text, and gradients, to the specified resolution. Acrobat and InDesign allow a maximum of 9600 pixels per inch (ppi) for line art, and 1200 ppi for gradient mesh. Illustrator allows a maximum of 9600 ppi for both line art and gradient mesh. The resolution affects the precision of intersections when flattened. Line Art and Text Resolution should generally be set to 600-1200 to provide high-quality rasterization, especially on serif or small point sized type

Gradient And Mesh Resolution Specifies the resolution for gradients and Illustrator mesh objects rasterized as a result of flattening, from 72 to 2400 ppi. The resolution affects the precision of intersections when flattened. Gradient and mesh resolution should generally be set between 150 and 300 ppi, because the quality of the gradients, drop shadows, and feathers will not improve with higher resolutions, but printing time and file size will increase.

Convert All Text To Outlines Converts all type objects (point type, area type, and path type) to outlines and discards all type glyph information on pages containing transparency. This option ensures that the width of text stays consistent during flattening. Note that enabling this option will cause small fonts to appear slightly thicker when viewed in Acrobat or printed on low-resolution desktop printers. It doesn't affect the quality of the type printed on high-resolution printers or imagesetters.

Convert All Strokes To Outlines Converts all strokes to simple filled paths on pages containing transparency. This option ensures that the width of strokes stays consistent during flattening. Note that enabling this option causes thin strokes to appear slightly thicker and may degrade flattening performance.

Clip Complex Regions Ensures that the boundaries between vector artwork and rasterized artwork fall along object paths. This option reduces stitching artifacts that result when part of an object is rasterized while another part of the object remains in vector form. However, selecting this option may result in paths that are too complex for the printer to handle.



Stitching, where rasters and vectors meet

Note: *Some print drivers process raster and vector art differently, sometimes resulting in color stitching. You may be able to minimize stitching problems by disabling some printer-driver-specific color-management settings. These settings vary with each printer, so see the documentation that came with your printer for details.*

(Illustrator only) Select Preserve Alpha Transparency (Flatten Transparency dialog box only) Preserves the overall opacity of flattened objects. With this option, as when you rasterize artwork using a transparent background, blending modes and overprints are lost but their appearance is retained within the processed artwork, along with the level of alpha transparency. Preserve Alpha Transparency can be useful if you are exporting to SWF or SVG, since both of these formats support alpha transparency.

(Illustrator only) Select Preserve Spot Colors And Overprints (Flatten Transparency dialog box only) Generally preserves spot colors. It also preserves overprinting for objects that aren't involved in transparency. Select this option when printing separations if the document contains spot colors and overprinted objects. Deselect this option when saving files for use in page-layout applications. With this option selected, overprinted areas that interact with transparency are flattened, while overprinting in other areas is preserved. The results are unpredictable when the file is output from a page-layout application.

Preserve Overprint (Acrobat only) Blends the color of transparent artwork with the background color to create an overprint effect.

About transparency flattener presets

If you regularly print or export documents that contain transparency, you can automate the flattening process by saving flattening settings in a *transparency flattener preset*. You can then apply these settings for print output as well as for saving and exporting files to PDF 1.3 (Acrobat 4.0) and EPS and PostScript formats. In addition, in Illustrator you can apply them when saving files to earlier versions of Illustrator or when copying to the clipboard; in InDesign you can also apply them when exporting to SVG format; in Acrobat, you can also apply them when optimizing PDFs.

These settings also control how flattening occurs when you export to formats that don't support transparency.

You can choose a flattener preset in the Advanced panel of the Print dialog box or of the format-specific dialog box that appears after the initial Export or Save As dialog box. You can create your own flattener presets or choose from the default options provided with the software. The settings of each of these defaults are designed to match the quality and speed of the flattening with an appropriate resolution for rasterized transparent areas, depending on the document's intended use:

[High Resolution] For final press output and for high-quality proofs, such as separations-based color proofs.

[Medium Resolution] For desktop proofs and print-on-demand documents that will be printed on PostScript color printers.

[Low Resolution] For quick proofs that will be printed on black-and-white desktop printers and for documents that will be published on the web or exported to SVG.

Create a flattener preset

You can save transparency flattener presets in a separate file, making it easy to back them up or to make them available to service providers, clients, or others in your workgroup. Once you create a custom flattener preset, you can edit it in PDF Optimizer.

Flattener presets are stored in the same location as printer settings files:

(Windows) \Documents and Settings\[*current user*]\Application Data\Adobe\Acrobat\8.0\Preferences

(Mac OS) Users/[*current user*]/Library/Preferences/Acrobat/8.0

Note: *Flattener presets created in Acrobat have a different file format from those created in other Adobe applications, so you cannot share them between applications.*

1 Choose Advanced > Print Production > Flattener Preview, or select the Flattener Preview button on the Print Production toolbar.

2 To base a preset on an existing one, select it from the Preset menu.

3 Set flattening options.

4 If necessary, click Reset to return to the original settings.

5 Click Save.

6 Type a name and click OK.

Note: *To delete a custom preset, choose it from the Preset menu and press Delete.*

See also

"Transparency Flattener options" on page 468

Apply a flattener preset

❖ Do one of the following:

- In the Flattener Preview dialog box, choose a preset from the menu, specify a page range, and click Apply.
- In the PDF Optimizer, select Transparency on the left, and then select a preset from the list.
- In the Advanced Print Setup dialog box, select the Output panel on the left, and then select a preset from the Transparency Flattener Preset menu.
- Choose File > Save As, choose a PostScript file format (EPS or PS), and click Settings. In the Output panel, select a preset from the Transparency Flattener Preset menu.

Edit a flattener preset in the PDF Optimizer

You can modify custom presets only.

1 Choose Advanced > Print Production > PDF Optimizer.

2 Select Transparency on the left.

3 Double-click the custom preset you want to edit, modify the settings, and click OK.

Chapter 17: Preflight

To verify that your Adobe PDF contains only the features, fonts, and formatting that you've specified, use the Preflight tool to inspect and, in certain cases, correct the document's contents.

Quickstart

The following topics provide overview steps for some common preflight tasks.

Preflight PDFs

Use the Preflight tool to determine a document's validity for print production or other conditions. When you preflight a document, you validate that the document contains only specific features, fonts, and formatting.

1 Choose Advanced > Preflight.

2 Select a profile from the list. To correct errors, select a profile that includes a fixup. These are denoted by a wrench icon next to the profile.

3 Click Execute.

Results appear in the Preflight dialog box.

See also

"Analyzing documents for print readiness" on page 473

Add fixups to a profile

Adding a fixup to a profile allows you to fix errors identified during a preflight inspection.

1 Choose Advanced > Preflight, and click Edit.

2 Select the desired profile, and then choose Unlock from the pop-up menu at the top of the dialog box.

3 Select Fixups from the list under the profile.

4 Select the desired fixup in the right column and click the left arrow .

You can add multiple fixups covering different areas to a profile.

See also

"Add fixups to a profile" on page 493

Create a PDF/X-compliant file

You can validate PDF content using PDF/X criteria, and then save the PDF as a PDF/X-compliant file.

1 Choose Advanced > Preflight.

2 Choose Options > Convert Current PDF To PDF/X.

3 Select PDF/X-1a, PDF/X-3, or PDF/X-4, and specify other conversion options.

4 If the conversion succeeds, save the PDF. If it fails, view the results.

Preflight cannot modify conditions that make the conversion invalid. It provides only a list of those conditions.

See also

"Convert PDFs to PDF/X or PDF/A" on page 497

Analyzing documents for print readiness

About preflight inspections

The Preflight tool analyzes the contents of a PDF to determine its validity for print production and a variety of other conditions that you can specify. Preflight inspects the file against a set of user-defined values, called *preflight profiles*. Depending on the profile, the preflight inspection can also correct certain errors. Preflight lists the results in the Preflight dialog box and in the optional reports.

Preflight identifies issues with colors, fonts, transparency, image resolution, PDF version compatibility, and more. Preflight also includes tools for examining PDF syntax or the actual PDF structure of a document.

Before you use the Preflight tool or create a PDF for print, follow these recommendations:

- If you created PDFs using Acrobat Distiller, InDesign, or Illustrator, optimize them for print or press using the predefined settings in Distiller or InDesign PDF styles, or using settings provided by your print service provider.
- Use CMYK or DeviceN (the Adobe PostScript 3 color space for representing common elements such as duotones, tritones, and quadtones) in a four-color process job.
- Embed all fonts from within the authoring application. Embedding ensures that fonts aren't substituted.

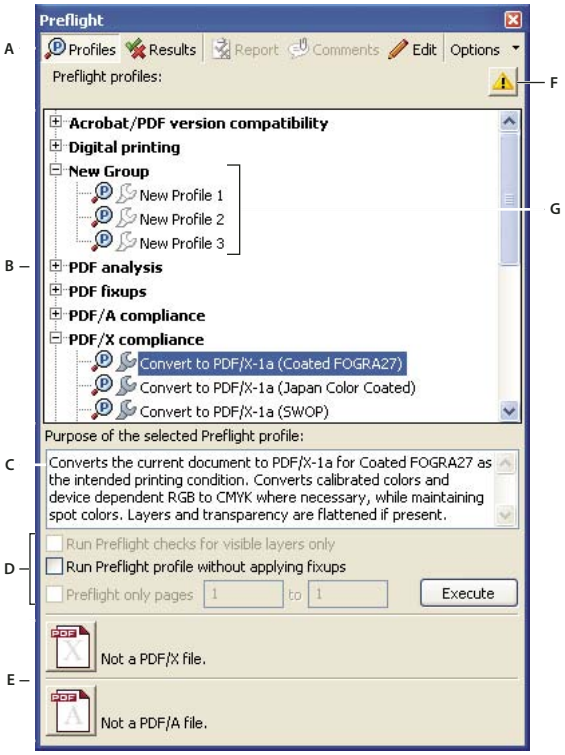
See also

"Choose an Adobe PDF preset for converting files" on page 99

"Accessing and embedding fonts using Distiller" on page 113

About the Preflight dialog box

Use the Preflight dialog box to control all aspects of the preflight inspection. This box is available from the Advanced menu (Advanced > Preflight or Advanced > Print Production > Preflight) when you have a PDF open. You can also select the Preflight tool from the Print Production toolbar.



Preflight dialog box
***A.** Commands **B.** Preflight profiles **C.** Profile description **D.** Preflight options **E.** PDF/X and PDF/A status **F.** Display Settings Alert **G.** Groups*

Run a preflight inspection

You can use or modify an existing profile, or create your own.

1 Open the PDF and select Advanced > Preflight.

2 If the Warning icon appears in the upper right of the Preflight dialog box, click it to see potential problems in viewing the PDF. These might include overprinting elements, or the influence of color management with or without an embedded output intent. Click Adjust to resolve the conflict, or just close the dialog box.

3 Select a profile from the list.

Profiles are organized in groups that you can expand and collapse. Profiles with the gray wrench icon include fixups that can correct errors in your file. The text beneath the profile name describes the profile's purpose.

***Important:** Fixups permanently change the PDF. If you execute a fixup and want to undo the changes, choose Edit > Undo immediately. You will not be prompted to save fixups.*

4 For the options with check boxes, do any of the following:

- Specify a page range for the inspection.
- Specify whether to limit the inspection to visible layers. Selecting this option disables any fixups.
- Run the inspection without fixing errors. Select this option if you want to view errors without changing the PDF.

5 Click Execute, or choose Execute Preflight Profile from the Options menu. When the inspection is finished, the results appear in the Preflight dialog box. If you get a message that fixups are disabled, make sure that you have not selected Run Preflight Checks For Visible Layers Only.



You can also double-click a profile in the list to run the preflight inspection.

See also

"About preflight profiles" on page 483

"Convert PDFs to PDF/X or PDF/A" on page 497

Preflight preferences

Use the Preflight Preferences dialog box to control how results are reported and to specify output intents when creating PDF/X files. A PDF may have an embedded output intent containing an ICC profile. You can copy this profile to your computer and use it just as you would any other ICC profile.

Open the Preflight Preferences dialog box by choosing Options > Preflight Preferences. You can then use the tabs to set the preferences you want.

See also

"Create output intents" on page 501

General tab

The General tab includes options for specifying how dialog box elements and preflight results are displayed:

Maximum Number Of Results To Be Displayed Per Type Of Check Specifies how many instances of a mismatch appear in the Results list. Use the Per Page (Under "Further Matches") option to nest additional results under the Further Matches section in the Results list.

Degree Of Detail When Displaying Results Specifies how much detail appears in the Preflight Results list. You can specify no details, only important details, or all details. For example, suppose you select Show List Of Results With Most Important Details, and you select the profile "List all objects not 4c." If your document includes five RGB images, then for each image, one single line entry will be included in the results, indicating such things as size, resolution, and color space.

Output intent options

You can set the following options on the Output Intents tab of the Preflight Preferences dialog box. For more information on using output intents, see "Output intents" on page 500.

Name The name of the output intent.

Output Intent Profile (ICC Profile) The ICC profile that describes the characterized printing condition for which the document has been prepared and that is required for PDF/X-compliance. Click Browse to select one from the default Profiles folder.

Output Condition Identifier The reference name specified by the ICC registry of registered standard printing conditions. Choose from the list of output conditions—the description appears in the Output Condition box—or choose Custom and create your own.

Registry The URL giving more information about the output intent profile name. For the standard printing conditions registered with the ICC, this entry must be **http://www.color.org/**.

Output Condition A description of the intended printing condition of the job, including type of printing (for example, offset commercial), paper type, and screen frequency. You can modify this description for output conditions you edit or create from scratch.

Locked This option is a safeguard against accidental modification of the output intent. All the text fields are dimmed.

Highlighting tab

The Highlighting tab includes options for identifying problem objects on a PDF page. The Highlighting preferences control both the appearance of masks in mask reports and the appearance of lines on-screen when you double-click Highlighting in the Preflight Results window. You set highlighting properties for each type of alert: Error, Warning, and Info.

Color/Opacity Click Color to choose colors from a color spectrum. Specify the opacity of the color.

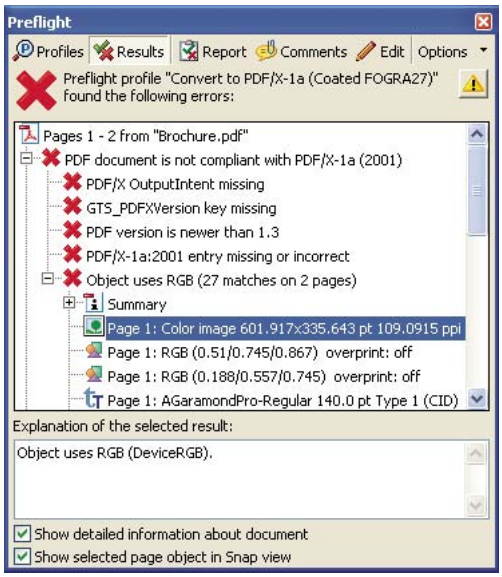
Draw Border For Bounding Box Draws the same lines in a mask report that you see on-screen when you double-click a result in the Preflight Results window. This is useful for identifying objects in a mask report when an image occupies the entire page. In this case you won't see the mask, but you will see the lines around objects.

Line Style/Thickness Click Line Style to select the line pattern (lines, dots, or dashes). Specify the line width (thickness).

Viewing preflight results, objects, and resources

About preflight results

You can view the results of a preflight inspection as a list, as comments, or individually in the Preflight dialog box. In the Results list, mismatches appear according to their severity, with all errors first, followed by warnings, and then just information. An alert icon appears next to each check that did not meet the criteria specified in the preflight profile.



Preflight dialog box with problem objects

The icons at the top of the Preflight dialog box indicate that at least one issue of a particular severity has been found: the red error icon, the yellow warning icon, and the blue Info icon for information only (with no errors or warnings). The green check mark means that no problems were found.

See also

"Preflight alert options" on page 488

View results in a list

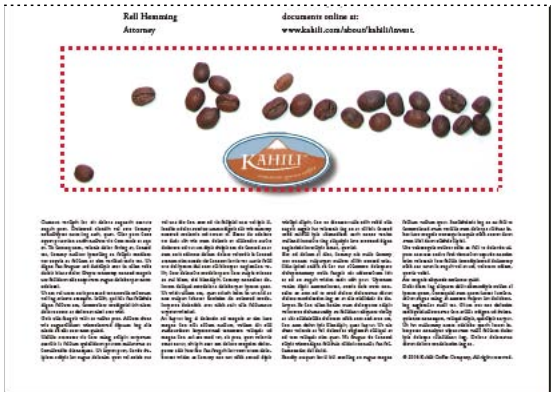
The Preflight dialog box lists the issues flagged after an inspection that tests against the criteria specified in the selected profile.

1 Run a preflight inspection.

2 When the results appear, do any of the following:

- If details are available, expand an area to see details about the problem object. Only the first few problems are listed. Your Preflight preferences determine how additional results, if any, are listed.
- To see more information, select Show Detailed Information About Document at the bottom of the dialog box.
- To see an object in a separate view, select Show Selected Page Object In Snap View.
- If you switched to a different view in the Preflight dialog box, such as the Profiles list, you can get back to the Results list by clicking the Results button at the top of the dialog box, or choosing Show Most Recent Results from the Options menu.
- To see an object in context on the PDF page, double-click the item. The object is highlighted with a dotted line for easier identification. This is useful when an object such as a font exists in multiple places in the document. In some cases, the item is an attribute of an object (for example, a color space). In those cases, the inspection finds the objects that use the attribute.

You can change the type of line, its thickness, and its color on the Highlighting tab of Preflight preferences.



Problem object on the PDF page

See also

"Preflight preferences" on page 475

"Run a preflight inspection" on page 474

Use Snap View to view a problem object

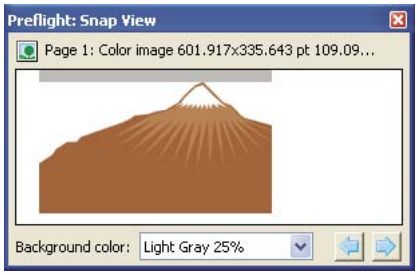
Use Snap View to isolate an item when you're working with pages containing complex, overlapping areas. Some items, such as document information fields or page labels, cannot be displayed.

1 Expand an area to display the problem objects found during the inspection.

2 Select a problem object in the list.

3 Select Show Selected Page Object In Snap View.

4 In the Preflight Snap View window, choose an option from the Background Color menu. All problem objects are displayed on this color in Snap View.



Snap view of problem object

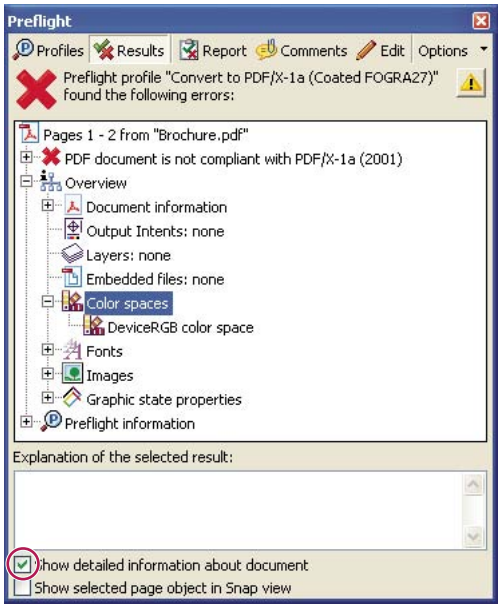
View resources and general information

The Overview section of the Preflight dialog box lists all types of properties and resources for the document, including the color spaces, fonts, patterns, halftone settings, graphic states, and images used. It also lists general information about the analyzed document, such as the application used to create it, the date it was created, and the date it was last modified. The document information also indicates whether the PDF contains notes, forms, hypertext links, metadata, or similar items.

1 In the Preflight dialog box with results showing, select Show Detailed Information About Document. Overview and preflight information appear.

2 Expand the Overview and Preflight Information sections to view details.

3 In the Overview section, expand a property to list the document's resources.



Document resources, including color spaces, fonts, and images found in problem objects

See also

"About additional checks and properties" on page 488

View results as comments

You can embed preflight results as comments in the PDF and then view them as you would any PDF comments. For example, you can click Comments in the navigation pane to list each comment (or filtered comment) in a list.

See also

"View comments" on page 181

Insert and view preflight comments

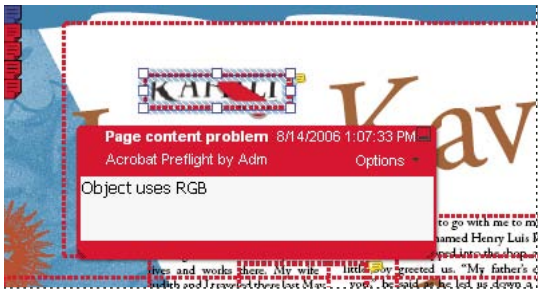
1 In the Preflight dialog box, click Comments, or choose Insert Preflight Results As Comments from the Options menu.

Each problem object is highlighted using the border style specified in Preflight preferences.

You can change the type of line, its thickness, and color on the Highlighting tab of Preflight preferences.

2 If prompted, click Embed if you want to embed comments, regardless of how many exist.

3 In the PDF, hold the pointer over a comment to view its contents.



Sample PDF report with a sticky note

Remove preflight comments

❖ In the Preflight dialog box, choose Remove Preflight Comments from the Options menu.

Preflight reports

Create a results report

You can capture the results of a preflight inspection in various types of reports. You can capture the results in a text file, an XML file, or a single PDF file. A PDF report can include just an overview, or detailed information presented in different ways.

A PDF report includes information about the document and problem objects in layers, which you turn on or off in the Layers panel of the navigation pane.

