



Providing Reliable Technology Solutions for Business

Adobe Acrobat DC Guide



A Complete Overview for Connect Users



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Chapter 1: Interface Fundamentals

Adobe Acrobat DC user interface has three views - Home, Tools, and Document.



- **Home:** This is the gateway or the landing page when you don't have a PDF opened in Acrobat DC.
- **Tools:** This is the go to place to discover the tools that's available in Acrobat DC. All Acrobat DC tools are shown in this view.
- **Document:** This is the default view whenever a document is opened in Acrobat DC.

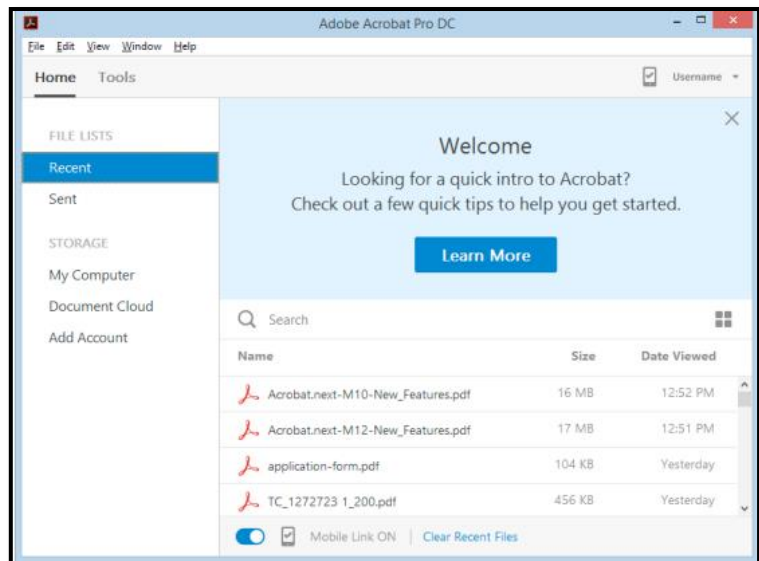
Chapter 2: Home View

This is the gateway or the landing page when you don't have a PDF opened in Acrobat. When you launch Acrobat, you see a welcome message with the Learn More button pointing to a quick introduction document.

The Home view displays two file lists - Recent and Sent. All your recently accessed files are displayed in the Recent file list, and all the files that you sent using Adobe Send & Track and Send for Signature are displayed in the Sent file list.

The Storage option lists various places from which you can open and work on files from within Acrobat - My Computer, Document Cloud, and Add Account (a SharePoint account).

- **Recent:** Recent files that have been opened.
- **Sent:** Files that have been used in Send and Track.
- **My Computer:** Files saved on your computer or network.
- **Document Cloud:** Files saved here can be accessed through any mobile device to view or edit. *Files uploaded to the document cloud are virus scanned as they upload.*
- **Add Account:** From here you can add an account such as Dropbox or SharePoint to access files saved there.



Chapter 3: Tools

Tools are the options to create, edit, manage, print or comment in documents. Tools are now located under a tab. There is a pane on the right hand side of your document with some editing and other tools listed. The Tools listed in this pane can be modified to fit what you use most often.



Accessibility

Create and verify PDF files to meet accessibility standards for people with disabilities



Certificates

Digitally sign or certify documents and validate authenticity



Combine Files

Combine and arrange files into a single PDF



Comment

Add comments with highlights, sticky notes, and mark-up tools



Create Custom Tool

Create a customized collection of Acrobat features and share with others



Create PDF

Create a PDF from any format



Edit PDF

Edit text and images in PDF files



Export PDF

Convert PDFs to Word, Excel, PowerPoint and more



Fill & Sign

Fill and sign documents and forms electronically



Prepare Form

Quickly convert Word, Excel or scanned forms into PDF forms



Measure

Measure distance, area, and perimeter of objects



Optimize PDF

Reduce PDF file size, enable fast web view, control image and font options



Organize Pages

Delete, insert, extract, or rotate pages



Enhance Scans

Turn scans or photos of paper documents into searchable PDFs with selectable text