Note: *You can also create an inventory of all objects and resources used in the PDF.*

Create a report of preflight results

1. In the Preflight dialog box, click Report, or choose Create Report from the Options menu.
2. Specify a name and location for the report. The suffix "_report" is automatically added to the report name.
3. Select the type of report and click Save.

Report types

PDF Report Creates a summary of problems accompanied by details that are shown using transparent masks, comments, or layers for each problem object.

- **Overview** Condenses the preflight results into a short document that includes applied fixups, a results summary, and document information.

- **Details** Reports additional information about each problem object—for example, where the object is located on the page. Problems Highlighted By Transparent Masks places a colored mask, similar to a Photoshop mask, over areas to make the problem areas stand out. You can change the mask color using Preflight preferences. Problems Highlighted By Comments inserts preflight results as comments. Problems Highlighted By Layers shows the file

separated into layers of mismatches or found objects according to the criteria used in the profile itself. Another layer called Other Objects includes objects that have nothing to do with the profile used.

XML Report Produces a structured report for workflow systems that can interpret and process the preflight results. For details, contact your print service provider.

Text Report Produces a report in plain text format, with each line indented according to the hierarchy in the Preflight Results dialog box. You can open the report in a text editor.

Hide or show layers in a PDF report

1 In the navigation pane, click the Layers button to open the Layers panel.

2 In the Layers panel, expand the report and click the square to the left of a layer name to hide or show the layer.

About inventory reports

An *inventory report* shows resources used in a PDF, including color spaces, images, patterns, shadings, metadata, and fonts and glyphs in each font family. Related information is grouped together and arranged on a PDF page so that you can scan and locate items. You can run an inventory report before or after you run a preflight inspection. Unlike a preflight results report, which provides only the information requested by checks in the selected profile, an inventory report does not filter the PDF content. Together, a preflight inspection report and an inventory report can help you identify and fix problems.

The information in an inventory report can be useful when you perform tasks such as these:

- Exploring files that seem unusual, such as those created by an unknown application, or files with slow screen redraw or copy-and-paste actions that don't work.
- Examining processing issues, such as failure to print correctly, or problems encountered during color conversion, imposition, placement on an InDesign page, and so on.
- Identifying aspects of a PDF that are not ideal, such as the inadvertent embedding of a font because of an unnoticed space character on a master page, or cropped images with extraneous image data, or objects that are not of the expected type (such as type or vector objects converted to images or merged with an image).
- Providing additional information about an object besides its presence. For example, by locating a spot color in the inventory report, you can determine whether it is used by itself or in combination with other colorants, such as in a duotone image. Or you can determine which glyphs in a font are embedded, what they look like, and which character they are supposed to represent. This information can help you resolve a missing-glyph error.
- Exploring *XMP metadata* embedded with the file, such as its author, resolution, color space, copyright, and keywords applied to it. This information is stored in a standardized way using the Extensible Metadata Platform (XMP) standard.

Create an inventory of PDF content

1 In the Preflight dialog box, choose Create Inventory from the Options menu.

2 Select the types of objects and resources you want included in the inventory. In addition to fonts, colors, images, and so on, you can include the following information:

Form XObjects Objects that are referenced within a PDF. For example, if a PDF contains many occurrences of the same object, it exists as a single resource that is referenced many times.

Include XMP Metadata Includes information embedded in the PDF that can be used by an XMP-enabled application or device in the workflow. This information can include meaningful descriptions and titles, searchable keywords, the

author's name, and copyright information. If you select Include Advanced Fields, you can include the fields and structures used for storing the metadata using namespaces and properties. This advanced information appears as a text-based tree view of all the XMP data in the PDF, both for the document as well as for those images in the PDF for which XMP metadata is present.

Note: *You can also view the metadata for the PDF document as a whole in the Document Properties dialog box. Choose File > Properties, click the Description tab, and then click Additional Metadata. To see the advanced fields, click Advanced from the list on the left.*

3 (Optional) Save the report.

Advanced inspections

Viewing preflight problems inside the PDF structure

If you have advanced knowledge of the PDF file format, you may want to explore the technical reasons for a preflight mismatch by examining the internal structure of the PDF and its fonts. Preflight includes three options for in-depth inspection of a PDF. Technically skilled users can use these tools to analyze the objects and fonts that caused a mismatch.

For detailed information on PDF structure, refer to *PDF Reference Fifth Edition: Adobe Portable Document Format Version 1.6*(English only) on the Adobe website. You should also have intimate knowledge of font internal structures, or have font specifications for Type 1, TrueType, and OpenType fonts at hand. The font specifications are listed in the bibliography of the guide.

Note: *You can navigate the PDF and fonts in the windows that appear, but you can't edit the PDF structure or fonts.*

Browse the internal PDF structure

View the structure of a PDF, as defined by content streams and cos objects, in a tree array. (*Content streams* represent pages, form XObjects, Type 3 font characters, and the appearance of comments and form fields. *Cos objects* include such items as color space, images, and XObjects.)

Check PDF syntax, view the results of a fixup, or determine the cause of a mismatch. Choose between five view modes that organize content streams in different ways. You cannot edit the PDF in the Internal PDF Structure window.

Note: *Do not confuse the internal structure with the logical structure in tagged PDFs that improves accessibility for low- or non-sighted readers. The internal structure is a superset of all objects in the document, including tags.*

Before you can browse the internal PDF structure, you must run a preflight check.

1 In the Preflight window, choose Browse Internal Structure from the Options menu.

The Internal PDF Structure window opens, showing a tree view of the document information and the document catalog (the root of the document's object hierarchy).

2 Expand each tree item to view the document structure.

3 Click the Page button to view the structure of each page.

4 To change how content streams appear in the tree view, select a view mode in the toolbar:

Classic Displays the content stream as a sequence of page content operators. Expand the subtree for an operator to view its operands. This is the default view.

Q Groups all operators in the content stream that belong to the same graphic state nesting level within a pair of the q/Q operators. Expand the subtree for a q/Q pair to view the operator and parameters inside.

BMC Similar to Q, but arranges content streams by marked content (BMC/EMC) nesting levels.

BT/ET Arranges content streams by text blocks, which are enclosed by BT and ET operators.

Snippet Displays content streams as a series of snippets. A *snippet* is a contiguous group of objects that share the same graphic state. In this view, each snippet represents a type of drawing operation (for example, paint area) and its graphic state.

You can also view content streams as snippets by selecting Show Selected Page Object In Snap View in the Preflight window.

Browse the internal font structure

View the internal structure of embedded fonts in a PDF in greater detail than the preflight results with a graphical view that shows the outline and coordinates of each glyph. You can determine the source of various preflight problems, such as mismatches caused by inconsistent glyph widths.

Before you can browse the internal font structure, you must run a preflight check.

1 In the Preflight window, choose Browse Internal Structure Of All Document Fonts from the Options menu.

To view the structure of a single font, expand the Fonts entry in the results, select a font, and choose Browse Internal Font Structure from the Options menu.

2 To view the glyph details, click any of the following buttons:

Display Grid Shows the origin of the glyph's coordinate space, indicated by two green-colored orthogonal lines.

Display Boxes Shows the area used by the selected glyph and the maximum area used by all glyphs using blue lines that coincide on the top and bottom.

Display Filling Shows the areas of a filled glyph as medium gray.

Display Points Shows all the points used to define the glyph's outline. Black points indicate the outline's contour. Red points indicate bezier curves and are offset from the outline's contour.

Display Cursor Shows the position of the currently selected point, indicated by two magenta-colored orthogonal lines. This button is available only if Display Points is selected.

3 To adjust the size of the glyph display area, drag the handle between the tree view and the glyph display area up or down.

Preflight profiles

About preflight profiles

The success of a preflight inspection depends on how well you define the criteria for the inspection. The inspection criteria are packaged in a file called a *preflight profile*. A preflight profile includes one or more checks; each check includes one or more property statements that validate the PDF content. Preflight shows an error only if all the property statements in the check are in error. In the Preflight Edit Profile dialog box, you can specify which values to use and how to handle mismatches. For example, you can choose a profile that simply reports mismatches, or one that automatically fixes a mismatch according to its specified parameters. A profile with a fixup has the gray wrench icon next to it.

Adobe Acrobat includes several predefined preflight profiles, organized into groups, such as Digital Printing, PDF Analysis, Prepress, and PDF/A or PDF/X Compliance. You can use the predefined profiles as is or modify them to create custom profiles. The *checks* that make up the profiles (called *rules* in previous versions of Acrobat) are organized by categories, such as Document, Pages, Images, and so on. Each check in a category governs a particular document property.

To help you determine what document properties the preflight profile analyzes—and thus how to set parameters—you can review information about each selected check in the Preflight Edit Profile dialog box. This information describes what criteria the check uses to analyze, and possibly fix, a document property.

See also

"About additional checks and properties" on page 488

View profiles

1 Do one of the following:

- If the Preflight dialog box is not open, choose Advanced > Preflight.
- If the Results list or another panel is displayed in the Preflight dialog box, click the Profiles button at the top of the Preflight dialog box, or choose Show Preflight Profiles from the Options menu.

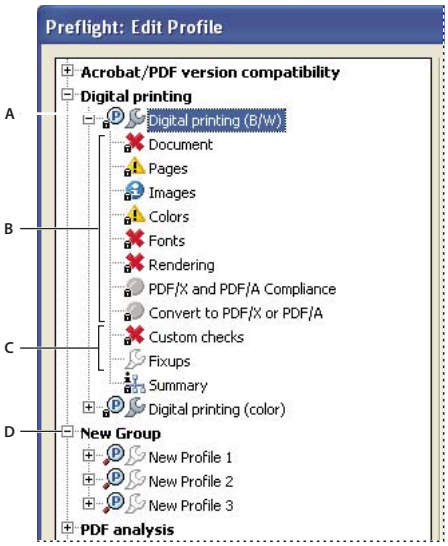
2 Expand the profile groups as desired.

The list includes all predefined profiles, and any custom profiles you've created.

Preflight Edit Profile dialog box overview

The Preflight Edit Profile dialog box lists all available profiles and shows which document properties are being analyzed. From this dialog box you can unlock and lock a profile, create a new group for organizing profiles, and specify inspection criteria. You can access additional options and information by expanding the profile.

To open the Preflight Edit Profile dialog box, expand a profile group in the Preflight dialog box, select a profile, and click Edit (or choose Edit Preflight Profiles from the Options menu).



Preflight Edit Profile dialog box
A. *Profile* ***B.*** *Predefined set of checks* ***C.*** *More options* ***D.*** *Profiles groups*

Add and remove profiles

You can create your own custom preflight profiles. Before you create a new profile from scratch, review existing profiles for ones that achieve results similar to those you want. If possible, duplicate an existing profile and modify only the relevant portion.

A preflight profile must contain at least one check and one property that validate the PDF content. When you build a check from scratch, you can use existing properties or create new properties as you go. For best results when creating and modifying profiles, add only as many checks as you need to validate the PDF content, and keep the checks and properties simple and straightforward. For example, you can use a PDF/X profile to check for certain criteria, and then add checks for non-PDF/X criteria, such as image resolution.

See also

"Add checks to a profile" on page 491

"Create or modify custom checks" on page 492

"Add fixups to a profile" on page 493

"Create or modify fixups" on page 496

Create a new profile

1 In the Preflight Edit Profile dialog box, do one of the following:

- Click the Create icon .
- To base the new profile on an existing one, select a profile and click the Duplicate icon .

2 Type a name and purpose for the new profile, assign it to a group, and specify other options as desired.

By default, newly created profiles appear under the Custom Profiles group, unless you assigned them to a different group.

3 Expand the profile in the column on the left.

4 Modify checks (as provided).

5 Add additional checks and fixups.

Create a profile group

1 In the Preflight Edit Profile dialog box, choose New Group from the Group menu.

2 Type a name for the group and click OK.

Remove a profile

❖ In the Preflight Edit Profile dialog box, select the profile and click Delete .

Import or export preflight profiles

Preflight profiles can be shared with other users. For example, print service providers can provide them to their customers to ensure that jobs pass an inspection defined by those profiles before the jobs are handed off. Users in a workgroup can create their own profiles as a way to check a document before uploading to the web or printing to a special printer, or to check in-house production.

To exchange a profile, you package it for import and export. The package includes all checks and properties for the selected profile.

Import a preflight profile

1 Do one of the following:

- In the Preflight dialog box, choose Import Preflight Profile from the Options menu.
- In the Preflight Edit Profile dialog box, click the Import icon .

2 Locate the preflight package file (.kfp extension), and click Open. The profile appears in the Profiles list under the Imported Profiles group.

3 If the profile is locked, choose Unlocked from the pop-up menu in the Preflight Edit Profile dialog box.

4 If prompted, enter the password.

Double-clicking a profile on your computer, or dragging profiles to the Acrobat window or Acrobat application icon installs them in the correct place on your computer.

The profile can be edited.

Export a preflight profile

1 To lock the profile before you export it, choose Locked from the pop-up menu in the Preflight Edit Profile dialog box. You can also select Password Protected and enter a password.

2 Do one of the following:

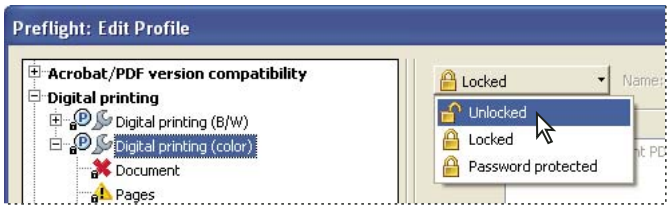
- In the Preflight dialog box, choose Export Preflight Profile from the Options menu.
- In the Preflight Edit Profile dialog box, click the Export icon .

3 Specify a name and location for the package, and click Save.

To export a profile from the Preflight dialog box, select the profile and choose Export Preflight Profile from the Options menu.

Lock, unlock, and password-protect profiles

You can prevent unauthorized changes to preflight profiles by locking profiles and giving them passwords. This may be useful if preflight profiles are shared among several users. You can lock or password-protect preflight profiles when you first create them or any time you save the preflight profiles. By default, all predefined preflight profiles are locked.



Unlocking a locked preflight profile

Lock a profile

1 In the Preflight Edit Profile dialog box, select a profile.

2 Choose Locked from the pop-up menu at the upper left of the dialog box.

The options become unavailable.

Password protect a profile

1 In the Preflight Edit Profile dialog box, select a profile.

2 Choose Password Protected from the pop-up menu at the upper left of the dialog box.

3 Type and reenter the password, and click OK. You can use uppercase and lowercase letters, numerals, or punctuation marks.

The options become unavailable.

Unlock or unprotect a profile

1 In the Preflight Edit Profile dialog box, select a profile.

2 Choose Unlocked from the pop-up menu at the upper left of the dialog box.

3 If prompted, enter the correct password, and click OK.

Change profile settings

You can change the settings of a single profile.

See also

"Preflight Edit Profile dialog box overview" on page 484

"Lock, unlock, and password-protect profiles" on page 486

"Add and remove profiles" on page 485

Change general profile settings

1 Open the Preflight Edit Profile dialog box.

2 Expand the profile group and select a profile.

3 If the profile is locked, choose Unlocked from the pop-up menu.

4 Change any of the following settings:

- Enter a new name for the profile, and describe it in the Purpose box.
- To apply password protection to the profile, select Password Protected from the pop-up menu. When prompted, type and reenter the password, and click OK. Otherwise, choose Unlocked.
- Enter your name and email address.
- Assign the profile to a group. Select an existing group from the menu, or select New Group, type a name, and click OK. Groups are sorted alphabetically.

5 When you finish editing a password-protected profile, select Locked from the pop-up menu. You may also want to password-protect it again.

6 Click OK, or click Save to save your changes without closing the dialog box.

Modify existing check and alert settings

1 Open the Preflight Edit Profile dialog box.

2 Expand the profile group and select a profile.

3 If the profile is locked, choose Unlocked from the pop-up menu.

4 Expand the profile to view the groups of properties available for the profile.

5 Select a property group.

6 Set options to specify the criteria for the inspection. Options vary according to the selected category of properties under the profile. You can select or deselect criteria, edit values, or activate a property.

7 Select an alert option from the pop-up menu to specify how to handle mismatches during the inspection.

8 Click OK, or click Save to save your changes without closing the dialog box.

Preflight alert options

For each check in a profile, you specify how to handle mismatches during the inspection. You can select from the menu next to each alert icon. The icon for the alert appears next to the check in the Preflight dialog box.

Error Generates an error message for this check (or any checks in this category). Choose this option for mismatches that you must correct before proceeding to the next stage in the workflow.

Warning Generates a warning message for this check (or any checks in this category). Choose this option for mismatches that you want to know about and may need to correct before final output.

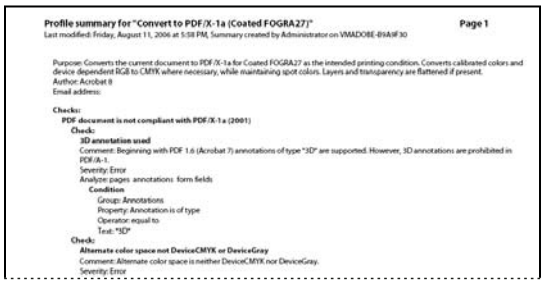
Info Generates a simple note for this check (or any checks in this category). Choose this option for mismatches that you want to know about but do not need to correct before final output.

Inactive Never generates an alert message for this check (or any checks in this category). Choose this option for mismatches that will not affect the output quality of the PDF document. You must change the state from Inactive to any other state to make the text boxes available.

View a profile summary

You can view a description of each check and its inspection criteria for a given profile by creating a profile summary.

❖ In the Preflight dialog box, select a profile, and choose Create Profile Summary from the Options menu.


Profile summary for "Convert to PDF/X-1a (Coated FOGRA27)" Page 1

Last modified: Friday, August 11, 2006 at 5:58 PM, Summary created by Administrator on VMADOBE-B9A9F30

Purpose: Converts the current document to PDF/X-1a for Coated FOGRA27 as the intended printing condition. Converts calibrated colors and device dependent RGB to CMYK where necessary, while maintaining spot colors. Layers and transparency are flattened if present.
Author: Acrobat 8
Email address:

Checks:
PDF document is not compliant with PDF/X-1a (2001)
Check:
3D annotation used
Comment: Beginning with PDF 1.6 (Acrobat 7) annotations of type "3D" are supported. However, 3D annotations are prohibited in PDF/A-1.
Severity: Error
Analyze: pages annotations form fields
Condition
Group: Annotations
Property: Annotation is of type
Operator: equal to
Text: "3D"
Check:
Alternate color space not DeviceCMYK or DeviceGray
Comment: Alternate color space is neither DeviceCMYK nor DeviceGray.
Severity: Error

A profile summary is a PDF file.

Additional checks

About additional checks and properties

The Preflight tool includes a collection of additional checks (called *rules* in previous versions of Acrobat) that you can add to a profile. These checks are available from the Custom Checks section of each profile. You can modify these checks in a variety of ways, depending on the PDF property they describe.

Some properties are defined by a simple statement that is either true or false for a given object in a PDF—for example, "Font is not embedded" or "Color managed color used." Some property statements specify relationships between the actual value of a property (for example, text size or spot color name) and the value you enter in the dialog box (for example, "12" or "Deep blue"). Other statements compare numerical values.

Relationship between property value and typed value		Relationship between numerical values	Boolean properties
is equal to	is not equal to	is less than	is true
contains	does not contain	is less than or equal to	is not true
begins with	does not begin with	is equal to	
ends with	does not end with	is not equal to	
is contained in	is not contained in	is greater than	
		is greater than or equal to	

Property groups

The properties for defining a check are grouped in categories. You can view a list of all property groups in the Edit Check dialog box. In addition, you can view the individual properties that make up each group, as well as an explanation of how the Preflight tool uses the properties.

The following property groups are available:

Text Includes information about how text is rendered, whether it is scaled anamorphically or slanted, or whether it can be mapped to Unicode and thus copied or exported correctly.

Font Describes all aspects of a font in which text is rendered. Note that text size is a text property, not a font property, because a font can be used at many sizes throughout a PDF document. Text size is included in the Text property group.

Image Includes image resolution, bit depth, number of pixels, rendering intent, and more.

Colors Includes color characteristics, such as color spaces, alternate color spaces, patterns, and spot colors. Alternate color spaces enable Acrobat to display or print certain spot colors and multicomponent spot colors (DeviceN). For example, to reproduce the color orange on a monitor or printer, the PDF requires an alternate color space (made up of RGB or CMYK colors) that defines what the spot color looks like.

ICC Color Spaces Includes properties for accessing the characteristics in the embedded ICC profiles, which define the ICC color spaces. ICC profiles contain data for translating device-dependent color to a device-independent color space, such as Lab. This helps you reproduce color consistently across different platforms, devices, and ICC-compliant applications (such as Adobe Illustrator and Adobe InDesign). A document that contains objects in different color spaces (such as RGB, CMYK, and Grayscale) could have different ICC profiles for calibrating the color for each color space.

Graphic State Properties For Fill Includes graphic state information about how areas are filled, particularly the color values of the current color space.

Graphic State Properties For Stroke Includes graphic state information about how lines are drawn, particularly the color values of the current color space, as well as line-specific properties, such as thickness.

General Graphic State Properties Includes settings that control how text, graphics, or images are displayed in a PDF page. Overprint settings, for example, are included here.

Halftone Includes graphic state settings relevant to prepress operations, such as screen angles, frequencies, and spot shapes.

Page Description Includes general information about objects on a PDF page, such as the type of object (for example, whether it is an image, a piece of text, or a smooth shade) or whether it is inside or outside the viewable area of the page, or how far it is from the trim box.

OPI Includes properties for analyzing all existing OPI links (comments), whether from OPI version 1.3 or 2.0. The possible OPI entries in a PDF are the same as in PostScript files.

Embedded PostScript Refers to the PostScript code that can be embedded into the PDF. There are three properties: one for a PostScript operator used directly in a page description; one for PostScript code embedded in a PostScript XObject; and one for an early form of a PostScript XObject, a PostScript Form XObject.

Object Metadata Includes information embedded with the object, such as its creator, resolution, color space, copyright, and keywords applied to it. For example, if a Photoshop image with metadata is placed in an InDesign document, and the document is converted to PDF, this information can be retrieved and checked by properties in this group.

Annotations Includes most characteristics of comments and drawing markups, traps, and printer marks.

Form Fields Includes properties for form fields.

Layers Checks for optional content, which may affect the appearance of a page.

Pages Includes page numbers and page sizes that represent the various document boxes supported by Adobe PDF 1.3 and later technology (media box, bleed box, trim box, and art box). This group also includes plate names for PDF pages that belong to a preseparated PDF.

Document Includes all the pieces of information that apply to the PDF as a whole, such as whether the document is encrypted, contains form fields, or contains bookmarks.

Document Info Lists all the standard entries that can also be accessed by the Document Info dialog box in Acrobat, and information that has been standardized by the ISO 15930 standard (PDF/X).

Document Metadata Includes information embedded within the document, such as its title, author, copyright, and keywords applied to it. This information is also available in the Document Metadata section of the Document Properties dialog box in Acrobat. (Choose File > Properties, click the Description tab, and then click Additional Metadata.)

Structured PDF Includes several basic properties for the tagging structure in a tagged PDF, for which the PDF/A standard defines constraints.

Output Intents For PDF/X Or PDF/A Defines which output process the PDF has been prepared for. A PDF intended for high-resolution printed output typically contains an output intent with an embedded ICC profile, for use by a proofing device or a device's RIP (raster image processor).

Output Intent For PDF/X Or PDF/A (ICC Profile Properties) Includes properties for accessing information from an ICC profile embedded in the output intent. This group includes the same properties as ICC profiles for objects, such as profile name and type. The ICC profile describes the output condition of the device where the document will be imaged.

Efficiency Of PDF Content Stream Helps determine how efficiently page descriptions are encoded. For example, it is possible to include the text **Hello** as a text operator for the whole word, or as several text operators for each character in the word. The latter is less efficient and reduces the speed of page rendering. The efficiency checks return percentages for several types of operators. A smaller value in most cases is better than a higher value.

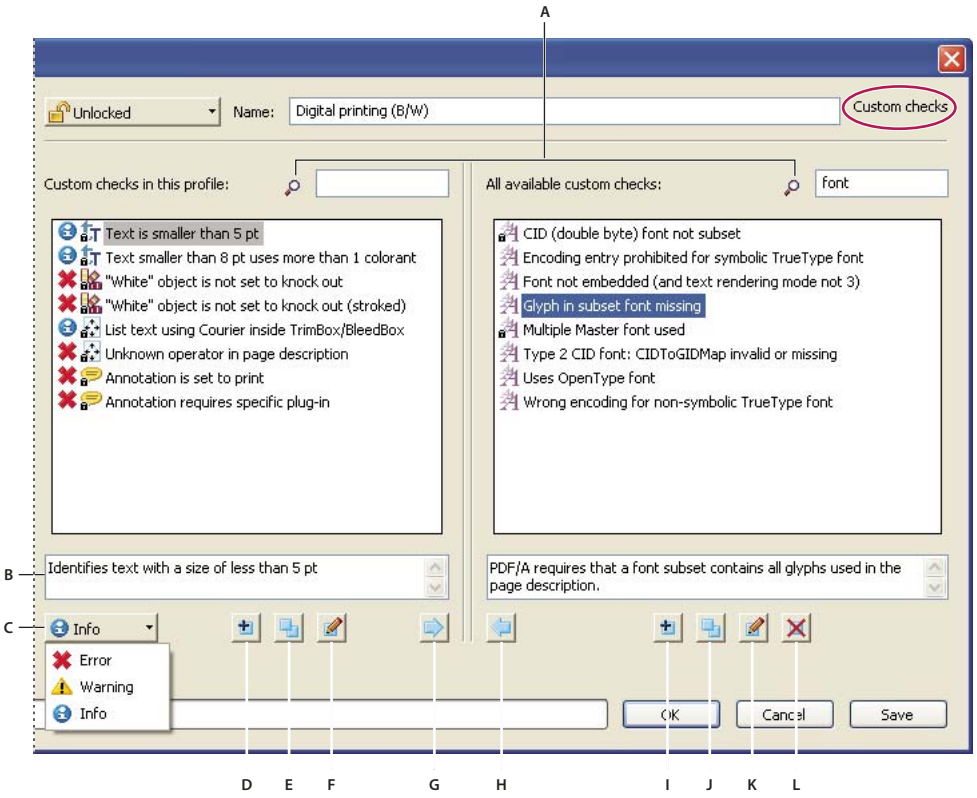
Errors In PDF Syntax Returns information about specific errors in a PDF's syntax. For example, if certain keys required by the PDF specification are not included, Acrobat may still be able to render the file. For predictable PDF rendering, however, it is preferable to encode all PDFs in strict compliance with the PDF specification.

Errors In Structured PDF Returns information about errors in the tag structure of a tagged PDF. For example, an error is returned if the type of a tagged object is not properly specified. The properties in this group help identify errors in tag structure.

Errors In PDF Content Stream Returns information about errors in the page descriptions in a PDF. For example, three number operands are required to define RGB color. If there are fewer than three operators, it is not possible to render the page. Properties in this group help determine the reasons why a PDF page isn't rendered.

Preflight Edit Profile dialog box overview (Custom Checks)

The Profiles list in the Preflight Edit Profile dialog box contains predefined profiles included with Acrobat, and any custom profiles you've created. If you select Custom Checks, you get more options for selecting and modifying items. The buttons at the bottom of the column perform basic editing functions, such as duplicating, removing, and creating. The search box helps you locate a specific check.



Custom checks
A. *Search* ***B.*** *Description* ***C.*** *Alerts* ***D.*** *Create New Check And Include in Current Profile* ***E.*** *Duplicate Check And Assign To Current Profile* ***F.*** *Edit Check* ***G.*** *Remove Check From Profile* ***H.*** *Include In Profile* ***I.*** *New Check* ***J.*** *Duplicate Check* ***K.*** *Edit Check* ***L.*** *Delete Check*

Add checks to a profile

Acrobat includes several predefined preflight profiles, which you can use as is or modify to create custom profiles. You can modify a profile that nearly meets your needs by adding one or more checks that analyze the document using different criteria. For example, an existing check might detect all text that is not plain black—that is, text that uses black plus some amount of cyan, magenta, and yellow. Because this could be a problem when you print small text, you could modify the check so that it flags text objects that use more than one color and have a text size equal to or smaller than 12 points.

You can reuse a check in any profile where it's needed. Keep in mind, however, that if you modify a check that's being used in multiple profiles, the check is modified in every profile that uses it. To avoid making unnecessary modifications, rename the check for a particular profile. Before editing a preflight profile, you must unlock it.

1 In the Preflight dialog box, select a profile, and click the Edit button , or choose Edit Preflight Profiles from the Options menu.

2 Choose Unlocked from the pop-up menu at the upper left.

3 Select Custom Checks from the list of items displayed under the profile name.

4 Work with the panels by doing any of the following:

- To quickly find a specific check, type all or part of its name in the search box. Only those items containing the search term are displayed. Removing the name from the search box displays all the checks again.
- To add a check to the profile, select the check in the right panel, click the left-facing arrow, and adjust the alert type, if needed, from the pop-up menu at the lower left of the dialog box. The alert type, which is Error by default, specifies what kind of alert the Preflight tool displays if it finds a mismatch. You can add as many checks as needed.
- To remove a check from the profile, select it in the left panel, and click the right-facing arrow.
- Double-click a check to edit it.

See also

"About preflight profiles" on page 483

"Lock, unlock, and password-protect profiles" on page 486

"See where a check or property is used" on page 493

"Correcting problem areas" on page 493

Create or modify custom checks

Although you can modify any unlocked predefined check, it's best to leave the predefined checks as they were configured. Instead, you can create a new check or base a check on an existing one.

1 In the Preflight dialog box, select a profile, and click the Edit button , or choose Edit Preflight Profiles from the Options menu.

2 Choose Unlocked from the pop-up menu at the upper left.

3 If necessary, expand the profile to display the categories underneath.

4 Select Custom Checks.

5 (Optional) Choose Info from the alert menu to prevent the Preflight tool from failing objects that don't match this check.

6 In the Preflight Edit Profile dialog box, do one of the following:

- Click the New icon .
- To base the new check on an existing one, select a check and click the Duplicate icon .

7 In the Edit/Duplicate Check dialog box, do any of the following, and then click OK:

- Type a name and description in the boxes on the left.

- Type the message you want to display when the check finds a mismatch (fires) and when it doesn't find a mismatch. For example, if you're defining a check against the use of spot colors, your message when no mismatch is found could be "Document has no spot colors."
- Select whether to apply the check to page contents, annotations, form fields, or all those objects.
- For Group, specify the group from which properties are to be used.
- For Property, select properties and specify criteria to be evaluated against.

See where a check or property is used

❖ Double-click a check, and then click Usage in the Edit Check dialog box to see which profiles use the check.

Correcting problem areas

About preflight fixups

You can use the Preflight tool to fix many errors in a document. To do this, you add error corrections, called *fixups*, to a profile. The fixup automatically corrects the problem, if possible, or provides information so that you can correct the problem in the source file. A profile with a fixup has the gray wrench icon next to it. An outline of a wrench means that no fixups are associated with the profile.

Preflight includes several predefined fixups that you can add to a profile. These cover a broad range of errors that affect color, fonts, images, print production, compliance with international standards like PDF/X and PDF/A, and other areas. Preflight also includes a toolkit for creating your own fixups.

Note: *A fixup permanently changes the document.*

For example, fixups can perform the following actions to correct errors:

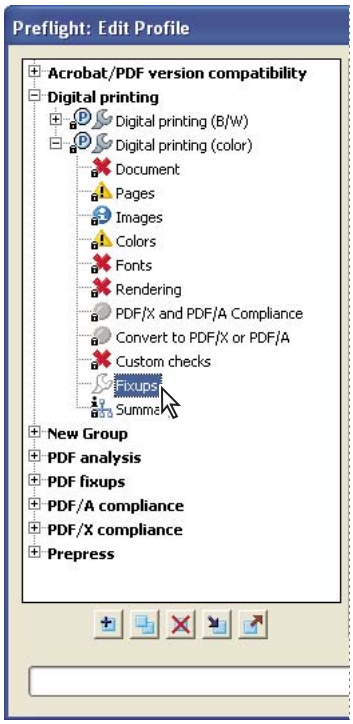
- Convert color spaces, just as the Convert Color feature does.
- Repair documents and eliminate unneeded content to reduce file size, just as PDF Optimizer does.
- Convert the PDF to a different version.
- Widen hairlines.
- Flatten transparency.
- Remove objects outside the trim and bleed boxes.
- Prepare the PDF for PDF/X or PDF/A conversions.
- Set document information.

Add fixups to a profile

The Preflight tool includes a collection of fixups that you can add to a profile. These are all available from the Fixups section of each profile.

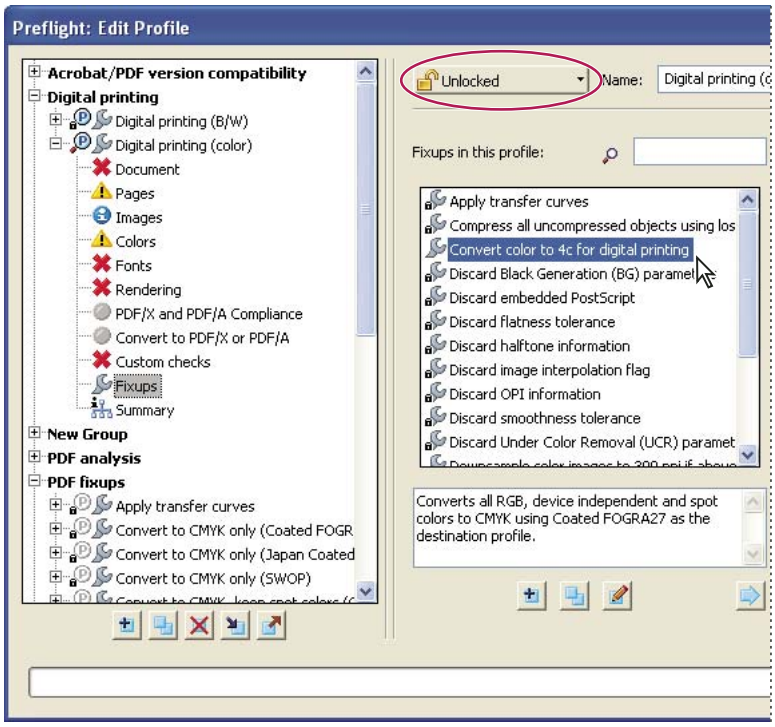
1 Open the Preflight dialog box, and click Edit.

2 Expand the category with the profile you want, and then expand the profile.



3 If necessary, unlock the profile so that you can modify it. Choose Unlock from the pop-up menu at the top.

4 Select Fixups from the items under the profile.



Fixups are available from the Fixups section of each profile.

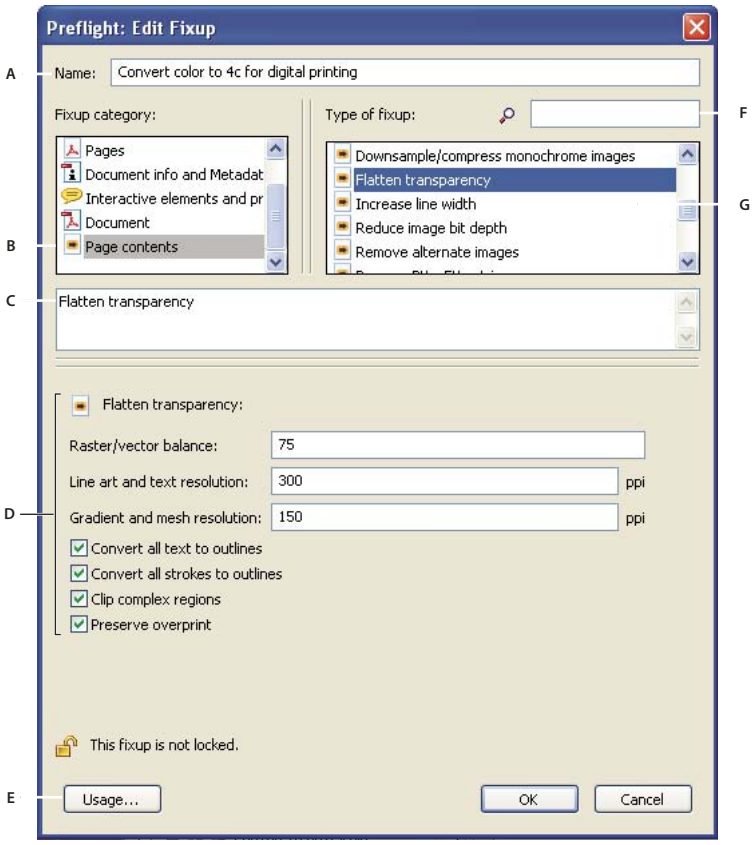
5 Select a fixup from the column on the right and click the left-facing arrow to move the fixup to the column on the left.

You can add as many fixups as you want.

Note: *To remove a fixup from a profile, select the fixup from the list on the left and click the right-facing arrow.*

Edit Fixup dialog box overview

The Edit Fixup dialog box lists the types of predefined fixups you can add to a profile, and the values associated with each fixup. You can use the Edit Fixup dialog box to change the values associated with a fixup, or create a custom fixup based on an existing one. Like checks, fixups are organized by categories.



Edit Fixup dialog box
***A.** Fixup name **B.** Fixup categories **C.** Description **D.** Fixup criteria **E.** Button for seeing which profiles use the fixup **F.** Search **G.** Areas in the fixup that can be modified*

Create or modify fixups

You may want to create a custom fixup for certain jobs or output devices. The settings you specify determine such things as what output intent is used, what color conversions take place, how images are compressed and sampled, and what PDF compatibility level the PDF must support. Although you can modify any of the predefined fixups, as long as they are unlocked, it is better to duplicate an existing fixup and change its values. This technique is particularly useful if the fixup belongs to multiple locked profiles, and you don't want to find and unlock all those profiles. A duplicated fixup is unlocked by default because it does not yet belong to a profile.

Create a new fixup

1. In the Preflight Profile dialog box, click the Edit button.
2. Select a profile and unlock it.
3. Select the Fixups category on the left, under the profile.
4. Click the Create button .
5. Name the fixup and specify criteria.

Create a fixup based on an existing one

1. In the Preflight Profile dialog box, click the Edit button.

2 Select the Fixups category on the left, under the profile.

3 To unlock the fixup so that you can modify it, choose Unlocked from the pop-up menu at the top.

4 In the Preflight Edit Profile dialog box, select the fixup you want to modify, and click the Duplicate button .

5 In the Duplicate Fixup dialog box, select a category in the left column, and then select an option in the right column. The options in the right column are the areas you can modify.

6 To see which profiles currently use this fixup, click Usage. You may need to unlock other profiles before you can modify the fixup.

7 Do any of the following, and click OK:

- To rename the fixup, type in the Name box at the top.
- To change the description of the area you're modifying, type in the box just below the categories.
- To change how an error is handled, specify options or values for each selected fixup option.

PDF/X- and PDF/A-compliant files

About PDF/X and PDF/A standards

PDF/X and PDF/A standards are defined by the International Organization for Standardization (ISO). PDF/X standards apply to graphic content exchange; PDF/A standards apply to long-term archiving of electronic documents. During PDF conversion, the file that is being processed is checked against the specified standard. If the PDF will not meet the selected ISO standard, a message appears, asking you to choose between canceling the conversion or going ahead with the creation of a non-compliant file.

The most widely used standards for a print publishing workflow are several PDF/X formats: PDF/X-1a, PDF/X-3, and (in 2007) PDF/X-4. The most widely used standards for PDF archiving are PDF/A-1a and PDF/A-1b (for less stringent requirements).

Note: *For more information on PDF/X and PDF/A, see the ISO website and the Adobe website.*

Convert PDFs to PDF/X or PDF/A

You can validate PDF content against PDF/X or PDF/A criteria and save a copy of the PDF as PDF/X or PDF/A, provided it complies with the specified requirements. For example, under certain circumstances, an ICC profile that describes the destination device is required for PDF/X-1a, PDF/X-3, and PDF/X-4 compliance. If your document doesn't have an embedded ICC output profile, you can embed one before saving.

Note: *You can also create PDF/X- and PDF/A-compliant files using Acrobat Distiller.*

The PDF/X or PDF/A icon at the lower left of the Preflight dialog box indicates the PDF/X or PDF/A status of the current document.



PDF/X buttons (similar PDF/A buttons appear)
***A.** Convert to PDF/X **B.** Verify PDF/X **C.** Not a valid PDF/X **D.** Valid PDF/X **E.** Remove PDF/X*

1 If the PDF/X or PDF/A icon at the lower left of the Preflight dialog box indicates that the PDF is not PDF/X- or PDF/A-compliant, do one of the following:

- Click the icon next to the text "Not a PDF/X file" or "Not a PDF/A file."
- Choose Convert Current PDF To PDF/X (or PDF/A) from the Options menu.

2 Select a PDF/X or PDF/A standard.

3 Specify conversion options, and click OK.

4 Do one of the following, depending on the results of the conversion:

- If the conversion succeeds, save the PDF. A green check mark appears in the Preflight dialog box.
- If the conversion fails, view the results in the Results list, or click Report to see the results. A red X appears in the Preflight dialog box. When prompted, click OK to view the Preflight results.

See also

"About PDF/X and PDF/A standards" on page 497

"Adobe PDF settings" on page 102

PDF/X and PDF/A conversion options

PDF/X and PDF/A versions Select the PDF/X or PDF/A version to convert the PDF to.

Trapped Key (PDF/X only) A PDF/X-compliant file requires the Trapped key to be set to True or False. If you know that the document contains trapping information, select Set Trapped Key To "True." If you don't know the trapping status or if you know that the document does not contain trapping information, select Set Trapped Key To "False."

Set Output Condition To Indicates the printing condition for which the document has been prepared.

Use Embedded Output Intent If Present Uses an output intent that has already been embedded in the PDF.

Omit ICC Profile Unless Embedding Is Required An ICC profile is not required for an output intent. PDF/X-1a in many cases does not require embedding the profile. PDF/X-3 does not require embedding the profile unless a device-independent color is used. PDF/X-4 always requires embedding. PDF/A in many cases does not require embedding an ICC profile.

Verify a PDF against PDF/X or PDF/A criteria

PDF/X and PDF/A files can be created in a variety of ways, such as by using Acrobat Distiller. If you open a PDF/X or PDF/A file created by Distiller or another application and start the Preflight tool, you may see the Verify PDF/X icon  or Verify PDF/A icon at the bottom left of the Preflight dialog box. This icon indicates that you need to verify that the file is PDF/X or PDF/A compliant. The PDF/X or PDF/A standard used to create the file and the color settings file associated with the file appear next to the icon.

1 In the Preflight dialog box, click the Verify PDF/X icon or Verify PDF/A icon. Preflight reports whether the PDF complies with the PDF/X or PDF/A standard used to create it. A green check mark appears in the icon if the verification succeeds. A red X appears in the icon if the verification fails.

2 After verification, view the results in the Results list, or click Results to see them.

Remove PDF/X or PDF/A information

You can remove all PDF/X- or PDF/A-specific information, such as the output condition or the GTS_PDFX version key. This is useful if a PDF/X- or PDF/A-compliant file has been modified, if you want to start over, or if an ICC profile increases the file size too much.