Protect

Prevent others from copying, printing & editing the information in PDFs



Send for Comments

Automatically collect comments from reviewers in a single PDF

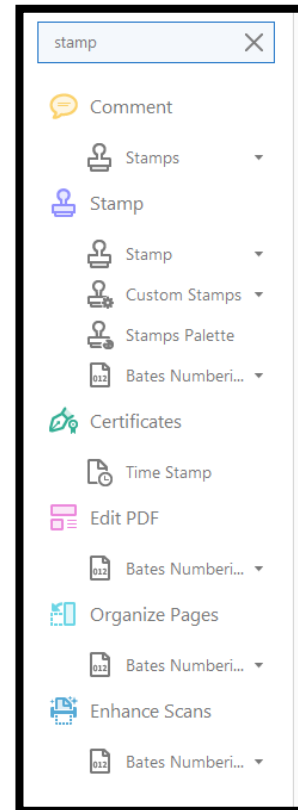
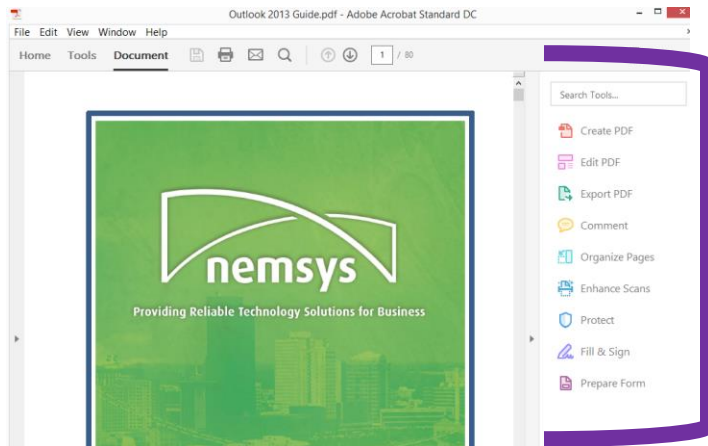


Stamp

Add stamps such as 'approved' or 'draft'

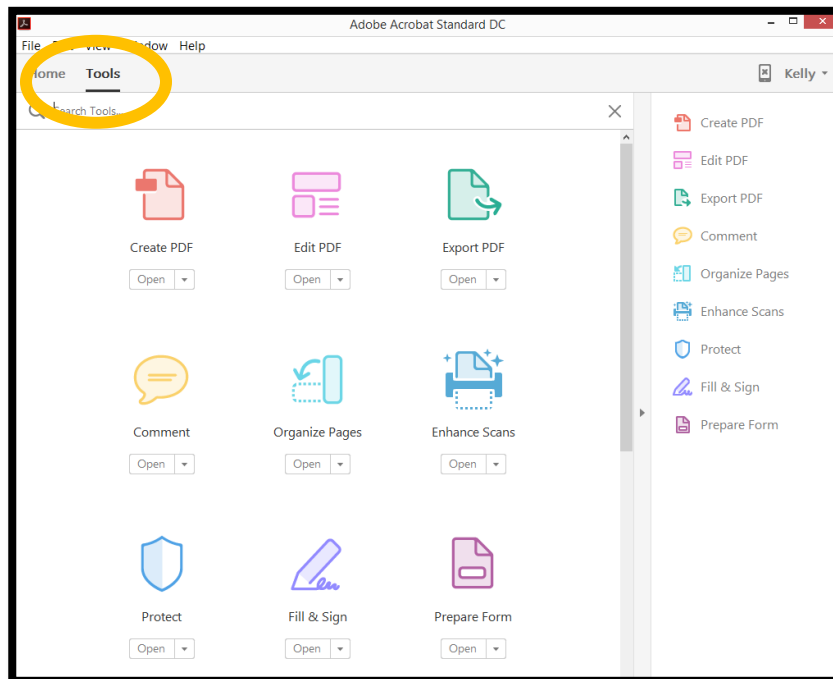
Find Tools

From the pane on the right hand side of your document, you can easily search all Tools by using the search function. This will bring back any tools that may fit your search description.



Accessing All Tools

To view all Tools available, you can select TOOLS from the top of your screen. To move back to your document from the Tools screen, just select Document at the top of your screen.