1 In the Preflight dialog box, click the Remove PDF/X icon or the Remove PDF/A icon . The icon of a PDF/X- or PDF/A-compliant file has a green check mark in the lower right corner.

2 When prompted, click Yes.

Automating document analysis

About droplets and batch processing

If you routinely use the same preflight profile to inspect documents, you can use a droplet or a batch-processing command to process files.

A *droplet* in Preflight is a small application that runs a Preflight inspection on one or more PDFs that you drag onto the Droplet icon . You can save a droplet on the desktop or to another location on your computer.

Like droplets, *batch processing* inspects multiple files at once, separates successful files from problem files, and creates reports in designated locations. In addition, *hot folders* can convert multiple file types (JPEG, HTML, RTF, and so on) to PDF or to PDF/X using conversion settings you specify; inspect the files using specified profiles; and output them in any format Acrobat supports, including PDF and PostScript.

Note: *If you are inspecting only files, you probably don't need to save changes or save copies in output folders.*

See also

"Processing in batches" on page 364

"Create a results report" on page 480

Create and edit a droplet for running a preflight inspection

When you inspect files using a droplet, you can separate successful files from problem files, and review results in an optional report.

See also

"Create a results report" on page 480

Create a droplet

1 Choose Create Preflight Droplet from the Options menu in the Preflight dialog box.

2 Choose a Preflight profile from the pop-up menu. Create a new one if the exact profile you need is not listed.

3 Specify settings for handling the PDFs after the preflight inspection, and then save the droplet.

Edit droplet settings

1 Double-click the Droplet icon , or choose Edit Preflight Droplet from the Options menu of the Preflight dialog box.

2 Change the settings you want to modify, and then save the droplet.

Droplet settings

Use the droplet options to specify how the Preflight tool processes PDFs when you drag them onto the Droplet icon.

Note: *You also specify these options when you run a preflight inspection using batch processing. (See "Processing in batches" on page 364.)*

Keep Profile [profile] Uses the currently selected profile for the preflight inspection.

Capture Inserts the profile being used in the droplet into the profile list under the Imported Profiles category.

Change Profile Provides a menu of all available profiles. You can select a different profile for the preflight inspection.

Run Preflight Profile Without Applying Fixups Inspects and reports on problems without correcting them. This option is available only if you choose a profile that includes a fixup for correcting problems.

Copy PDF File Places a copy of the PDF in the Success or Error folder.

Move PDF File Moves the inspected PDF to the Success or Error folder.

Save Alias Of PDF File Places a link to the PDF in the Success or Error folder, so that the original file is not moved from its location.

Create Report And Save In Success/Error Folder Lets you specify the type of report and amount of detail. This report indicates the results of the preflight inspection.

Settings Lets you change report options.

Success/Error Folder Lets you specify a folder and location for the files and optional reports.

Display A Summary PDF Creates a report of files that generated mismatches during the inspection. The report indicates the location of each file; the path to the file is an active link.

Output intents

About output intents in PDFs

An *output intent* describes the final destination device you will use to reproduce the color in the PDF, such as the separations printing device. Output intents can override working spaces during viewing and printing, but they do not convert the colors in the PDF.

Note: *In a PDF/X1-a workflow, the output intent describes the working CMYK space. In a PDF/X-3 workflow, the embedded ICC profile in the output intent is used to convert any objects with color-managed color to the color space of the ICC profile in the output intent. In most cases this will be CMYK, but can also be RGB or Grayscale.*

There are two kinds of output intents: One includes an embedded device profile that defines the color space of the destination device, such as U.S. Web Coated (SWOP) v2; the other is a name that defines the destination color space and usually names a standard output condition. Using a named output intent rather than an embedded profile helps reduce the size of a PDF, but this is typically only possible for PDF/X-1a files, or PDF/X-3 files that do not contain color-managed color.

You include output intents when you create PDF/X (or PDF/A) files, using the Standards panel of the Adobe PDF Settings dialog box. (You access Adobe PDF Settings differently, depending on the application you're using.) You can also use third-party plug-ins to include output intents. For documents with named output intents rather than embedded profiles, the program looks for the color profile associated with the named intent.

See also

"Adobe PDF settings" on page 102

Create output intents

1 On the Output Intents tab of Preflight Preferences, do one of the following:

- To create a new output intent from scratch, click the Create A New Output Intent icon .
- To create an output intent based on an existing one, select an option from the list on the left, and then click the Duplicate Selected Output Intent icon . An integer is appended to the name of the duplicated output intent.

2 Set output intent options.

See also

"Preflight preferences" on page 475

Extract an output intent for reuse

You can extract an embedded output intent from another PDF, and then add it to the list of output intents in Preflight preferences.

1 On the Output Intents tab of Preflight Preferences, click Capture.

2 Locate the file with the embedded output intent you want and open it.

The output intent appears at the end of the list, with a name that indicates it was captured from a certain type of file, for example, "Captured Output Intent from PDF/X file."

Export an ICC profile from an output intent

1 On the Output Intents tab of Preflight Preferences, select the output intent and click Export ICC Profile.

2 Specify a name and location, and click Save.

The ICC profile appears with the other ICC profiles in the Profiles folder.

Delete an output intent

1 On the Output Intents tab of Preflight Preferences, select the output intent and click Delete .

2 Confirm the deletion.

Chapter 18: JDF instructions

You can create custom product definitions and save them as Job Definition Format (JDF) files.

Job definition format (JDF) files

About JDF files

A *Job Definition Format file* (JDF file) is based on XML, a nonproprietary information carrier that can link and refer files to multiple production devices. Using JDF, content creators and print service providers can describe the intent of a printed piece, as well as each process step required to achieve that intent. A JDF job definition file is like a self-directed electronic job ticket that holds not only the job content (InDesign files or PDFs, for example) but also instructions to interact with JDF-enabled production systems. Jobs are automatically routed through each workflow step—from PDF creation, through preflight and correction, to final print production.

What does a JDF file include?

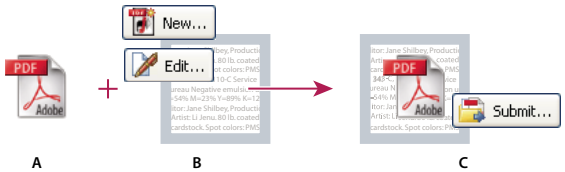
JDF files include such data as media and ink requirements, production quantities, customer information, and product descriptions. The JDF file also includes references to files that contain pages and describes how those pages should be ordered to make the product. In addition, the JDF file may include certain information necessary for the creation of PDFs appropriate for the production process, including PDF conversion settings and preflight profiles. Depending on the job definition instructions and the results of specified processes, a JDF file may also include a validation stamp, indicating that the print job was built according to the settings and verified.

Process validation

The ability to embed PDF conversion and preflight settings in a JDF package, and to verify that steps and processes were completed successfully, ensures the integrity of the files before the job enters print production. For example, a print service provider or content originator can use JDF to control PDF creation and preflight inspection automatically. This is done by specifying the PDF conversion settings and preflight profile that a job must conform to before it can enter the workflow production system. If the process is completed successfully, a validation stamp is added to the JDF, and validation text appears on the computer screen.

How are JDF job definitions generated?

JDF job definitions can be generated directly from within Acrobat 8 software or based on a *JDF template* supplied by the print provider. These templates typically include Adobe PDF conversion settings, preflight profiles, and sometimes other commonly used job specifications. Because JDF job definitions are based on XML, they can start as high-level definitions describing only a rough outline of a printed piece and be modified later to add more concrete details. Or, they can be completely created in one session.



Basic JDF workflow
A. *PDF file* ***B.*** *New or edited JDF job definitions* ***C.*** *PDF associated with job definitions, ready to be submitted to a JDF device*

View JDF job definitions

A JDF job definition in Acrobat contains references to the files to be printed as well as instructions and information for print service providers at the production site.



JDF Job Definitions dialog box

Open the JDF Job Definitions dialog box

❖ Use either of the following methods:

- Choose Advanced > Print Production > JDF Job Definitions.
- Select the JDF Job Definitions tool on the Print Production toolbar.
- You can also double-click a JDF file on your computer to start Acrobat and list the JDF file in the dialog box.

View specifications of the print job

The components of a print job, their individual specifications, and the order in which they will be printed are listed in a document hierarchy, which appears on the left side of the Edit JDF Job Definition dialog box.

1 In the JDF Job Definitions dialog box, select an item in the list, and click Edit.

2 In the document hierarchy on the left of the Edit JDF Job Definition dialog box, expand areas to list the components of a section, and then do any of the following:

- Select the job definition name—the first item in the hierarchy—to view basic print job specifications and customer information. The JDF definition may be labeled "Product."
- Select a section—the second level in the hierarchy—to view page layout, media, and ink specifications.
- Select a file to see information specific to that file.

3 Click tabs to view different specifications.



Edit JDF Job Definition dialog box
A. *Document hierarchy* ***B.*** *JDF job definitions tabs*

Create JDF job definitions

You can create new JDF job definitions in a variety of ways using the JDF Job Definitions dialog box. Each resulting JDF file can be edited and used in a production environment. Commercial printers who routinely print certain types of jobs may find it useful to create several JDF files that match these job types, and use them as templates. Using a template saves time and avoids costly mistakes, but may not be appropriate for every job. Before you construct a new job definition from scratch, review existing job definitions for ones that achieve results similar to what you want.

1 In the JDF Job Definitions dialog box, click New.

2 Select a method of creating a new job definition:

New Creates a blank job definition.

Based On The Document Uses the properties of a currently open PDF, such as size and number of pages. Select a document from the list on the right, which displays the names of files currently open in Acrobat.

Based On The Job Definition Creates a copy of an existing job definition with all its properties, including the list of referenced files. Be sure that the page content is changed before you proceed with the rest of your workflow. If you select this option, a list of available job definitions for your selection appears to the right, which shows a list of JDF files present in the JDF Job Definitions dialog box.

3 Specify which version of the JDF specification your job definition will be compatible with.

Note: *The default is 1.2. This option is not available if Based On The Job Definition is selected in step 2. In this case, the version is the same as that of the selected job definition.*

4 Click Browse to specify the name and location, and then click Save.

5 In the Create New Job Definition dialog box, click Create (or Create And Edit to display the specifications for modification).

Edit JDF job definitions

Job definitions can come from a number of sources, including InDesign CS2 and later, and Acrobat 7.0 Professional and later. You can edit these job definitions using the Edit JDF Job Definitions dialog box.

The Contacts Manager and Media Manager both open dialog boxes for specifying information you can apply to each component in the print job.

See also

"Adobe PDF presets" on page 100

"Adobe PDF settings" on page 102

"Preflight profiles" on page 483

"Specify contact information for a print job" on page 506

Edit a job definition

You can add various types of files to the JDF, including PDFs, InDesign files, Word files, PostScript files, and so on.

1 In the JDF Job Definitions dialog box, select the job definition, and click Edit.

2 Expand the items on the left, and do any of the following:

- To change the order in which the components will be printed, select a component and click the Move Up or Move Down button at the bottom.
- To add a second-level element to the hierarchy, click Add Section.
- To add a file to the job definition, click Add File, locate the file, and then specify the page range you want to include in the print job using options in the General tab.



Add the files in the order in which they will be printed—for example, front cover, body, back cover.

- To modify other settings, select a component, click a tab, and modify the settings as desired.

3 When you finish, click OK, or click another tab to edit more options.

General tab options

Product Name A unique name for the product or print job.

Job ID/Job Part ID Job identification or reference code used by people involved with the job.

Submit To Lists the available production sites that have been set up using the Submission Manager. Select the production site for the print the job, or leave as Unspecified to postpone this decision until submit time. (See "Create submission site instructions" on page 509.)

Preflight Profile Uses the criteria in the selected preflight profile to validate the Adobe PDF files in the print job. The preflight profile is determined by the production site specified in the Submit To option.

PDF Conversion Settings Converts non-Adobe PDF files using the settings in the selected Adobe PDF settings file. The conversion settings are determined by the production site specified in the Submit To option.

Preflight Status Indicates whether the JDF file and its associated documents have been submitted and inspected using the Preflight tool. This option also indicates whether any issues were identified. This information is embedded in *JDF audit*, a metadata element that JDF-enabled production systems can read to determine if the PDF is ready to move to the next step of the process.

Description Lets you add comments to the job definition for the receiver of the job definition.

Use Binding Exposes the Type and Side menus for setting a binding specification.

Customer Info tab options

Use the Customer Info options to identify the customer and others critical to the project.

Billing Code A code to bill charges incurred during production.

Customer ID Customer identification used to match this job definition to a billing or higher-level MIS (Management Information System). This ID is usually the internal customer number of the MIS that created the job.

Customer Job The name that the customer uses to refer to the job.

Customer Order ID The internal order number that represents the contract between the commercial printer and the customer. This number is usually provided when the order is placed, and then referenced on any correspondence between the printer and the customer referring to this job, including bills, change orders, deliveries, and so on.

Contacts A list of people involved with the job and their roles.

Specify contact information for a print job

You specify the contact information for your print job using the Contacts Manager.

Specify or update contact information

1 In the JDF Job Definitions dialog box, click Contacts Manager, and then make a selection:

- Click Add to specify a new contact.
- Select a contact in the list, and click Edit to update the information.
- Select a contact in the list, and click Duplicate to base a new contact on an existing one.

2 In the Contact Information dialog box, fill in the name and address text boxes.

3 Do one of the following to update the Communication Channels section:

- Click Add to enter new information. The options change according to the type of communication channel you choose.
- Select an item in the list, and click Edit to update the information.
- Select an item in the list, and click Remove.

Add a contact to a job definition

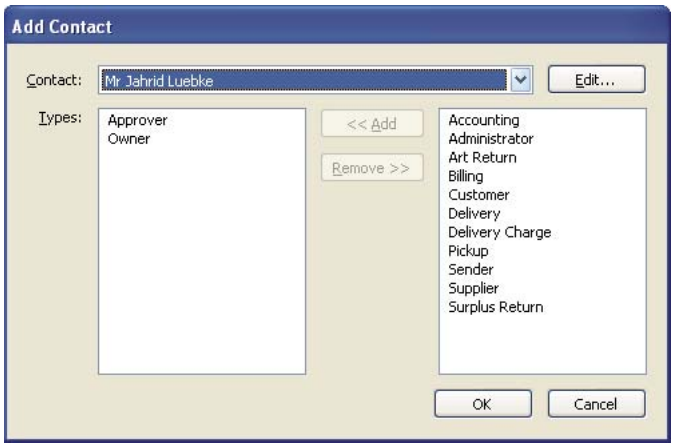
1 In the JDF Job Definitions dialog box, select a job definition, and click Edit.

2 Click the Customer Info tab.

3 In the Contacts section, click Add.

4 Choose a name from the Contact pop-up menu.

5 Double-click a job function in the right column, or choose job functions in the right column, and click the Add button. You can choose from the default list or add custom job functions.



Add Contact dialog box

6 If the contact information isn't correct, click Edit and update the information.

7 When prompted, choose whether to update the contact in the current job definition, or update the information in the Contacts Manager as well.

Add a job function to a job definition

1 In the JDF Job Definitions dialog box or on the Customer Info tab, click Contacts Manager.

2 Click Additional Contact Types.

3 Update the list of job functions and contact types, as needed:

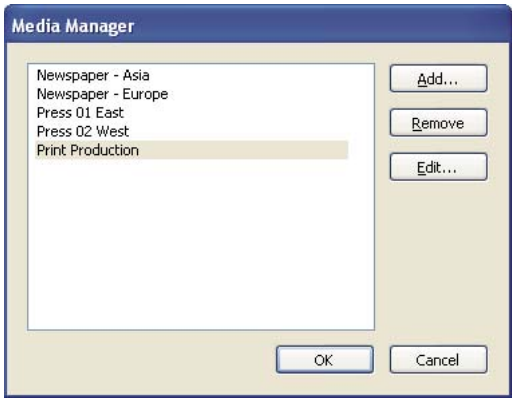
- Click Add to enter a new job function.
- Select a job function in the list, and click Edit to update the information.
- Select a job function in the list, and click Remove.

Define media specifications for a print job

You specify the media for each component of your print job using the Media Manager. If you know the stock brand, you can specify it. Otherwise, you describe the characteristics of the medium, and a particular stock is matched to those characteristics at the production site.

Define media specifications

1 In the JDF Job Definitions dialog box, click the Media Manager button.



Media Manager dialog box

2 Enter the media specifications that you want to apply:

- Click Add to enter new information.
- Select an item in the list, and click Edit to update the information.
- Select an item in the list, and click Remove.

Add a media specifications to a job definition

1 In the JDF Job Definitions dialog box, select a job definition and click Edit.

2 In the document hierarchy, select a section in the second level of the hierarchy.

3 Select an option from the Media pop-up menu.

4 If a media option doesn't exist, or there is no media appropriate for the job definition, click the Media Manager button.

5 Update the media specifications, as needed:

- Click Add to enter new information.
- Select an item in the list, and click Edit to update the information.
- Select an item in the list, and click Remove.

Media options

Use Media options to specify paper requirements.

Description Unique identifier for the media.

Media Type Paper or transparency.

User Media Type A description of the type of media.

Grade The grade of the paper. The offset printing grades are based on a scale of 1 through 5, where Gloss-Coated is "1" and Uncoated, Yellowish is "5."

Weight The intended weight of the media, measured in grams per square meter (g/m^2).

Thickness The thickness of the chosen medium, measured in microns (m).

Opacity The opacity of the media. Use Opaque for two-sided printing when you don't want the printing on the other side to show through under normal light. Use translucent for back-lit viewing.

Texture The intended texture of the media.

Front/Back Coating The prepress coating applied to the front and back surfaces of the media.

Stock Brand The brand name associated with the media.

Stock Type Available stock types. Note that Offset includes book stock.

Brightness Reflectance percentage.

Recycled Amount The percentage, between 0 and 100, of recycled material the media must contain.

Color Media color.

Shade The color's shade, light or dark.

Clear An option for specifying whether the color is translucent.

Add and remove JDF job definitions

You can reuse and share JDF job definitions with other users. For example, print service providers can provide them to their customers to ensure that print jobs are specified correctly before the jobs are handed off to production.

Add job definitions to the job list

1. In the JDF Job Definitions dialog box, click Add.
2. Locate the JDF job definition file (.jdf extension) and click Open, or double-click the job definition file.

The job definition appears in the JDF Job Definitions list.

Remove job definitions from the job list

❖ In the JDF Job Definitions dialog box, select the job definition, and click Remove.

Submitting print jobs

Create submission site instructions

At any time, you can prepare your JDF package (the JDF file and PDF file) for submission using submission site instructions. Any preflight profile or PDF conversion settings file embedded in the job definition is used in the submission process.

See also

"Adobe PDF presets" on page 100

"Adobe PDF settings" on page 102

"Run a preflight inspection" on page 474

Create submission site instructions

1. In the JDF Job Definitions dialog box, select the job definition, and click Submission Manager.
2. Click Add, or select an item in the list and click Edit or Duplicate.
3. Set submission site options.

Note: *The options you set are automatically invoked when you submit the job to a JDF-enabled production system.*

Remove submission site instructions

1. In the JDF Job Definitions dialog box, select the job definition, and click Submission Manager.
2. Select an item in the list, and click Remove.

Submission site options

Use options in the Submission Setup dialog box to specify which actions to perform on the print job during the submission process.

Name A unique name for the submission site.

Default PDF Conversion Settings When the job definition is sent through the submission process, any referenced non-Adobe PDF files are converted to Adobe PDF. The conversion settings come from either the PDF Conversion Settings embedded in the job definition or the Default PDF Conversion Settings pop-up menu in the Submission Site dialog box. Any PDFs referenced by the job definition before submission are not affected by the specified PDF Conversion Settings.

Verify That PDF Files Are Consistent With The JDF Job Definition Compares the information in the job definition with the associated files, and verifies that all associated files exist and are linked to the appropriate URL. Any inconsistencies in page sizes, inks, and the number of pages available in the associated documents result in an error. For example, an error is reported if the job definition specifies that pages 1 through 12 from document A will be used but document A contains only 8 pages. You can either fix the job definition to match the document, use other features to fix the document, or continue without making changes.

Note: *Not all errors are fixable.*

Combine PDF Files Into A Single PDF File Combines PDFs in the document hierarchy into a single PDF. A nonprinting annotation can optionally be added to the corner of each page, indicating the section name and page number of that page within the section.

Important: *This feature is not recommended for workflows that rely on PDF/X compatibility, because changes to the referenced PDFs may make them noncompliant with the PDF/X specification. Any noncompliance will be tested if the Preflight option is selected with an appropriate PDF/X profile.*

Insert Blank Pages Inserts blank pages into the combined PDF where no PDF pages are referenced (for example, if a section has been specified to contain 12 pages but no PDF has been referenced).

Include Annotations Adds annotations to the submitted PDFs to indicate their position in the job.

Preflight PDF Files Runs a preflight inspection of the associated PDFs. The preflight profile used is either the Preflight profile embedded in the job definition or the one selected in the Default Preflight profile pop-up menu in the Submission Site dialog box.

Convert To MIME Package And Submit To JMF Device Packages the JDF file and associated PDFs as a single MIME (Multipurpose Internet Mail Extensions) file. MIME is a specification for formatting non-ASCII messages so that they can be sent over the Internet, ensuring they do not get separated from each other. This allows the package to be sent to an output device that supports Job Messaging Format (JMF), at the URL you specify. JMF enables electronic devices to communicate over a network.

Submit To Folder Submits the JDF file and associated PDFs to the folder you specify in the Path box.