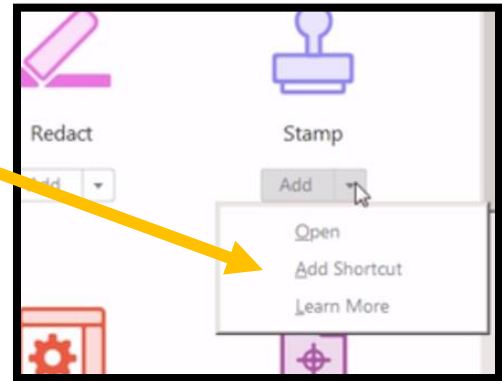
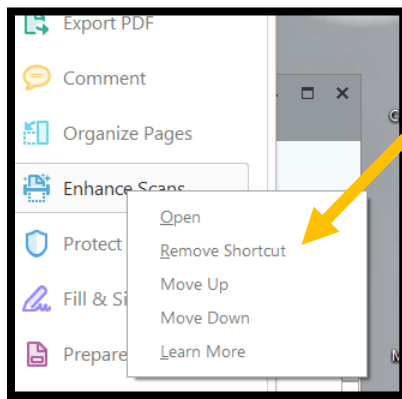


Modify Favorite Tools

This section explains how to modify the Tools pane on the right side of your document, to see what you use most often.

Adding: Access the full Tools options from the top tab. Once in there, the Tools have drop down menus with different options. There is an option to ADD TO FAVORITES. Clicking this will place that Tool in the favorite's pane.

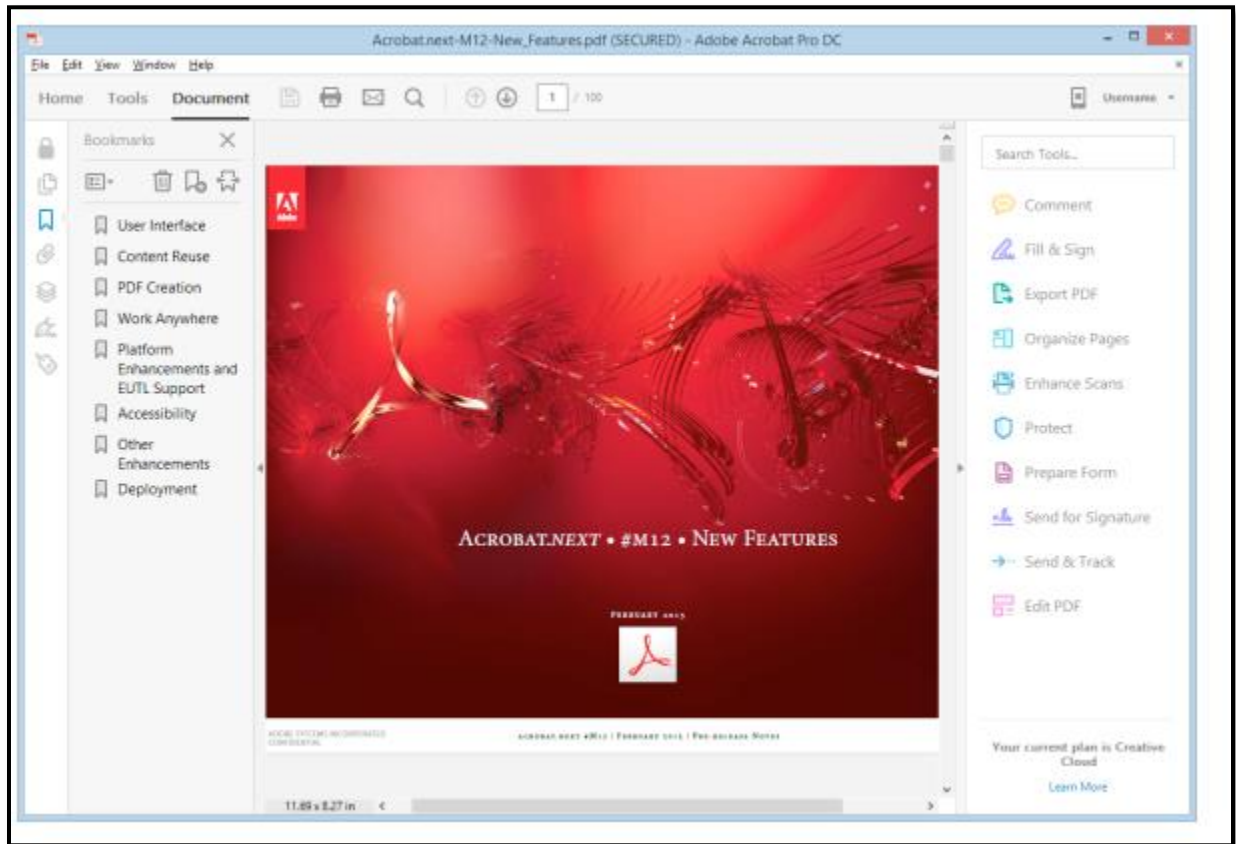
You can also add it to the shortcut pane by clicking and dragging it from the Tools screen over to the Shortcut Pane.