Prompt User For A Folder Location At Submit Time Unlike the Submit To Folder option, this option lets you specify a folder to receive the submitted JDF and associated PDFs when the job is submitted.

Submit files to a production system

When you are ready to hand off the print job to submission, submit the job definition and associated PDFs to a preconfigured JDF-enabled production system. Depending on your selections in the Submission Setup dialog box, inconsistencies between the job definition and the PDF are listed, followed by the results of a preflight inspection.

1 In the JDF Job Definitions dialog box, select the job definition and click Submit.

2 If the Submission Site field is unspecified, choose a submission site from the Submit To menu. Otherwise, the submission site specified in the job will be shown and used.

3 Click Start.

4 If inconsistency errors are listed in the Submit dialog box, select them to see if you can correct them in the job definition. The Update JDF button becomes available if you can. (You can also click Next and Previous to move among the fixable errors.)

5 To update the job definition, select an error and click Update JDF. The job definition is automatically updated, and the error disappears. Some errors cannot be fixed completely. In this case, a warning appears in place of the previous error.

6 When you have corrected all fixable errors, click Continue.

7 If you selected Preflight in the Submission Site dialog box, Acrobat performs a preflight inspection of the PDF and displays the results.

8 Click OK to close the Preflight dialog box and continue the submission.

The Submit dialog box indicates the results of the submission process. If the submission fails, an alert describes why it failed. A JDF file isn't written, and a JDF package isn't sent to a JDF device.

See also

"Create submission site instructions" on page 509

"About preflight results" on page 476

Chapter 19: Adobe Version Cue

Using Adobe Version Cue

About Version Cue

Adobe Version Cue® is a file-version manager included with Adobe Creative Suite that integrates versioning and asset management into your existing workflows within and across Adobe Creative Suite components, including Adobe Photoshop CS2, Adobe InDesign CS2, Adobe Illustrator CS2, Adobe GoLive CS2, Adobe Acrobat, and Adobe Bridge. Version Cue consists of two components: a server included with Adobe Creative Suite that you can install locally or on a centralized server, and a client that's automatically installed with Adobe Creative Suite components, Adobe InCopy, and Acrobat.

You can use Version Cue in a single Adobe Creative Suite component, such as Photoshop, or across multiple components, such as Photoshop and Illustrator, to track changes to a file as you work on it. Use Version Cue to enable efficient workgroup collaboration by way of file sharing, version control, and online reviews.

You can use Bridge to access Version Cue Servers, projects, and files, and to quickly view and compare information about Version Cue-managed assets. For more information about using Bridge with Version Cue, see Adobe Creative Suite Help.

If you use Adobe Creative Suite, or if you have access to a shared Version Cue project and have been granted appropriate privileges by the project's owner, you can use the Version Cue Workspace Administration utility to create and manage users and groups, projects, and PDF reviews. For more information, see "About the Version Cue Administration utility" on page 533

Version Cue streamlines the following tasks:

- Creating historical versions of your files.
- Maintaining file security.
- Organizing files into private or shared projects.
- Browsing with file thumbnails, and searching file information and version comments.
- Reviewing file information, comments, and file status in private and shared projects while you browse.

See also

"Availability of Version Cue features" on page 512

Availability of Version Cue features

Different Version Cue features are available in different environments:

- If you use Acrobat 8 but not Adobe Creative Suite, you can gain access to the full Version Cue feature set by participating in a shared project; that is, you can gain access if another user on your network installs Adobe Creative Suite and gives you access to a Version Cue project in a Version Cue Workspace.
- If you use Adobe Creative Suite, you have access to the full set of Version Cue features, including Version Cue Administration.

See also

"About the Adobe dialog box" on page 513

"Getting the most out of Version Cue" on page 513

Getting the most out of Version Cue

In Version Cue, you create *projects* that you and other users can access through Adobe Creative Suite components, InCopy, and Acrobat 8. Projects keep related files together in one place. Version Cue manages the files in these projects. Because Version Cue works in all Adobe Creative Suite components, InCopy, and Acrobat 8, your design process isn't interrupted when you work on individual files within a project.

You can use Version Cue in a single application, such as Photoshop CS2, to track changes to a file as you work on it. In addition, workgroups or an individual can use Version Cue across applications. Multiple users can manage projects that contain files from all Adobe Creative Suite components and Acrobat 8. Projects can include non-Adobe files, such as text documents, billing forms, or spreadsheets. When you keep all managed files related to a project in one place, you eliminate the task of tracking down important files.

Here's an example of how you might use Version Cue with Adobe Creative Suite. You start by creating a new project and adding a Photoshop file containing the main image for a printed piece. Then, you add art from Illustrator and text from InDesign. Next, you add GoLive web elements to leverage your printed content for use in a web page. As you and your team work on each piece of the project, Version Cue creates *versions* to keep track of changes. When it's time to present the project, you create a PDF of each project file and use the Version Cue Administration utility to set up an online *PDF review*. Your customers, supervisors, or peer reviewers view and comment on the project using Acrobat.

See also

"Create and edit projects" on page 517

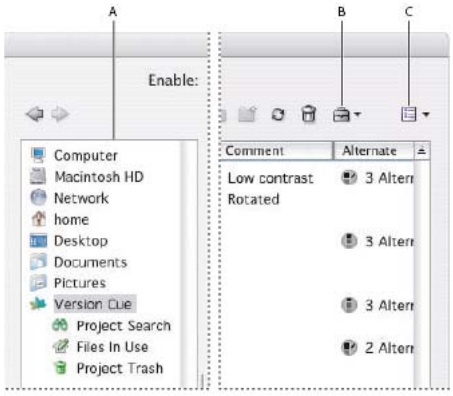
"Availability of Version Cue features" on page 512

About the Adobe dialog box

In Adobe Creative Suite 2.0 components (except for GoLive and Acrobat 7), and in InCopy CS2, you can use the Adobe dialog box when you choose the Open, Import, Export, Place, Save, or Save As commands, even if you don't use Version Cue. In Acrobat 8, you can use the Adobe dialog box when you choose the Open, Save, or Save As commands, even if you don't use Version Cue.

The Adobe dialog box displays additional information, including thumbnails, which make it easy to identify files. You can use the Adobe dialog box when working with both Adobe and non-Adobe files.

By default, when you choose the Open, Save, or Save As commands, the Operating System (OS) dialog box appears. To use the Adobe dialog box instead and set it as the default, click Use Adobe Dialog. Use the View menu options to customize the display. You can change back to the OS dialog box at any time by clicking Use OS Dialog.



Adobe dialog box
***A.** Favorites panel **B.** Project Tools menu **C.** View menu*

You can use the Adobe dialog box to accomplish these tasks:

- Add frequently used files and folders to the Favorites panel for quick access.
- View thumbnail images of files.
- Determine whether a file is open in Acrobat 8 or another Adobe Creative Suite application on your computer.
- Rename or delete files (Mac OS only).
- View metadata about files in the Properties panel. Metadata includes author, keyword, and copyright information.
- Access Version Cue projects and files as well as non-Version Cue files.
- View detailed information about Version Cue projects, such as the status of individual files.
- View and work with Version Cue versions.
- Search for files in a Version Cue project.
- Move Version Cue files to the Project Trash.
- Determine which Version Cue files are in use, and who is using them.
- Create a new Version Cue project, or connect to an existing Version Cue project.

See also

"View Version Cue Workspace, project, and file information" on page 516

"Availability of Version Cue features" on page 512

Turn Version Cue on or off

By default, access to Version Cue is turned off in Acrobat 8. You must manually turn on Version Cue in Acrobat 8 to use it. If you disable Version Cue, you won't have access to any Version Cue Workspace.

For information about turning Version Cue on or off in Adobe Creative Suite components, see Adobe Creative Suite Help.

1 Choose Edit > Preferences > Documents (Windows) or Acrobat > Preferences > Documents (Mac OS).

2 Select or deselect Enable Version Cue File-Version Manager.

See also

"Availability of Version Cue features" on page 512

Working with Version Cue projects

About Version Cue projects

Version Cue uses *projects* to store related files and folders. Projects are stored on Version Cue Workspaces.

If you work independently, you create a project to gather all the files you need and use Version Cue features, such as versions. In a workgroup, depending on your workflow, you can create one Version Cue project for files that everyone in your workgroup collaborates on, a different project for files that don't require collaboration, and yet another project restricted to specific users.

When you first open a Version Cue project, Version Cue creates a folder named "Version Cue" in your My Documents (Windows) or Documents (Mac OS) folder, and adds a folder for the project to it. When you open a file from that project, Version Cue adds a *working copy* of the file to the project folder. As you edit and save intermediate changes to your file, you are actually editing in the working copy; the original file on the Version Cue Workspace is protected.

After you open a Version Cue project, a shortcut to that project appears in the Open or Save dialog boxes. Remote Version Cue Workspaces also appear in this list after you access them.

Version Cue uses a special folder for each project: the *documents* folder. When you access the project, Version Cue automatically opens the documents folder and temporarily displays the project title as the folder name. You'll also see the documents folder if you open the working copies folder.

See also

"About working copies" on page 520

"Availability of Version Cue features" on page 512

Open a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. If the button is visible, click Use Adobe Dialog (if you see the Use OS Dialog button, you're already using the Adobe dialog box). Click Version Cue in the Favorites panel.

2 To open a Version Cue Workspace, double-click it.

Note: *If you don't see a desired Version Cue Workspace, choose Refresh from the Tools menu.*

3 To open a project, double-click it.



If the Use Adobe Dialog button doesn't appear in the Open or Save As dialog boxes, make sure that you've turned on the Version Cue preference in Acrobat.

See also

"About the Adobe dialog box" on page 513

"Connect to remote projects" on page 516

"Adding files and folders to a project" on page 522

Connect to remote projects

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

When you need to work on Version Cue projects that are located remotely, on a different subnet, you can use the IP address of the computer to access that Version Cue Workspace. Workspaces on computers within your subnet should be visible automatically.

The Version Cue Workspace can communicate with applications that are WebDAV enabled. When Version Cue is running on a server, you can use it as a WebDAV server. However, the native versioning features in Version Cue are more sophisticated than those available through WebDAV. WebDAV capabilities are provided for legacy workflows.

See also

"About the Adobe dialog box" on page 513

"Log in to and out of the Version Cue Administration utility" on page 535

"Availability of Version Cue features" on page 512

Connect to a remote project

1 Choose File > Open. If you are using the OS Dialog box, click Use Adobe Dialog. Click Version Cue in the Favorites panel. Choose Connect To from the Project Tools menu .

2 In the Connect To dialog box, enter the Version Cue Client URL (the Version Cue IP or DNS address), a colon, and the port number (3703)—for example, http://153.32.235.230:3703. If you have connected to the workspace before, it's not necessary to enter the port number.

You can display the Version Cue Workspace Administration utility login page to identify the Version Cue Client URLs that remote users and WebDAV applications need to access the workspace.

3 Click OK. After you connect to a remote Version Cue Workspace, the dialog box displays all available Version Cue projects in that workspace.

A shortcut to the remote workspace is automatically included in your list of available Version Cue Workspaces.

Connect to a project using WebDAV

❖ Refer to your application's documentation for information on using its WebDAV features, and then use the Version Cue WebDAV Client URL, the port number (3703), "webdav", and the project name to identify the project you want to work with—for example, http://153.32.235.230:3703/webdav/*project_name*.

View Version Cue Workspace, project, and file information

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open.

2 If the button is available, click Use Adobe Dialog (if you see the Use OS Dialog button instead, you are already using the Adobe dialog box).

3 Click Version Cue in the Favorites panel.

You can resize the Favorites panel to display items with long names: place your cursor over the vertical line to the right of the Favorites panel and drag it to the right.

4 To change the display of Version Cue Workspaces, projects, or files in the dialog box, do any of the following:

- To view the properties of a file, click the toggle to display the Properties panel.
- To change the display of a project, choose a display option from the View menu .
- To sort items in a column, while in detail view, click the column heading. Click the column heading again to reverse the order.
- To show or hide columns of information while in list view, right-click/Control-click the Name column heading, and choose Show All, Hide All, or a column name. (The Name column can't be hidden.) Visible columns have a check mark to the left of the column name.
- To change the location of a column, drag the column heading to the left or right of another column heading (Windows), or press Command+Option and drag the column heading to the left or right of another column heading (Mac OS). The Name column can't be moved.
- To resize a column of information, drag the vertical dividing line between column headings or double-click the line to automatically resize the column to fit the widest item in it.

5 To display information about a file, project, or Version Cue Workspace, do one of the following:

- Place the pointer over the item. A summary of file information appears in a tool tip.
- Right-click/Control-click the file and choose Versions to display information about a file's versions.

See also

"About the Adobe dialog box" on page 513

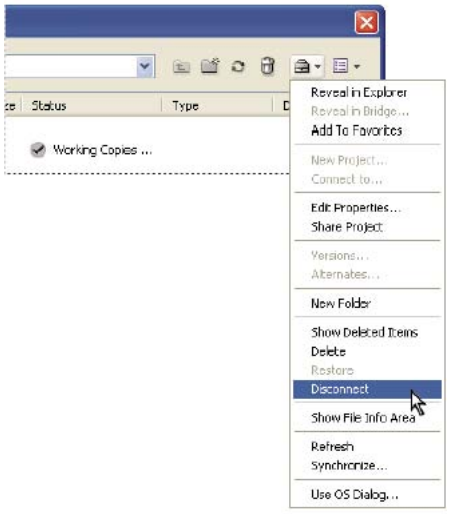
"Version Cue file statuses" on page 521

Create and edit projects

To begin using Version Cue, you need to create a Version Cue project. When you work with Version Cue, you decide what a project entails. For example, you can create a project to organize files for an entire publishing effort, or you can create a project to manage files for specific aspects of an advertising campaign. You can use a project to organize assets related to a particular customer or use a project to separate private files from files that are worked on collaboratively. You can add files to projects at any time.

When you create a Version Cue project, you specify a project name, the Version Cue Workspace that hosts the project, and a project description. You specify whether to share the project or keep it private. Shared projects are available to other users; however, you can password-protect shared projects to restrict access to specific users. You can create private projects on a workspace installed on your computer. If you create a project on a computer that is used as a server, it must be shared to be accessible.

You can create projects by using an Adobe Creative Suite component, InCopy, Acrobat 8, or the Version Cue Administration utility. The Version Cue Administration utility provides options for specifying advanced project properties. You create new Version Cue projects with it by importing a folder of files. These files are used as the project starting point.



Project Tools menu contains frequently used commands.

See also

"Share or unshare a project" on page 519

"Availability of Version Cue features" on page 512

"About the Adobe dialog box" on page 513

"Disconnecting from projects" on page 526

"Delete files and folders" on page 527

"Log in to and out of the Version Cue Administration utility" on page 535

Create a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Choose New Project from the Project Tools menu .

4 Choose a location for the project from the Location menu.

5 Enter a name for the project in the Project Name box and a description in the Project Info box. (The description you enter appears as a tool tip when the pointer is over the project in the list of workspaces.)

6 To make this project and its files available to others, select Share This Project With Others. (If the Version Cue Workspace is on a computer other than your own, the Version Cue project is shared by default.)

7 Click OK.

Edit the properties of a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box. Double-click the host Version Cue Workspace. Select the project, and then choose Edit Properties from the Project Tools menu.

2 In the Edit Properties dialog box, do any of the following, and click Save:

- To change the project name, enter a name in the Project Name text box. The new name will not be reflected on your (or your workgroup's) working copies project folder until you disconnect from and reconnect to the project.
- To change the description of the project, enter text in the Project Info box.
- To make this project and its files available to other users, select Share This Project With Others. (If the Version Cue Workspace is on a computer being used as a server, the Version Cue project is shared by default.) To unshare a shared project, deselect Share This Project With Others. Note, however, that this action does not delete any working copies currently in project folders on the workgroup's computers.
- To view the location of working copies on your computer, expand Local Project Files. To open the folder, choose Show Files In Explorer (Windows) or Show Files In Finder (Mac OS). To change the location of the files, click Change Location and choose the new location for working copies.

Note: *Make sure that you use the Change Location feature to relocate working copies, rather than moving the project folder manually in the file system.*

- Click Advanced Administration to enable lock protection, edit or assign users, or require users to log in to the project. When prompted, log in to Version Cue Administration. Depending on your privileges, this option may not be available.

3 Click Cancel to close the Open dialog box (Version Cue saves your settings even though you clicked Cancel).

Share or unshare a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

At any time, you can change a project's shared status. Projects on a Version Cue Workspace that other users can access are shared by default and can't be made private. Note that unsharing a project does not delete any working copies currently in the working copies project folders of your workgroup.

Note: *If the Version Cue Workspace is installed on a computer that uses a firewall and you want to share the workspace with others, make sure that TCP ports 3703 and 427 are left open. If you're using a Windows machine, deselect the Internet Connection Firewall option. (For information on the Internet Connection Firewall option, see Windows Help.)*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS Open dialog box.

2 Click Version Cue in the Favorites panel, and then double-click the host Version Cue Workspace.

3 Select the project, and then do one of the following:

- To share the project, choose Share Project from the Project Tools menu .
- To unshare the project, choose Unshare Project from the Project Tools menu.
- Choose Edit Properties from the Project Tools menu. Select or deselect Share This Project With Others, and click Save. After you edit the project properties, click Cancel to close the Open dialog box (your settings are saved even though you clicked Cancel).

See also

"About the Adobe dialog box" on page 513

"View Version Cue Workspace, project, and file information" on page 516

Working with files in Version Cue

About working copies

Version Cue projects and files reside in the Version Cue Workspace on the host computer. The master copies of files added to the project, including file versions and other file data, such as comments, version dates, and user IDs, are saved on this host computer. When you work in files from a Version Cue project, you're editing a *working* copy of the master file on your computer, not the master file on the Version Cue Workspace, which remains protected and untouched.

As you work, use the Save command to save changes periodically. This command does not create a new version of the master file but updates your working copy. A new version is created only when you choose the Save A Version command. This command first updates the working copy, and then adds a new version to the master file on the Version Cue Workspace. When the working copy of a file matches (is the same version as) the current version in the workspace, the file is *synchronized*.

Using working copies of master files, several people can work with the most recent version of a master file. For example, if two people need access to the same illustration during overlapping periods of time, Version Cue lets each person work with a working copy of the most recent file version. The second person to access the illustration is informed that the file is already in use. At that time, the second person can decide whether to continue working with the file.

Working copies allow you to work on a file even when the host workspace is unavailable, or offline. Though some features, such as versions, can't be used when you're working offline, you can edit files and save your work. When the workspace is online again, you can save a version to update the master file.

There are times when you may wish to delete the working copies of your project files. For example, you may want to free up space on your hard drive, or are completely finished working on the project. Disconnecting from a project deletes the working copies project folder on your hard drive. You can do this at any time if none of the working copies are In Use by you. If you accidentally disconnect from a project, new working copies are recreated the next time you access the project files. If a project is deleted from either the host workspace or your local computer, you can use working copies to recreate the project with the most current versions of the files.

To relocate working copies of a project, edit the project's properties and use the Change Location feature. For instructions, see "Create and edit projects" on page 517.

See also

"Disconnecting from projects" on page 526

"Delete files and folders" on page 527

"Editing and synchronizing offline files" on page 531

"Restore a file or folder deleted from a project" on page 528

"Version Cue file statuses" on page 521

"Availability of Version Cue features" on page 512

File protection in Version Cue

Version Cue automatically informs others that a file is being edited. Version Cue assigns In Use status to a file when you open and edit a file that isn't being edited by another user. When you save a version, Version Cue removes the file's In Use status.

At times two people may need to work with a file simultaneously. For example, User A may begin editing a file but be called away before saving a version. If User B works on the file while User A is away, Version Cue ensures that the two files don't overwrite each other in the project. User A's working copy won't reflect the changes made by User B, and vice versa. When finished with the file, both users can save a new version of the file to the Version Cue Workspace. Version Cue alerts all current users of the file about the presence of a new version in the Version Cue Workspace and gives them the option of downloading the latest version or continuing their current edits. (Version Cue alerts users who have the file open or who reopen a file that was previously closed while In Use.)

You can use the Version Cue Workspace Administration utility to assign lock protection to a Version Cue project. Only the first user to begin editing an available file in a lock-protected project can save the next version of that file to the Version Cue project. Other users who edit that file simultaneously can't save changes to a new version of that file, even after the first user saves a version. These other users must save the changes as completely new files with their own version thread.

See also

"About working copies" on page 520

"Availability of Version Cue features" on page 512

Version Cue file statuses

Files that are managed by Version Cue are always marked with a status icon that describes the state of the file on the Version Cue Workspace. You can view a file's status while browsing the files in a Version Cue project. A file can have more than one status at the same time (in some cases only one status is shown).

Each file status has a corresponding icon:

Open The file is open on your computer. This status lets you make informed decisions about whether it's appropriate, for example, to place a file into a layout while the file is still being edited. The Open status is indicated only for files on your computer.

In Use By Me You are editing the file. Version Cue assigns this status to a file when you make an edit to the file that changes its content.You can manually mark a file In Use before you edit it to indicate to others that you intend to make changes to the content.

Synchronized The latest known version of the file is available for editing and you have a working copy of it on your computer. Version Cue assigns this status when you save a version of the file you're editing, or when you manually synchronize a project.

No Working Copy No local copy of the file exists. This status indicates that it will take a few moments to create a working copy before you can edit the file.

In Use By [user name] Another user is editing the file and has not yet saved a new version.

Conflicted Copies There is a version conflict, or both you and another user are editing the file.