Removing: To remove an item from the Tools pane, right click on that Tool to see the option to remove shortcut. This Tool will still be accessible if needed, under the Tools menu at the top of the window.

Chapter 4: Document View

This is the default view whenever a document is opened in Acrobat. The menu bar and the toolbar are visible at the top of the work area. The work area for the stand-alone application includes a document pane in the middle, a navigation pane on the left, and tools or task pane on the right side. The document pane displays Adobe PDFs. The navigation pane on the left side helps you browse through the PDF and perform other options on PDF files. Toolbars near the top of the window provide other controls that you can use to work with PDFs. Note: When a tool is opened, you see the tool-specific commands in the toolbar and the right pane.



Chapter 5: Accessibility

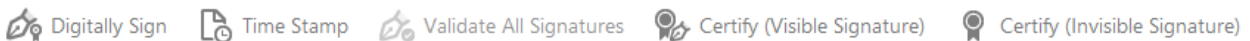
Acrobat DC Accessibility make it easy to create accessible PDFs and check the accessibility of existing PDFs. You can create PDFs to meet common accessibility standards, such as Web Content Accessibility Guidelines (WCAG) 2.0 and PDF/UA (Universal Access, or ISO 14289).

Chapter 6: Certificates



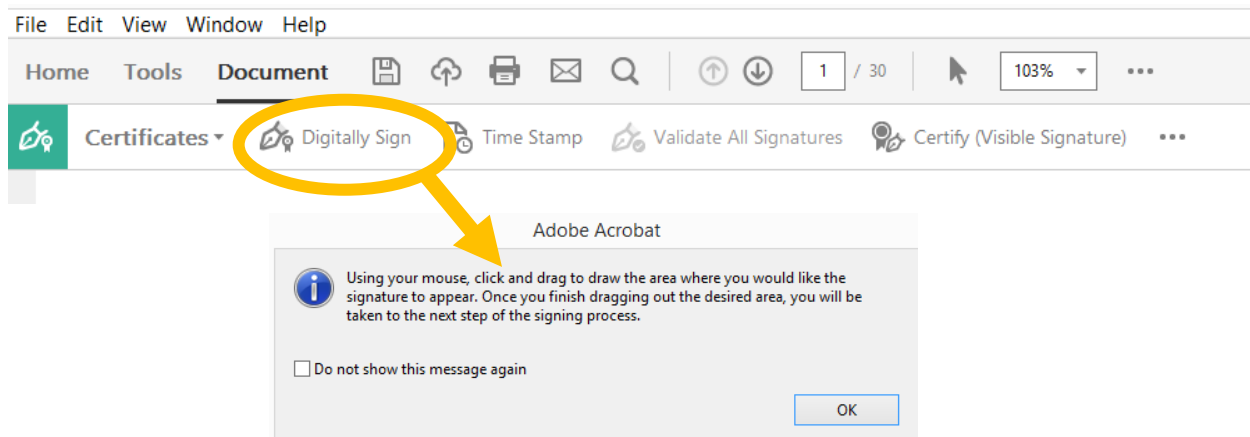
Certificates

Use certificates to encrypt documents and to verify a digital signature. A digital signature assures recipients that the document came from you. Encryption ensures that only the intended recipient can view the contents. A certificate stores the public key component of a *digital ID*.



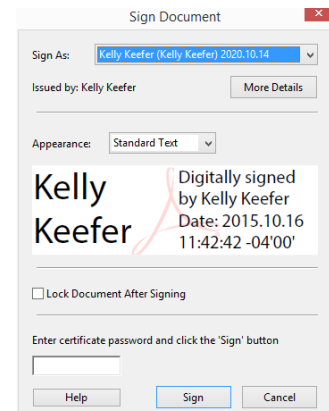
Digitally Sign

To add your certified signature to a document, open the document then select TOOLS and CERTIFICATES. Once the certificates toolbar opens, select DIGITALLY SIGN.



After selecting the area to place your signature, the Sign Document pop up will appear. The appearance section will show your signature (*note, the example is not exactly how your signature will appear*). In the password box at the bottom, enter your signature password. Click SIGN and the Windows Explorer box will appear to save the document with your signature. Once you save the document, your signature will appear on the document.

You now have a certified signature on your document.