Only Copy The file in the working copies folder is the only copy known to Version Cue and has not been synchronized with the Version Cue Workspace. This scenario can occur when a file has been saved in an existing project for the first time while the workspace is offline. Because the workspace is offline, Version Cue displays the Offline Copy status until the workspace is back online, and then changes the status to Only Copy. Version Cue also displays this status if you drag a file from one folder into the working copies folder using the file system instead of Bridge (not recommended). You can edit the file, but it's important to synchronize (upload the file to the workspace) after you save your changes.

Offline Copy There is a local copy of the file in your working copies folder, but the Version Cue Workspace is offline. There is no way of checking whether the local copy is synchronized with the latest version on the workspace. You can edit an offline copy and save these changes; however, you must save a version or synchronize the file once the workspace comes back online.

Outdated Copy A local copy exists, but there is a newer version of the file in the workspace. This status indicates that it will take a few moments to create an up-to-date working copy before you can edit the file.

Unavailable The Version Cue Workspace is offline or you don't have access privileges. There is no way of checking the status of the local copy with the workspace. You can edit the local copy and save these changes; however, you must save a version or synchronize the file once the workspace comes back online.

Deleted The file or folder has been deleted from the project, but not yet permanently erased. (You can restore a deleted file or folder).

See also

"About working copies" on page 520

"Synchronize files" on page 533

"Edit a file in use by another user" on page 524

"Delete files and folders" on page 527

"Availability of Version Cue features" on page 512

Adding files and folders to a project

To save versions of a file and take advantage of Version Cue file management, you must add or save the file to a Version Cue project. You can add assets such as swatch libraries to projects to share them with your workgroup. You can also add non-Adobe files to Version Cue projects. You can add files using any of the following methods:

- Add files one at a time from within InCopy, an Adobe Creative Suite component, or Acrobat 8.
- Place files directly in the project's working copies folder, and then synchronize the project to add the files. For more information, see "About Version Cue projects" on page 515.

See also

"Create and edit Version Cue projects" on page 538

"Availability of Version Cue features" on page 512

"About the Adobe dialog box" on page 513

"Editing and synchronizing offline files" on page 531

Add a file to a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Open the file.

2 Choose File > Save As. Click Use Adobe Dialog if you're using the OS dialog box.

3 Double-click the host Version Cue Workspace.

4 Double-click the project to open it.

5 Enter a comment for the first version in the Version Comments box, and click Save.

Add files to a project folder

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

You can add files by dragging them into the documents folder of a Version Cue project.

1 Do one of the following:

- Locate the project folder inside the My Documents/Version Cue (Windows) or Documents/Version Cue (Mac OS) folder on your computer.
- If the project folder isn't already in the My Documents/Version Cue (Windows) or Documents/Version Cue (Mac OS) folder on your hard disk, create a new folder inside the Version Cue folder. Give the folder the same name as the existing Version Cue project on the Version Cue Workspace. Inside the new project folder, create a new folder and name it "documents."

Note: *These steps work only if the project already exists. You cannot create a new project using this method.*

2 Move or copy the items you want to add to the documents folder.

3 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

4 Click Version Cue in the Favorites panel. Open the Version Cue Workspace, and select the project.

5 Choose Synchronize from the Project Tools menu . Once the synchronization is complete, the files are added to the project.

Open a file from a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

After you add or save a file to a Version Cue project, the file is automatically managed by Version Cue.

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box, and then click Version Cue in the Favorites panel.

2 Double-click the host Version Cue Workspace.

3 Double-click the project that contains the file you want to open.

4 Select the file and click Open.

See also

"Edit a file in use by another user" on page 524

"Update a file with the most recent version" on page 524

"About the Adobe dialog box" on page 513

"Search for files in a project" on page 525

Edit a file in use by another user

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

If you don't notice that a file's status is In Use when you open it, Version Cue displays an In Use By alert to remind you that someone else is already editing a working copy of the file.

1 Open the file, and click one of the following options when the In Use By alert appears:

No, Close Document Closes the file without any alterations.

Yes, Keep Open Keeps the file open so you can work on the document.

2 If you continue working with the document and make a change to the content, Version Cue displays an alert to remind you that there is the possibility of creating conflicting copies. Click one of the following:

Discard Changes Displays the most recent version of the file from the Version Cue Workspace and discards your changes to the working copy.

Continue Editing Lets you edit the working copy without overwriting the changes made in another user's working copy of the same file (Version Cue will prompt each user to save a new version of the file).

3 If the project doesn't have lock protection applied to it, you can save a new version of your edits. Version Cue displays an alert warning you that conflicting edits will occur if you continue. Click one of the following:

Cancel Returns you to the open document without saving a version.

Save Version Anyway Updates the master file in the Version Cue Workspace with the new version. (Version Cue displays an alert to the other user to note that a newer version of the file has been created by you.)

At any point, you can close the document and discard any changes you've made.

See also

"Update a file with the most recent version" on page 524

Update a file with the most recent version

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

If another user creates a new version of a file that you have open or that is still marked In Use By Me, Version Cue prompts you to update your document with the latest version when you open it or attempt to make changes to it, or when you bring the document window frontmost in a group of documents.

❖ When the prompt appears, click one of the following:

Discard Changes Updates the document with the most recent version from the Version Cue project. You can continue editing the file after it is updated. You lose any changes you've made even if you have already saved those changes to the working copy with a Save command.

Continue Editing Leaves the document as is. You can continue editing the file without overwriting the changes in the more recent version. Instead, you're prompted to either save a new version of the file when you close it, or to discard your changes.

See also

"Edit a file in use by another user" on page 524

Save changes to a file

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

If you want to save changes, but you aren't ready to save a new version as you edit a file you have opened from a Version Cue project, you can use the File > Save command to save your changes to the working copy on your computer. Until you save a new version to the shared Version Cue Workspace, these changes won't be available to any other user. You can also close the file once you save changes to a file, and then reopen it and save a version later.

❖ To save changes to your working copy, choose File > Save.

Search for files in a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

Metadata is automatically added to Version Cue project files as you work with them. You can quickly locate files in a Version Cue project by searching for specific information such as titles, authors, copyright data, keywords, dates, and locations. The search feature searches through existing files, as well as files deleted from projects.

1 Choose File > Open.

2 If the button is visible, click Use Adobe Dialog (if you see the Use OS Dialog button instead, you are already using the Adobe dialog box).

3 Click Version Cue in the Favorites panel.

4 Double-click the host Version Cue Workspace.

5 Double-click the project you want to search.

6 Click Project Search .

7 Enter information in Project Search.

If you open an older version of a file found as the result of a search, the filename will be prefaced with "Version <X> -".

Note: *It is best to treat older versions as view-only when opened as the result of a search. Although you can edit an older version in its native application, do so only if you intend for this version to become a separate asset. To edit a previous version, first promote it to the new, current version, and then make changes.*

See also

"About the Adobe dialog box" on page 513

"Version Cue file statuses" on page 521

"View and compare versions" on page 530

Disconnecting from projects

Disconnecting from projects

Disconnecting from a project erases the working copies of files on your computer while leaving the master copies on the Version Cue Workspace intact. Disconnecting also removes shortcuts to the project from the Adobe dialog box. You may want to disconnect to free up more space on your hard drive. Or, you might disconnect from a project if someone else in your workgroup deletes a project from the Version Cue Workspace (your working copies are not touched by that deletion).

As long as you have saved a version of the working copies there is no harm in discarding them by disconnecting. When you access the project again, new working copies will be created for the current versions of the files you open. If you have working copies with the In Use By Me status, you will not be permitted to disconnect from a project until you have saved a version of those files.

When you disconnect from a project, only the working copies and shortcuts on your computer are erased. Leaving the project intact on the workspace allows others, as well as yourself, to access the master files. When you delete a project, all working copies and shortcuts on your own computer, along with the master copies of files and folders in the Version Cue Workspace, are erased. However, any working copies and shortcuts on other computers your co-workers or you previously used to access the project are not erased. To completely remove the project and erase those working copies and shortcuts, you must select the shortcut or project folder and disconnect, even though the project has already been deleted.

See also

"Delete files and folders" on page 527

"Disconnect from a project" on page 526

"About working copies" on page 520

"Availability of Version Cue features" on page 512

Disconnect from a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

Disconnecting from a project removes the files from your computer but doesn't delete the project from the host Version Cue Workspace.

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Open the Version Cue Workspace and select the project from which you want to disconnect.

4 Choose Disconnect from the Project Tools menu.

Note: *You can select any project icon or shortcut to the project when you want to disconnect.*

Deleting files, folders, and projects

Delete files and folders

Deleting a file or folder from Version Cue is a two-step process that safeguards against accidental deletions. The first step is deleting the file or folder and giving it the Deleted status. Deleting hides the file or folder from normal view but does not erase it. The second step is permanently deleting and erasing the file or folder and its previous versions.

When you delete a folder, the folder and all folders and files nested inside it are hidden and given a Deleted status. When you permanently delete a folder, its entire contents are erased.

Any user with appropriate privileges can delete files and folders unless the files or folders are marked In Use. In a workgroup, if a user is editing a file that you need to delete, you can reset the file's lock by using the Version Cue Administration utility.

You can restore files or folders that have a Deleted status. Restoring reinstates Version Cue management. Restored files and folders appear in their previous location in the project folder hierarchy. (Deleted files and folders maintain their relationship within the project hierarchy until they are permanently deleted.)

You can show hidden and deleted files or folders, and view them in search results. Additionally, Version Cue has a Project Trash view from which you can view all deleted files in a project. Use Project Trash to view and handle all deleted files without navigating through the project folder hierarchy.

See also

"About working copies" on page 520

"Manage Version Cue projects" on page 541

"Availability of Version Cue features" on page 512

"View Version Cue Workspace, project, and file information" on page 516

Delete files or folders from a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Double-click the host Version Cue Workspace.

4 Double-click the project that contains the file or folder you want to delete.

5 Select the file or folder you want to delete.

6 Do one of the following:

- Choose Delete from the Project Tools menu 
- Click the Delete icon .

Note: *If Show Deleted Items is not selected in the Project Tools menu, the file will become hidden and removed from view. If Show Deleted Items is selected, the file or folder will remain visible with the status Deleted.*

Delete a file or folder permanently

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Open the Version Cue Workspace and project that contains the file or folder you want to delete permanently.

4 Choose Show Deleted Items from the Project Tools menu.

5 Select the file or folder you want to permanently delete, and choose Delete Permanent from the Project Tools menu.

6 Click OK.

Delete a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

Deleting a project from Version Cue permanently erases all of its master files (including versions) and folders from the Version Cue Workspace. This is a one-step process (with confirmation). Deleting a project automatically deletes the working copies of files on your computer as well as any shortcuts to that project. However, the working copies of files created on other users' computers are not deleted until they disconnect from the deleted project. You cannot restore deleted projects directly in Version Cue, nor can you delete a project if any user has files that are marked In Use.

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Do one of the following:

- Double-click the host Version Cue Workspace and select the project.
- Click the project shortcut.

4 Choose Delete from the Project Tools menu.

5 Click OK in the confirmation dialog box.

You can also delete projects using the Version Cue Administration utility.

See also

"Manage Version Cue projects" on page 541

"Disconnect from a project" on page 526

"About the Adobe dialog box" on page 513

Restore a file or folder deleted from a project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Double-click the host Version Cue Workspace.

4 Double-click the project that contains the file or folder you want to restore and do one of the following:

- Click Project Trash in the Favorites panel, select the file you want to restore, and choose Restore from the Project Tools menu .
- Choose Show Deleted Items from the Project Tools menu (deleted file and folder names appear in gray in the dialog box). Select the file or folder you want to restore, and choose Restore from the Project Tools menu.

5 Choose Refresh from the Project Tools menu to update the dialog box.

The file or folder is restored to its original location in the Version Cue project.

Note: *To restore a file in a previously deleted folder, you must first restore the folder. Doing so restores the folder and all its contents.*

Version Cue versions

About Version Cue versions

Versions provide a convenient method of retaining work that was performed in different stages. At any point in your design process, you can save a version of the file, which Version Cue saves and tracks. Each version is a snapshot of the file. You can use versions to review ideas or changes with team members or a client before selecting a final version, or to recover from destructive changes.

Version Cue prevents users from overwriting each other's work. With this protection capability, multiple users can work on a file simultaneously. When more than one user is working on a file, Version Cue alerts them all when one user saves a new version, allowing everyone to update the file and work in the latest version.

You don't have to save a version every time you save your changes. Using the File > Save command works the same way in Version Cue-managed files as in non-Version Cue files. You need only save a version when you want to create a snapshot of the file. Instead of choosing File > Save As and saving a new copy of a design, you save a version, which allows you to track changes as they occur.

If you want to continue your work using a previous version instead of the current version, promote the previous version to the next current version (do this instead of opening the previous version directly). This process keeps the previous version intact, should you decide to return to it again in the future. If you want a previous version, along with the current version, to be available for use in a project, you can save the previous version as a separate asset.

You can view previous versions in their native applications. When you no longer need to keep previous versions of files, you can delete them individually or in batches.

See also

"View and compare versions" on page 530

"Availability of Version Cue features" on page 512

Save a version

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

To save a new version of a file, you use the Save A Version command, which saves your changes to the Version Cue Workspace.

1 Choose File > Save A Version.

2 In the Save A Version dialog box, enter comments you want to associate with this version.

3 Click Save.

View and compare versions

Versions are always available for you to view and compare. The Versions dialog box displays thumbnails of all file versions alongside comments, dates, and the login name of the user who created the version. Each version is numbered sequentially. You can view any version at any time. You can also *promote* a version, that is, make a previous version the current one. You can also delete versions if they are irrelevant or if you need to save disk space. When you delete older versions, the version numbers of the remaining versions remain the same.

The commenting features of Version Cue maintain a descriptive history of files. Each time you save or promote a version, you can describe what changes you made. This history helps you track changes made at different stages. Also, your version comments are searchable; you can search for a particular word to find a version quickly.

See also

"Availability of Version Cue features" on page 512

"About the Adobe dialog box" on page 513

View versions

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Double-click the host Version Cue Workspace. Double-click the project to open it.

4 Click the name of the file whose versions you want to view.

5 Choose Versions from the Project Tools menu .

6 In the Versions dialog box, do any of the following:

- To create a new file version from an older version, select the version and click Promote To Current Version.
- To open an earlier version in its own window and view details only or create a separate asset from the earlier version, click View Version. The version number appears in the file's title bar to remind you that you shouldn't edit it.
- To delete a version, select the version and click Delete.

View a previous version in its native application

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

❖ In the Versions dialog box, click the version you want to open and click View Version.

Note: *The file status is Never Saved, because the previous version is only a snapshot of a previous stage of a file.*

Version Cue opens the previous version in its own window. You can then edit the previous version and save it as a new asset. If you edit the previous version, your changes won't be reflected in the current version unless you promote the earlier version.

Promote a version

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

Promoting a previous version automatically saves a copy of that previous version as the current version. Any changes made between its creation and promotion don't appear in the new current version.

1 In the Versions dialog box, select the version you want to promote, and click Promote To Current Version.

2 Type a version comment in the Save A Version dialog box. Then click Continue to complete the promotion.

Delete a version

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

❖ In the Versions dialog box, click the version you want to delete and click Delete. To delete multiple versions, Shift-click/Control-click the versions and click Delete. When prompted, confirm the deletion.

Note that the remaining versions are not renumbered.

Using the Version Cue Administration utility, you can delete multiple previous versions of all files in a project simultaneously. By using this method, you can retain past versions by date or by number of versions to keep. See "About the Version Cue Administration utility" on page 533.

See also

"Manage Version Cue projects" on page 541

"Create and edit Version Cue projects" on page 538

Editing and synchronizing offline files

Editing and synchronizing offline files

When you need to work on files from a Version Cue project while the Version Cue Workspace is unavailable on the network, you can edit working copies on your computer. When the Version Cue Workspace is available again, you must *synchronize* your files with the workspace to save your latest version to the Version Cue Workspace. You can synchronize an entire project, just a folder in the project, or a selected file.

Working copies are normally copied on your computer when you open a project from an online workspace. However, if you haven't yet edited the file, you can prepare to work offline by synchronizing the entire Version Cue project, or just the files you need, while the workspace is still online to ensure that you have working copies.

When you are working offline, you can't create multiple versions because the Save A Version command is unavailable.

In Version Cue, if you intend to work on a file offline, you can manually mark the file In Use before you take your work offline. When you mark a file In Use, Version Cue creates a working copy of the file for you. When a file's status is In Use, Version Cue protects the file. When you synchronize your file, the status of the file returns to Synchronized.

See also

"Availability of Version Cue features" on page 512

Manually mark a file as In Use

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Version Cue in the Favorites panel, and then navigate to the file. Select one or more files. Right-click/Control-click a file, and then choose Mark In Use.

2 When you finish editing the file offline and the Version Cue workspace is again available, synchronize the file. Version Cue automatically creates a new version of the file. If the workspace becomes available while you still have the file open, simply save a version.

If you haven't made any changes, you can manually cancel the In Use By Me status, by choosing Cancel Mark In Use from the context menu.

See also

"Synchronize files" on page 533

Edit working copies of files from an offline project

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Double-click the host Version Cue Workspace.

4 Double-click the Version Cue project that contains the file. It may take Version Cue a few seconds to verify that a Version Cue Workspace or project is unavailable.

5 Double-click a file to open it (the Offline Copy status allows you to open the file).

6 When you finish editing the file, choose File > Save As to save the changes to the working copy. When the Version Cue Workspace becomes available again, synchronize your files.

See also

"Editing and synchronizing offline files" on page 531

"Synchronize files" on page 533

Synchronize files

Note: *You can perform this task only if you have access to the full Version Cue feature set, available in Adobe Creative Suite or in a shared workspace. See "Availability of Version Cue features" on page 512 for more information.*

1 Choose File > Open. Click Use Adobe Dialog if you're using the OS dialog box.

2 Click Version Cue in the Favorites panel.

3 Select the project that contains the master file, and do one of the following:

- To synchronize the entire project, choose Synchronize from the Project Tools menu .
- To synchronize just a folder or one or more files, open the project, select the folder or files that you want to synchronize, and choose Synchronize from the Project Tools menu.

4 If the master file on the Version Cue Workspace is newer than your working copy and you've edited the working copy, a File Conflict dialog box appears. Specify one or more of the following:

Apply The Following Action To All Subsequent Conflicts Automatically applies the selected option every time there is a file conflict.

Save a Version Saves your working copy as a new file version to the Version Cue Workspace.

Skip This File Prevents the most recent version from the Version Cue Workspace from being downloaded. (This option also prevents a version of your working copy from being saved to the workspace.) Choose this option only if you want to keep your edits and disregard the other changes in the master file.

The Version Cue Administration utility

About the Version Cue Administration utility

Using the Version Cue Administration utility, you can do more advanced tasks that affect a specified project or an entire Version Cue Workspace. You have access to the Version Cue Administration utility if you use Adobe Creative Suite or if you have access to a shared project and that project's owner has granted you access permission to the Administration utility.

The following table lists the Version Cue-related tasks that you can accomplish through Adobe Creative Suite components or Acrobat and those that you can accomplish through the Version Cue Administration utility.

Task	Acrobat or Adobe Creative Suite component	Version Cue Administration
Create, edit, and delete Version Cue projects	Yes	Yes
Share a project with anyone who is using Acrobat, Adobe Creative Suite, an Adobe Creative Suite component, or a WebDAV-enabled application	Yes	Yes
Delete a file version	Yes	Yes
Delete multiple file versions at once	Yes	Yes

Task	Acrobat or Adobe Creative Suite component	Version Cue Administration
Create Version Cue projects from remote files via FTP	No	Yes
Create Version Cue projects from remote files via WebDAV	No	Yes
Import Version Cue 1.0 projects	No	Yes
Back up Version Cue projects and restore backup versions of a project	No	Yes
View the amount of disk space a project uses, its lock protection status, its creator, and its creation date	No	Yes
Duplicate or export Version Cue projects	No	Yes
Edit Version Cue Workspace preferences	No	Yes
Add and edit users, and define their project privileges	No	Yes
Change the properties of a Version Cue project to require users to log in before accessing it	No	Yes
View all users and their privileges for all projects in the Version Cue Workspace	No	Yes
Remove all In Use locks in a project or those created by a specified user	No	Yes
View Version Cue Workspace logs and reports	No	Yes
Add files to an existing project	Yes	No
Create file versions	Yes	No
View file comments and other information	Yes	No
Search for files using file information (metadata)	Yes	No
Initiate and manage a web-based review of PDF files in Version Cue projects	No	Yes

Log in to and out of the Version Cue Administration utility

When you install Version Cue on your computer, Version Cue automatically creates a default user login ID with administrator privileges. You should change the password for this default user login, as it is publicly available for initial installation and setup. Until you change the default password, the default user login ID can only be used directly from the computer the Version Cue workspace is located on, not across a network. If Version Cue is installed on your computer, you can start using the web-based Version Cue Administration utility with the Version Cue default login ID (system) and password (system).

Users working in a group with a login ID and password can log in to the Version Cue Administration utility. The tasks that workgroup users can perform are limited by the privileges assigned to their Version Cue login ID by the administrator. However, users whose access level is set to None can't log in to the Version Cue Administration utility.

You can display the Version Cue Administration login web page in the following ways:

- By opening the Version Cue preferences and clicking the Advanced Administration button.
- By clicking the Advanced Administration button in an Adobe Creative Suite component or in Acrobat 8.
- By typing the IP address of the Version Cue Workspace directly into a web browser.
- By selecting Advanced Administration from the Version Cue system tray icon (Windows) or the Version Cue menu (Mac OS).

See also

"Choosing user privileges" on page 546

Log in to Version Cue Administration from an Adobe Creative Suite component or from Acrobat 8

1 Choose File > Open, and click Use Adobe Dialog.

2 Select the Version Cue Workspace you want to administer.

3 Choose Edit Properties from the Tools menu .

4 Click Advanced Administration in the Edit Properties dialog box.

5 Type your assigned Version Cue login ID and password in the text boxes. (The default for both the ID and password is "system.")

6 Click Log In.

Log in to Version Cue Administration from a web browser

1 In a web browser, type the IP or DNS address of the computer on which the Version Cue Workspace is installed. Precede the address with http:// and follow it with a colon and the port number—for example, http://153.32.235.230:3703 (IP) or http://*myserver.mycompany.com*:3703 (DNS). The default port number is 3703.

Note: *If you have Version Cue 1.0 installed on your computer, the default port number for Version Cue 2.0 is 50800. Once Version Cue 1.0 is uninstalled, Version Cue 2.0 defaults to 3703.*

2 A browser window displays the Adobe Version Cue Administration login page. Type your assigned Version Cue login ID and password in the text boxes. (The default for both the ID and password is "system.")

3 Click Log In.

Log in to Version Cue Administration from the Version Cue Preferences dialog box

1 Do one of the following:

- (Windows) Double-click the Version Cue icon in the system tray and click Advanced Administration.
- (Windows) Right-click the Version Cue icon in the system tray and then choose Version Cue CS2 Preferences.



On Windows, double-click the Version Cue icon to open preferences dialog box.

- (Mac OS) Click the Version Cue icon at the top of the screen, and then choose Advanced Administration from the menu.
- (Mac OS) Control-click the Version Cue icon and choose Version Cue CS2 Preferences.

2 Type your assigned Version Cue login ID and password in the text boxes. (The default for both the ID and password is "system.")

3 Click Log In.

Log out of Version Cue Administration

❖ Click Log Off at the top of the page.

About Version Cue Administration integrity checks

Each time the Version Cue Workspace restarts, it performs an integrity check and performs repairs if necessary. To ensure best performance, restart the Version Cue Workspace periodically so it can perform the integrity check and self-repair.

Set Version Cue Workspace Administration preferences

1 Log in to the Version Cue Administration utility.

2 Do one of the following:

- Click the Advanced tab, and then click Preferences.
- On the Home page, click Perform Advanced Tasks, and then click Preferences.

3 Set any of the following options:

Workspace Name To change the Version Cue Workspace name, type a name in the text box. This name identifies the Version Cue Workspace in Acrobat or in Adobe Creative Suite components using Version Cue.

Make This Version Cue Workspace Visible To Others. When selected, gives other computers access to the Version Cue Workspace.

Note: *If the Version Cue Workspace is installed on a Windows computer that uses a firewall and you want to share the workspace with others, make sure that TCP ports 3703 and 427 are left open and deselect the Internet Connection Firewall option (see Windows Help).*

Only Grant Access To Existing Users Specifies whether Version Cue projects are available to a user. Make sure to set access properties for each desired project and to edit the project's list of assigned users.

Log Level Defines the amount of information in reports generated by the Version Cue Workspace system. Choose a log level: Error to list only Version Cue Workspace errors; Warning to list workspace errors and warnings; or Info to list errors, warnings, and information about tasks performed.

Log Size Sets the maximum size, in kilobytes, for a system report. To reduce the log file size by saving it as a compressed GZ file, select Compress Log File.

FTP Proxy Specifies the default FTP Proxy server for users importing projects from or exporting projects to an FTP server, or publishing with GoLive to an FTP server.

HTTP Proxy Specifies the default HTTP Proxy server for users importing projects from or exporting projects to a WebDAV server, or publishing with GoLive to a WebDAV server.

Color Scheme Sets the background colors of the tabs.

4 Click Save, and then restart Version Cue Administration.

Migrate from Version Cue 1.0 to Version Cue 2.0

If you currently use Version Cue 1.0, you need to migrate your projects and user data to Version Cue 2.0. Keep the following in mind:

- Version Cue 1.0 and Version Cue 2.0 Workspaces can be installed and function on the same computer (using different ports) simultaneously.
- If Version Cue 1.0 and Version Cue 2.0 Workspaces are installed on the same computer, Adobe Creative Suite 1.0 components and Acrobat 7 work only with the Version Cue 1.0 Workspace, because they can communicate only with the port that the Version Cue 1.0 Workspace uses.

Note: *If you uninstall the Version Cue 1.0 Workspace and then restart the Version Cue 2.0 Workspace, the Version Cue 2.0 Workspace then uses the Version Cue 1.0 Workspace's port, allowing Adobe Creative Suite 1.0 components, Adobe Creative Suite 2.0 components, and Acrobat 7 and 8 to work with the Version Cue 2.0 Workspace.*

- If only the Version Cue 2.0 Workspace is installed, Adobe Creative Suite 1.0 components and Acrobat 7 will work with it.
- Adobe Creative Suite 2.0 components and Acrobat 8 work only with Version Cue 2.0 Workspaces.
- Adobe Creative Suite 1.0 components and Acrobat 7 work with both Version Cue 1.0 and Version Cue 2.0 Workspaces simultaneously as long as the workspaces are not located on the same computer.
- You can import Version Cue 1.0 projects and users using the Version Cue Administration utility.

1 After installing Version Cue 2.0, restart the Version Cue 1.0 Workspace. This activates a migration plug-in.

2 Log in to the Version Cue Administration utility.

3 Click the Advanced tab, and then click Import Version Cue 1.0 Data.

4 Select the data you'd like to migrate to Version Cue 2.0:

- Projects and users. Click Next. Select the check box next to the names of any projects you want to import, and click Next. Then, select the check box next to the names of any users you want to import, and click Next.
- Only projects. Click Next. Then, select the individual projects you want to import, and choose whether to import all the users assigned to those projects (at this point, you cannot select individual users; you must import either all users or no users). Click Next. If you choose to import the users, select the users you want to import, and click Next.
- Only users. Click Next, and, in the next page, select the check box next to the names of any users you want to import.

5 When the migration process is complete, verify the information you're importing, and confirm the migration.

6 Uninstall Version Cue 1.0.

7 Restart the Version Cue 2.0 Workspace. This step resets the port to allow access from both Acrobat 7 and 8, Adobe Creative Suite 1.0, and Adobe Creative Suite 2.0 components.

Creating, editing, and managing projects in Version Cue Administration

Create and edit Version Cue projects

You can create a new blank Version Cue project, a project from the files in a folder on the computer where the Version Cue Server is installed, or a project from a WebDAV or FTP server.

See also

"Back up and restore projects" on page 543

Create a new blank Version Cue project

1 Do one of the following:

- On the Home tab, click Create A Project.
- Click the Projects tab, and then click New.

2 In the New Project content frame, click Blank Project to create an empty Version Cue project. Click Next to display the Create Blank Project content frame.

3 Type a name for your project in the Project Name box.

4 To specify how to treat the imported content's URL encoding, choose an option from the URL Encoding menu.

5 Set any of the following options:

Share This Project With Others Gives other users access to the project. Users can be on your subnetwork, or they can be given the Version Cue Workspace IP or DNS address and port number to gain access to the Version Cue Workspace.

Require Login For This Project Ensures that only users with a Version Cue login ID and password have access to the project.

Enable Lock Protection For This Project Restricts file versioning to sequential versions.

URL Encoding Specifies how the content's URL encoding is treated. UTF-8 is the default setting.

%HH Escaping Requires that a nonsafe character be encoded as a percent symbol (%) followed by two hexadecimal digits.

6 Click Save.

7 If you chose to require login, do any of the following in the User Privileges content frame, and then click Save:

- Choose an option next to each user name in the Privileges column or choose an option from the Set All To menu to define each user's access. These options won't work unless you select Require Login For This Project.
- To let a user publish the project with GoLive CS2 to a specified FTP or WebDAV server, select the check box in the Publishing Privilege column next to the user name.

Create a new Version Cue project from a folder

You can create a Version Cue project from the files in a folder on the computer where the Version Cue Workspace is installed.

1 Log in to Version Cue Administration.

2 Do one of the following:

- On the Home tab, click Create A Project.
- Click the Projects tab, and then click New.

3 In the New Project content frame, click Import From Folder.

4 If the content you're importing is a website, select Import Folder As A Website to import the content to the project's web-content folder. To specify the folder to import from, click Browse and select any file in the folder; then click Open. Alternatively, you can type the path to the desired Version Cue Workspace folder in the text box.

5 Type a name for your project in the Project Name box.

6 Set any of the following options:

Share This Project With Others Gives other users access to the project. Users can be on your subnetwork, or they can be given the Version Cue Workspace IP or DNS address and port number to gain access to the workspace.

Require Login For This Project Ensures that only users with a Version Cue login ID and password have access to the project. Note that if you select this option after a user gains access, the user can still gain access without logging in. Make sure that you change privileges as needed in the project's list of users.

Enable Lock Protection For This Project Restricts file versioning to sequential versions.

Comments Stores any remarks you type about the project.

URL Encoding Specifies how the content's URL encoding is treated. UTF-8 is the default setting.

%HH Escaping Requires that a nonsafe character be encoded as a percent symbol (%) followed by two hexadecimal digits.

7 Do any of the following in the Assigned Users content frame, and then click Save:

- To define each user's access to the project, choose an option next to each user name in the Privileges column or choose an option from the Set All To menu. These options won't work unless you select Require Login For This Project.
- To let a user publish the project with GoLive CS to a specified FTP or WebDAV server, select the check box in the Publishing Privilege column next to the user name.

Create a new Version Cue project from a WebDAV server or FTP server

1 Log in to Version Cue Administration.

2 Do one of the following:

- On the Home tab, click Create A Project.
- Click the Projects tab, and then click New.

3 In the New Project content frame, do one of the following:

- Click Import From WebDAV Server.
- Click Import From FTP Server.

4 If the content you're importing is a website, select Import FTP/WebDAV As A Website to import the content to the project's web-content folder.

- In the FTP Server or WebDAV Server box, specify the WebDAV server from which to import files, and type the port number in the Port box.
- To specify a folder, type its path in the Directory box.
- If a user name and password are required to access the server, type that information in the User Name and Password boxes.
- To use a proxy server to connect to the server, select Proxy.

5 Type a name for your project in the Project Name box.

6 To specify how to treat the imported content's URL encoding, choose an option from the URL Encoding menu.

7 To comply with the URL syntax requiring nonsafe characters to be encoded as a percent symbol (%) followed by two hexadecimal digits, select %HH Escaping.

8 Do any of the following and then click Next:

- To give other Version Cue or WebDAV users access to the project, select Share This Project With Others. (Users must either be on your subnetwork or be given the Version Cue Workspace IP or DNS address and port number.)
- To require users to log in with a Version Cue login ID and password before accessing the project, select Require Login For This Project. If selected, this option ensures that only Version Cue users you specify can log in and access the project.

Note: *If you select this option after other users have already accessed the project without being authenticated, those users can still access the project without logging into it. Make sure that you change their privileges as needed in the project's list of assigned users.*

- To restrict file versioning to sequential versions, select Enable Lock Protection For This Project.
- To include remarks regarding the project, type them in the Comments box.

9 Do any of the following in the User Privileges content frame, and then click Save:

- To define each user's access to the project, choose an option next to each user name in the Privileges column or choose an option from the Set All To menu.
- To let a user publish the project with GoLive to a specified FTP or WebDAV server, select the check box in the Publishing Privilege column next to the user name.

Note: *You don't need to assign users in order to give others access to your Version Cue project. Just make sure to deselect Require Login For This Project in the project properties.*

Edit Version Cue project properties

1 Log in to the Version Cue Administration utility.

2 Click the Projects tab, and then click a project name.

3 Set any of the following options:

Share This Project With Others Gives other users access to the project. Users can be on your subnetwork, or be given the Version Cue Workspace IP or DNS address and port number.

Require Login For This Project Ensures that only users with a Version Cue login ID and password have access to the project. Note that if you select this option after a user gains access, the user can still gain access without logging in. Make sure that you change privileges as needed in the project's list of users.

Enable Lock Protection For This Project Restricts file versioning to sequential versions.

Comments Stores any remarks you type about the project.

Backup Configuration Allows you to back up your project or edit backup settings.

4 Click Save, or click Reset to return the properties to their original values.

Manage Version Cue projects

You can duplicate or delete Version Cue projects in the Version Cue Administration utility, as well as remove file locks and delete file versions.

Duplicate a project to start a new project with the same users and privileges. Version Cue duplicates the folder hierarchy within the project structure, and you can use that as a basis for the new project. Delete any files from the duplicated project that are no longer necessary.

A user with system administrator privileges or with project-specific administer privileges can remove file locks. Removing file locks forces the removal of the In Use status of files designated by specific project or by users throughout all the projects.

Delete file versions to improve performance. Each time you save a file version, the version is stored on the Version Cue Workspace database. This database creates a file version history that lets you quickly return to any former state of the file. Although a version history is useful, an extensive history takes up a lot of disk space and can degrade the performance of the Version Cue Workspace.

Duplicate a Version Cue project

1 Log in to the Version Cue Administration utility.

2 Click the Projects tab.

3 Select the check box next to the name of the project, and click Duplicate.

4 In the Duplicate Project content frame, type a unique name for the project.

5 Edit the project properties.

6 Click Duplicate.

Delete a Version Cue project in the Version Cue Administration utility

1 Log in to the Version Cue Administration utility.

2 Click the Projects tab, and do one of the following:

- To delete one or more projects, select the check box next to the name of each project you want to delete.
- To delete all listed projects, select the check box next to the Project Name column label.

3 Click Delete. The Delete Project content frame appears. Click Delete again, or click Cancel to cancel the deletion.

Remove file locks from a Version Cue project

1 Log in to the Version Cue Workspace Administration utility.

2 Click the Advanced tab , and then click Reset Locks (under Maintenance).

3 Do any of the following:

- Choose a project from the Project Name menu.
- Choose a user from the User Name menu.

4 Click Reset Locks to remove the specified file locks.

Delete file versions in a project

1 Log in to the Version Cue Workspace Administration page.

2 Click the Advanced tab , and then click Remove Old Versions.

3 Choose a project from the Project Name menu.

4 To delete versions, select Delete All Versions Older Than, and then choose a month, day, and year.

5 To specify the maximum number of versions to remain in the workspace after you click Delete, select Number Of Versions To Keep, and then type a number in the text box.

6 Click Delete.

Export Version Cue projects

You can export the most recent version of all project files from the Version Cue Workspace. You can use this export to move these files from one host computer (or server) to another or to create a package of the most recent files for output or simply to create an archive of the final versions. Version Cue still manages projects moved between computers.

If you want to move a project, you should decide whether to back it up (so that all past versions are also moved) or export (so that only the current versions of project files are moved). For more information about backing up a project, see "Back up and restore projects" on page 543.

Export a Version Cue project to your computer

1 Log in to the Version Cue Administration utility.

2 Do one of the following:

- Click the Projects tab. Select the check box next to the project you want to export, and click Export.
- Click the Advanced tab, and then click Export Project. The Export Project content frame appears. Select the project you want to export from the Project Name menu.

3 In the Export Project page, choose the name of the project you want to export, and then choose File from the Protocol menu.

4 Click Browse, and specify the folder to which you want to export the project. Select any file in the folder, and click Open.

5 Click Export.

Export a Version Cue project to an FTP or WebDAV server

1 Log in to the Version Cue Administration utility.

2 Do one of the following:

- Click the Projects tab. Select the check box next to the project you want to export, and click Export.
- Click the Advanced tab, and then click Export Project. The Export Project content frame appears. Choose the project you want to export from the Project Name menu.

3 In the Export Project page, choose the name of the project you want to export and then choose either FTP or WebDAV from the Protocol menu.

4 Specify the FTP or WebDAV server address in the Server Address text box. You don't need to precede the address with the chosen protocol. If you want, you can change the default port number in the Port box.

5 To specify a folder, type its path in the Directory box.

6 If a user name and password are required to access the server, type that information in the User Name and Password boxes.

7 To use a proxy server to connect to the server, select Proxy.

8 If you are connecting to the server through a firewall, or if you specified a port other than 21, select Use Passive Mode. (This is an option only if you choose FTP in the Protocol menu.)

9 Click Export.

Back up and restore projects

The Version Cue Administration utility creates backups of all the information in a Version Cue project. Project backups are stored on the Version Cue file system, in the Backups folder. You can then easily restore a backup copy that represents a Version Cue project as it was on a specific date. Restored project backups do not replace the original Version Cue project; restored projects are given different project names. You can use a project backup to move a project from one Version Cue Workspace to another while retaining all the versions of that project.

You can customize a backup configuration for your projects. You can back up a project using a new configuration or an existing configuration. A backup configuration includes the ability to schedule a recurring backup for the project.

It's important to back up projects in a Version Cue Workspace from time to time. Rather than doing this project by project, you can instead back up the complete Version Cue Workspace. You can also use this backup to move a complete workspace from one computer to another. If you restore a backup copy of the Version Cue Workspace, all current data on the workspace, including Version Cue projects, files, and versions, is replaced by the backup. Workspace backup files are saved to the default Backups folder in the Version Cue application folder.

To replace current projects on a Version Cue Workspace with a previous version, you first restore the backup. When you do this, Version Cue Administration turns off automatically. You must restart Version Cue on the host workspace; it cannot be done remotely.

See also

"Create and edit Version Cue projects" on page 538

Back up a Version Cue project

The backup configuration used to back up a project is set in the Version Cue project preferences.

1 Log in to the Version Cue Administration utility.

2 Click the Projects tab.

3 Select the check box next to the project name, and then click Backup.

4 In the Backup Name text box, accept the name, or type a new name.

5 Choose the project components you want to back up: Files (which is always selected), Project File Versions to back up all versions of the files, Project Metadata to back up embedded information entered in Acrobat or Adobe Creative Suite components, and Users/User Assignments to back up information about the users and their project privileges.

6 Click Backup. When the backup is complete, a status page appears.

Restore a Version Cue project backup copy

1 Log in to the Version Cue Administration utility.

2 Click the Projects tab.

3 Click Backup List.

4 Click the name of the backup that you want to restore.

5 In the New Project Name box, type a name that is different from those of other projects in the Version Cue Workspace.

6 Do any of the following, and then click Restore:

- To retain the list of users that were assigned to the project, select Restore Users.
- To retain the same privileges for each assigned user, select Restore User Assignments.
- To add remarks, type them in the Comments box.

Create a new backup configuration

New backup configurations are created in the project's preferences. When you create a new configuration, it becomes the default for the project.

1 Log in to the Version Cue Administration utility.

2 Click the Projects tab.

3 Select the name of the project for which you want to create a new backup configuration.

4 Under Backup Configurations on the Edit Properties page, click New.

5 Type a name for the backup configuration in the Configuration Name box.

6 Select what you want to back up in the Include list of options: Files (which is always selected), Project File Versions to back up all the versions of the project, Project Metadata to back up embedded information entered in Acrobat or Adobe Creative Suite components, and Users/User Assignments to back up information about the users and their project privileges.

7 (Optional) Add remarks to the backup file in the Comments box.

8 Choose an option from the Repeat menu if you want backups to occur automatically (choose Don't Repeat if you want to back up the project manually).

9 Click Save to save the new configuration and to see a list of backup configurations.

Back up all data in the Version Cue Workspace

1 Log in to the Version Cue Administration utility.

2 Click the Advanced tab , and then click Backup Version Cue Data.

3 To add remarks about the workspace backup, type them in the Comments box.

4 Click Save. After the backup is complete, click OK to view the list of workspace backups.

Replace a project with a previous backup

1 Log in to the Version Cue Administration utility.

2 Click the Advanced tab, and then click Administer Backups.

3 Click the name of the backup you want to restore. Click Restore. The Version Cue Workspace turns off. Close the browser. (Notice that the Version Cue icon in the system tray indicates that it's off .)

4 Turn on the Version Cue Workspace.

5 Log in to the Version Cue Administration utility.

Working with users and privileges

Create and edit users

All users with a Version Cue user name and login (except those whose access level is set to None) can log in to the Version Cue Workspace Administration utility. However, the tasks they can perform are limited by the privileges assigned to their user names.

To restrict the Version Cue projects that a user can access, you can edit the project's existing user names. Or, to restrict access further, you can create new Version Cue user names and assign them to a specific project. Creating new names gives you the most control over a project.

Note: *Only users who have system administrator privileges can create new user names.*

If you've configured the Version Cue Workspace to be visible to others in the Version Cue Administration utility, you don't need to create and assign Version Cue user names to let other Adobe Creative Suite, Acrobat, or WebDAV users access your Version Cue projects and the Version Cue Workspace. The users simply need either to be on your subnetwork or be given the Version Cue Workspace IP or DNS address and port number. After a user accesses the Version Cue Workspace without using a Version Cue user name, the user name for the user's own computer is automatically added to the list of users in the Version Cue Workspace, and the password is left blank.

If you've configured the Version Cue Workspace so it grants access only to existing users, you'll need to create Version Cue user names to let other Adobe Creative Suite, Acrobat, or WebDAV users access your Version Cue projects and the Version Cue Workspace.

Create new Version Cue user names

1 Log in to the Version Cue Administration utility.

2 Do one of the following:

- From the Home page, click Add A User.
- Click the Users tab, and then click New in the content frame.

3 In the New User content frame, choose the level of access to give the user from the Admin Access Level menu:

None Denies the user access to the Version Cue Workspace Administration utility; however, the user can access Version Cue projects while working in an Adobe Create Suite component or in Acrobat.

User Gives the user access to some administrator privileges, such as viewing other users' information, creating new projects, and backing up and restoring projects.

System Administrator Grants the user all privileges.

4 Type the user's name in the User Name box.

5 Type a unique login in the Login box. The login is needed in Adobe Creative Suite components or in Acrobat, if a project requires it, to log in to the Version Cue Workspace Administration utility.

6 Type a password for the user in the Password box, and type it again in the Verify Password box.

7 (Optional) Type a phone number, an email address, and comments in the remaining text boxes. Make sure to enter an email address if the user will participate in Version Cue PDF reviews and will receive email invitations.

8 To define the user's project access, choose the user's project privileges next to each project name in the Privileges column. To give the user the same privileges for every project, choose an option from the Set All To menu.

9 To let a user publish a project to a specified FTP or WebDAV server, select the check box in the Publishing Privilege column next to the project name.

10 Click Save.

Edit a Version Cue user name

To edit a user's privileges, you need system administrator privileges.

1 Log in to the Version Cue Workspace Administration page.

2 Do one of the following:

- Click Edit Users in the Home page.
- Click the Users tab.

3 Click the user name you want to edit.

4 Edit the user properties and privileges.

5 Click Save.

Duplicate or delete a Version Cue user name

You can duplicate a Version Cue user to set up a new user with the same project privileges as the original user. Complete this procedure, and then change the duplicate user name and login as required.

1 Log in to the Version Cue Workspace Administration page.

2 Click the Users tab.

3 Select the check box next to each user name you want to duplicate or delete. To select all listed user names, select the check box next to the User Name column label.

4 Do one of the following:

- Click Duplicate. Edit the user's properties in the Duplicate User content frame and click Save.
- Click Delete. To confirm the deletion, click Delete in the Delete User content frame.

Choosing user privileges

Version Cue user logins are associated with one of three levels of privilege: None, User, or System Administrator. Users with privileges set to None can't access the Version Cue Workspace Administration utility but can access Version Cue projects while working in an Adobe Creative Suite component, Acrobat, or an application that supports WebDAV. The following table describes the privileges associated with the User and System Administrator levels.

Administration utility task	User	System Administrator
Create and update Version Cue user login IDs	No	Yes
Read other Version Cue users' login information	Yes	Yes
Update own user login information excluding login ID privilege level	Yes	Yes
Duplicate and delete user IDs	No	Yes
Import and export user lists	No	Yes
Create new projects (users must have Project Creation Allowed selected in their privileges)	Yes	Yes
Delete or restore project backups	No	Yes
Perform all tasks listed in the Advanced content frame	No	Yes

Administration utility task	User	System Administrator
Change the Version Cue Administration utility color scheme in the Advanced preferences	Yes	Yes
Reset locks and remove file versions from projects to which the user is assigned and also granted administrator privileges	Yes	Yes
Back up, delete, and restore all Version Cue Workspace data	No	Yes
View Version Cue Workspace information, logs, and reports; and save reports	Yes	Yes
Delete reports for projects to which the user is assigned and also granted administrator privileges	Yes	Yes

Import and export users

If you want to add a set of users to another computer with a Version Cue Workspace, you can export the list and then copy it to the UsersExport folder in the Version Cue application folder of another computer with a Version Cue Workspace.

Export a list of users

1 Log in to the Version Cue Administration utility.

2 Click the Users tab.

3 Select the check box next to each user name you want to export. To select all listed user names, select the check box next to the User Name column label.

4 Click Export List. The Export Users content frame displays the list of users to be exported.

5 Click Next, and type a name for the list in the Name box. If you like, type remarks in the Comments box.

6 Click Save. The Export Users content frame displays the list of exported users.

7 The location of the user list appears under the Export Users heading. To import this list into another Version Cue Workspace, copy this file into the destined workspace's Data/UsersExport folder in the Version Cue application folder. Note that this folder can be moved and may be in a different location on the workspace.

Import users from a list

1 Log in to the Version Cue Administration utility.

2 Click the Users tab, and then click Import Users.

3 Click the name of the user list you want to import.

4 Select the check box next to each user name you want to import, or select the check box next to the User Name column label to select all listed user names.

5 Click Next.

Viewing logs, reports, and workspace information

Viewing Version Cue Workspace information and reports

You can display the Version Cue Workspace version, name, licensee, serial number, Java version, database version, Version Cue client URL (IP or DNS address), WebDAV client URL, copyright, and patent information with the Version Cue Workspace Administration utility.



Users who are working in Adobe Creative Suite or Acrobat can use the Version Cue Client URL to connect to Version Cue projects when they're not on the workspace's subnetwork. Users who are working in applications that support WebDAV can use the WebDAV Client URL to connect to Version Cue projects.

You can also display and manage three kinds of reports (import, export, and publish) and the Version Cue Workspace log file, which tracks all server operations according to the level of detail you specify.

Display time varies according to the size of the log file. The default log file size is 1024 KB. If the log file exceeds a specified size limit, the system creates a new log file and saves the old one. Log files are saved in the Logs folder, located in the Version Cue application folder.

View Version Cue Workspace information

1 Log in to the Version Cue Administration utility.

2 Do any of the following:

- Click the Home tab. Workspace information is listed under About This Workspace.
- Click the Advanced tab, and then select Workspace Info.
- Click About at the top of the page to display copyright and patent information. A window opens, listing information about the Version Cue Workspace.

View the Version Cue Workspace log file

1 Log in to the Version Cue Administration utility.

2 Click the Advanced tab, and then select Workspace Log. The Workspace Log content frame displays information about the Version Cue Workspace history.

3 Do any of the following:

- To change the number of rows displayed, choose an option from the Rows To Display menu.
- To navigate to a different page of the log, click Next, End, Beginning, or Previous, if available.

View a Version Cue report

1 Log in to the Version Cue Administration utility.

2 Click the Advanced tab, and then select Reports.

3 Choose the type of report you want to view from the Reports menu.

4 To view available reports from a single project, choose the project name from the Filter By menu. To view available reports from all projects on the Version Cue Workspace, choose All.

5 Click the project's name in the Project Name column. The content frame displays the report. Choose options from the available menus to change how the report appears.

6 To save an HTML copy of the report to your computer, click Save, and specify a location.

7 To return to the report list, click Report List.

Delete Version Cue reports

1 Log in to the Version Cue Administration utility.

2 Click the Advanced tab, and then select Reports.

3 Choose the type of report you want to delete from the Reports menu:

- To delete all reports from a single project, choose the project name from the Filter By menu.
- To delete all reports from two or more projects on the Version Cue Workspace, choose All.

4 Select the check box next to each project whose reports you want to delete. To select all project reports, select the check box next to the Project Name column label.

5 Click Delete.

Version Cue PDF reviews

About Version Cue PDF reviews

Using Version Cue you can set up and conduct web-based reviews of PDF documents that are in a Version Cue Workspace. You can invite selected reviewers by email, create the email message in your email program, and include a direct link to the review document in the message. Invited reviewers only need Adobe Acrobat software and a Version Cue login to access the PDF document using their web browser. As the review progresses, reviewers upload their comments to the Version Cue Workspace. In an open review, all reviewers can see each other's comments in the PDF document as the review progresses.

You can specify when the review ends or stop a review at any time. When a review is complete, you can view all comments either in the context of the original document or as a list in the Version Cue Administration utility. When you view the comments in the context of the PDF document, all of the Acrobat commenting tools are available, including printing.

Version Cue PDF reviews are especially useful in the late stages of a project when there isn't time to arrange a traditional paper-based review. They are also useful when reviewers are dispersed over a wide geographical area. Aggregated comments make it easy to summarize comments and track the progress of the review.

Start a new Version Cue PDF review

You use the Version Cue Administration utility to initiate and manage a Version Cue PDF review. From the Version Cue PDF review area in the utility, you can start reviews and invite reviewers, find reviews in which you're participating, search for review documents, view review comments (as well as filter the comments by reviewer), stop reviews, and delete finished reviews. You can also reopen completed reviews.

Keep in mind the following requirements for using Version Cue PDF review:

- To use Version Cue PDF review, reviewers need a Version Cue login name and privileges that allow them to log in to the Version Cue Workspace hosting the review.
- To view the PDF and add comments, users need Acrobat 7.0 Professional or later. For more information about commenting in Acrobat, see Acrobat Help.

- To access a review, users need an Internet connection.

You can start a Version Cue PDF review for any version of any PDF document that is in a Version Cue Workspace, provided that you have appropriate privileges to access the Version Cue Administration utility. Only one version of a PDF document may be in active review at any point in time.

At any time, to return to the main Version Cue CS2 Review page, click the Home button . To return to Version Cue Administration, click Version Cue CS2 Administration.

1 Log in to the Version Cue Administration utility. (For instructions, see "Log in to and out of the Version Cue Administration utility" on page 535.)

2 Click the Version Cue CS2 Review link at the top of the page.

3 Do one of the following:

- On the main Version Cue CS2 Review page, click Start A Review.
- Click the Documents tab, and choose Not Started from the Review Status menu.

4 In the Document List, click the name of the PDF document you want to review.

5 Choose the version you want to review, and then click Start Review.

6 On the Start Review page, enter review information:

- To set an end date for the review, select Deadline, and then choose the end date from the Year, Month, and Day menus.
- To let reviewers see each other's comments, select Open under Review Mode. Select Private if you want reviewers to see only their own comments.
- If you want to add a description of the review, type the information in the Description box.
- To add reviewers, select the reviewers' names in the Reviewers section (click the check box next to the Reviewers column label to select or deselect all reviewers).

Note: *If a reviewer is outside your everyday workgroup and doesn't have a Version Cue login, you'll need to set one up in advance. You must also provide network access—typically through a firewall—for outside reviewers.*

7 Click Next.

8 To send an email invitation to reviewers, select Send E-Mail Invitation, and then modify the Mail Subject and Mail Message as desired. In the E-Mail Recipients section, choose reviewers you wish to invite by email.

9 Click Start Review to activate the review.

10 If you chose to invite reviewers by email, Version Cue starts your email program and displays an email message addressed to the reviewers. The message includes a direct link to the document being reviewed. Confirm the contents of the message, and send it.

Manage PDF reviews

After you locate a PDF review, you can open it, view or delete review comments, stop or restart a review, or delete the review from the Version Cue Workspace.

When you delete a review, Version Cue permanently removes the review comments. However, review comments for a PDF file are also deleted if you permanently delete the file itself from the Version Cue Workspace. Note that if you delete only a version of a PDF file from the workspace, the review comments for that version are deleted.

See also

"Start a new Version Cue PDF review" on page 549

"Delete files and folders" on page 527

Locate PDF reviews

1 Log in to the Version Cue Administration utility.

2 Click the Version Cue CS2 Review link at the top of the page.

3 Do one of the following:

- If you don't know the name of the PDF document under review, or want to view all active reviews, click Active Reviews on the Home tab. Alternatively, click the Documents tab and choose Active from the Review Status menu.
- If you don't know the name of the PDF document for which a review has been completed, or want to view all completed reviews, click Finished Reviews on the Home tab. Alternatively, click the Documents tab and choose Finished from the Review Status menu.
- If you want to search for a PDF document that is under review or for which a review has been completed, click Search Documents on the Home tab, and choose search criteria from the Project Name, Review Status, and List Entries menus. To find a PDF document by its name, enter the name or part of it in the Document Name field. Click Search.

Open an active or completed PDF review

1 Locate the active or completed review.

2 Click the PDF document name in the Document List, and then select any of the versions in the Document History list.

Stop a PDF review

1 Locate the active review.

2 Click the PDF document name in the Document List.

3 In the Document History list, select the active review and click Stop Review.

Restart a completed PDF review

1 Locate the completed review.

2 Click the PDF document name in the Document List.

3 In the Document History list, select the completed review and click Start Review. Adjust review settings as desired.

Note: *After you click Start Review, you see a series of screens that refer to starting, rather than restarting, a review. However, this procedure does restart the review of the existing document.*

Delete a PDF review

1 Locate the active or completed review.

2 Click the PDF document name in the Document List.

3 In the Document History list, select a version and click Delete Review.

4 When Version Cue prompts you to delete the review, click Delete.

Edit review settings

1 Locate the active or completed review.

2 Click the PDF document name in the Document List.

3 Select one of the versions in the Document History list, and click Edit Review Settings.

4 Do any of the following:

- To set or change an end date for the review, select Deadline, and then choose the end date from the Year, Month, and Day menus.
- To let reviewers see each other's comments, select Open under Review Mode. Select Private if you want reviewers to see only their own comments.
- If you want to add or edit a description of the review, type the information in the Description box.
- To add or remove reviewers, select or deselect the reviewers' names in the Reviewers section (click the check box next to the Reviewers column heading to select or deselect all reviewers).

5 Click Next.

6 To send an email invitation to reviewers, select Send E-Mail Invitation, and then modify Mail Subject and Mail Message as desired. In the E-Mail Recipients section, choose reviewers you wish to invite by email.

7 Click Save Review. If you chose to invite reviewers by email, Version Cue starts your email program and displays an email message addressed to the reviewers. This message includes a direct link to the document being reviewed. Confirm the contents of the message, and send it.

Set viewing options in the Document List

You can filter the Document List on the Documents tab by doing one or more of the following:

- To display only PDF documents in a specific project, choose that project from the Project menu.
- To limit the number of documents displayed, choose an option from the List Entries menu (use the arrows to the right of the List Entries menu to view additional files).
- To limit the list according to document name, enter part of a document name in the Document Name field and press Enter (Windows) or Return (Mac OS). (To view all files again, delete the text in the Document Name field and press Enter or Return.)
- To sort the list by the entries in a column, click the column heading. (Click the heading again to reverse the sort order.)

View or delete PDF review comments

Review comments include, in addition to the text of the comment itself, information about who created the comment and when, what type of comment was created, and what page of the document the comment appears on. Different comment types are distinguished by their icons. You can use any of the Acrobat commenting tools in a Version Cue PDF review.

Version Cue stores review comments in the Version Cue Workspace. You can view comments in the Version Cue Administration utility or directly in the PDF document. To view all review comments directly in the document, you must access the document either by using the link from the review invitation or by opening the review document from the Version Cue Administration utility. (If you open the review document from the Open dialog box in Acrobat, the review comments aren't visible.)

For more information about Acrobat commenting tools, search for "commenting" in Acrobat Help.

1 Locate the review (see "Manage PDF reviews" on page 550).

2 Click the PDF document in the Document List.

3 Do one of the following:

- To view all review comments directly in the PDF document, click the version name.
- To view review comments in the Version Cue Administration utility, select the version in the Document History list and click View Comments.



To view any of the comments in the context of the PDF document, select a comment and then click Open In Acrobat.

- To delete review comments in the Version Cue Administration utility, select the comment and click Delete Comments. (To select all comments, click the check box next to the Page column heading.)

Chapter 20: Keyboard shortcuts

This section lists common shortcuts for moving around a document.

Keyboard shortcuts

Keys for selecting tools

To enable single-key shortcuts, choose Edit > Preferences > General, and then select the Use Single-Key Accelerators To Access Tools option.

Tool	Windows action	Mac OS action
Hand tool	H	H
Temporarily select Hand tool	Spacebar	Spacebar
Select tool	V	V
Snapshot tool	G	G
Current zoom tool	Z	Z
Temporarily select Dynamic Zoom tool (when Marquee Zoom tool is selected)	Shift	Shift
Temporarily zoom out (when Marquee Zoom tool is selected)	Ctrl	Option
Select Object tool	R	R
Object Data tool	O	O
Article tool	A	A
Crop tool	C	C
Link tool	L	L
Button tool	F	F
Cycle through forms tools: Button, Check Box, Combo Box, List Box, Radio Button, Text Field, Digital Signature	Shift+F	Shift+F
Movie tool	M	M
Sound tool	Shift+M	Shift+M

Tool	Windows action	Mac OS action
TouchUp Text tool	T	T
TouchUp Object tool	Shift+T	Shift+T
Distance tool	B	B
Cycle through measuring tools: Distance, Perimeter, Area	Shift+B	Shift+B

Keys for editing

Result	Windows Action	Mac OS Action
Select all content	Ctrl+A	Command+A
Deselect all content	Ctrl+Shift+A	Command+Shift+A
Fit page	Ctrl+0	Command+0

Keys for working with comments

To enable single-key shortcuts, select the Use Single-Key Accelerators To Access Tools option in General preferences.

Result	Windows Action	Mac OS Action
Sticky Note tool	S	S
Text Edits tool	E	E
Stamp tool	K	K
Current highlighting tool	U	U
Cycle through highlighting tools: Highlighter, Cross-Out Text, Underline Text	Shift+U	Shift+U
Arrow tool	D	D
Cycle through drawing markup tools: Rectangle, Oval, Arrow, Line, Polygon, Polygon Line	Shift+D	Shift+D
Cloud tool	Q	Q
Text Box tool	X	X
Attach file as comment	J	J
Cycle through attach tools: Attach File, Attach Sound, Paste Clipboard Image	Shift+J	Shift+J

Result	Windows Action	Mac OS Action
Move focus to comment	Tab	Tab
Move focus to next comment	Shift+Tab	Shift+Tab
Open pop-up window for comment that has focus	Enter	Return
Send and receive comments in browser-based review	O	O
Go back online	I	I

Keys for navigating a PDF

Result	Windows Action	Mac OS Action
Previous screen	Page Up	Page Up
Next screen	Page Down	Page Down
First page	Home or Shift+Ctrl+Page Up or Shift+Ctrl+Up Arrow	Home or Shift+Command+Up Arrow
Last page	End or Shift+Ctrl+Page Down or Shift+Ctrl+Down Arrow	End or Shift+Command+Down Arrow
Previous page	Left Arrow or Ctrl+Page Up	Left Arrow or Command+Page Up
Next page	Right Arrow or Ctrl+Page Down	Right Arrow or Command+Page Down
Previous view	Alt+Left Arrow	Command+Left Arrow
Next view	Alt+Right Arrow	Command+Right Arrow
Previous document (with multiple PDFs open in a single document window)	Alt+Shift+Left Arrow	Not available
Next document (with multiple PDFs open in a single document window)	Alt+Shift+Right Arrow	Not available
Scroll up	Up Arrow	Up Arrow

Result	Windows Action	Mac OS Action
Scroll down	Down Arrow	Down Arrow
Scroll (when Hand tool is selected)	Spacebar	Spacebar
Zoom in	Ctrl+equal sign	Command+equal sign
Zoom out	Ctrl+hyphen	Command+hyphen

Keys for general navigating

Result	Windows Action	Mac OS Action
Show/hide menu bar	F9	Shift+Command+M
Move focus to menus	F10	Control+F2
Move focus to toolbar in browser	Shift+F8	Shift+F8
Move to next open document (when focus is on document pane)	Ctrl+F6	Command+F6
Move to previous open document (when focus is on document pane)	Ctrl+Shift+F6	Command+Shift+F6
Close current document	Ctrl+F4	Command+F4
Close all open windows	Ctrl+Shift+W	Command+Shift+W
Move focus to next tabbed page or palette	F6	F6
Move focus to previous pane or panel	Shift+F6	Shift+F6
Move focus to next comment, link, or form field in the document pane	Tab	Tab
Move focus to document pane	F5	F5
Move focus to previous comment, link, or form field in the document pane	Shift+Tab	Shift+Tab
Activate selected tool, item (such as a movie or bookmark), or command	Spacebar or Enter	Spacebar or Enter

Result	Windows Action	Mac OS Action
Open context menu	Shift+F10	Control+click
Close context menu	F10	Esc
Return to Hand tool or Select tool	Esc	Esc
Move focus to next tab in a tabbed dialog box	Ctrl+Tab	Not available
Move to next search result and highlight it in the document	F3	F3 or Command+G
Select text (with Select tool selected)	Shift+Arrow keys	Shift+Arrow keys
Select next word or deselect previous word (with Select tool selected)	Ctrl+Right Arrow or Left Arrow	Command+Right Arrow or Left Arrow

Keys for working with navigation panels

Result	Windows Action	Mac OS Action
Show/hide navigation pane	F4	F4
Open and move focus to navigation pane	Ctrl+Shift+F5	Command+Shift+F5
Move focus among the document, message bar, and navigation panels	F6	F6
Move focus to next element of the active navigation panel: Trash Can, Options menu, Close box, panel contents, or panel button	Tab	Tab
Move to previous or next navigation panel and make it active (when focus is on the panel button)	Up Arrow or Down Arrow	Up Arrow or Down Arrow
Move to next navigation panel and make it active (when focus is anywhere in the navigation pane)	Ctrl+Tab	Not available
Expand the current bookmark (focus on Bookmarks panel)	Right Arrow or Shift+plus sign	Right Arrow or Shift+plus sign

Result	Windows Action	Mac OS Action
Collapse the current bookmark (focus on Bookmarks panel)	Left Arrow or minus sign	Left Arrow or minus sign
Expand all bookmarks	Shift+*	Shift+*
Collapse selected bookmark	Forward Slash (/)	Forward Slash (/)
Move focus to next item in a navigation panel	Down Arrow	Down Arrow
Move focus to previous item in a navigation panel	Up Arrow	Up Arrow

Keys for navigating the Help window

Result	Windows Action	Mac OS Action
Open Help window	F1	F1 or Command+?
Close Help window	Ctrl+W or Alt+F4	Command+Q
Move focus between navigation pane and topic pane	Ctrl+Tab	Not available
Move focus to the next link within a pane	Tab	Not available
Move focus to the previous link within a pane	Shift+Tab	Not available

Keys for navigating the How To panel

Result	Windows Action	Mac OS Action
Open or close How To panel	Shift+F4	Shift+F4
Open and move focus to How To panel	Shift+F1	Shift+F1
Go to How To home page from a How To topic	Home	Not available
Move focus between the elements of the How To panel and the header of the How To panel	Ctrl+Tab or Ctrl+Shift+Tab	Not available

Result	Windows Action	Mac OS Action
Move focus down through the elements of the How To panel	Tab	Tab
Move focus up through the elements of the How To panel	Shift+Tab	Shift+Tab
Go forward to next page in How To panel viewing history	Right Arrow	Right Arrow
Go back to previous page in How To panel viewing history	Left Arrow	Left Arrow

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