Timestamp

You can include the date and time you signed the document as part of your certificate-based signature. Timestamps are easier to verify when they are associated with a trusted timestamp authority certificate. A timestamp helps to establish when you signed the document and reduces the chances of an invalid signature. You can obtain a timestamp from a third-party timestamp authority or 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, the 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

Validate All Signatures

Set your verification preferences in advance. This helps ensure that Digital Signatures are valid when you open a PDF and verification details appear with the signature. When Digital Signatures are validated, an icon appears in the document message bar to indicate the signature status. Additional status details appear in the Signatures panel and in the Signature Properties dialog box.

Setting up digital signature validation

When you receive a signed document, you may want to validate its signature(s) to verify the signer and the signed content. Depending on how you have configured your application, validation may occur automatically. Signature validity is determined by checking the authenticity of the signature's digital ID certificate status and document integrity:

- Authenticity verification confirms that the signer's certificate or its parent certificates exist in the validator's list of trusted identities. It also confirms whether the signing certificate is valid based on the user's Acrobat or Reader configuration.
- Document integrity verification confirms whether the signed content changed after it was signed. If content changes, document integrity verification confirms whether the content changed in a manner permitted by the signer.

Set signature verification preferences

- **Step 1:** Open the Preferences dialog box.
- **Step 2:** Under Categories, select Signatures.
- **Step 3:** For Verification, click More.
- **Step 4:** To automatically validate all signatures in a PDF when you open the document, select Verify Signatures When The Document Is Opened. This option is selected by default.
- **Step 5:** Select verification options as needed and click OK.

Verification Behavior

- **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 Certificate Revocation Checking To Succeed Whenever Possible:** Checks certificates against a list of excluded certificates during validation. This option is selected by default. If you deselect this option, the revocation status for approval signatures is ignored. The revocation status is always checked for certifying signatures.

Verification Time

- **Verify Signatures Using:** Select an option to specify how to check the digital signature for validity. By default, you can check the time based on when the signature was created. Alternatively, check based on the current time or the time set by a timestamp server when the document was signed.
- **Use Expired Timestamps:** Uses the secure time provided by the timestamp or embedded in the signature, even if the signature's certificate has expired. This option is selected by default. Deselecting this option allows discarding of expired timestamps.
- **Verification Information:** Specifies whether to add verification information to the signed PDF. Default is to alert user when verification information is too large.
- **Windows Integration:** Specify whether to trust all root certificates in the Windows Certificates feature when validating signatures and certified documents. Selecting these options can compromise security.

Note: It is not recommended to trust all root certificates in the Windows Certificate feature. Many certificates that are distributed with Windows are designed for purposes other than establishing trusted identities. Set the trust level of a certificate In Acrobat or Reader, the signature of a certified or signed document is valid if you and the signer have a trust relationship. The trust level of the certificate indicates the actions for which you trust the signer.

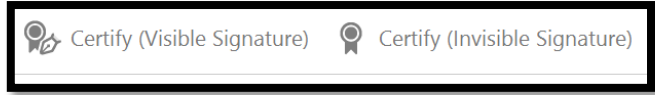
Certify a PDF

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 the form and sign the document. However, 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 already contain any other signatures. Certifying signatures can be visible or invisible. A blue ribbon icon in the Signatures panel indicates a valid certifying signature. A digital ID is required to add the certifying digital signature.

- **Step 1:** Remove content that may compromise document security, such as JavaScripts, actions, or embedded media.

- **Step 2:** Choose Tools > Certificates to open the panel.
- **Step 3:** Click one of the following options:
 - **Certify (Visible):** Places a certified signature in either an existing digital signature field (if available) or in the location you designate.
 - **Certify (Not Visible):** Certifies the document, but your signature appears only in the Signatures panel.
- **Step 4:** Follow the onscreen instructions to place the signature (if applicable), specify a digital ID, and set an option for Permitted Actions After Certifying. *Note: If you enabled the When Signing: View Documents In Preview Mode in the Signature preferences, click Sign Document in the document message bar.*
- **Step 5:** Save the PDF using a different filename than the original file, and then close the document without making additional changes. It is a good idea to save it as a different file so that you can retain the original unsigned document.




Chapter 7: Combine Files

Combine or merge files into single PDF


Create merged PDFs

Combine most file types — even rich media — into a single, organized PDF. You can merge Word, Excel, PowerPoint, audio, video, or web pages, as well as existing PDFs. Acrobat DC lets you preview and arrange the documents and pages before creating the file. You can delete unwanted pages and move individual pages from a document anywhere among the pages being combined. Acrobat DC converts the pages of the various files into sequential pages of a single PDF.

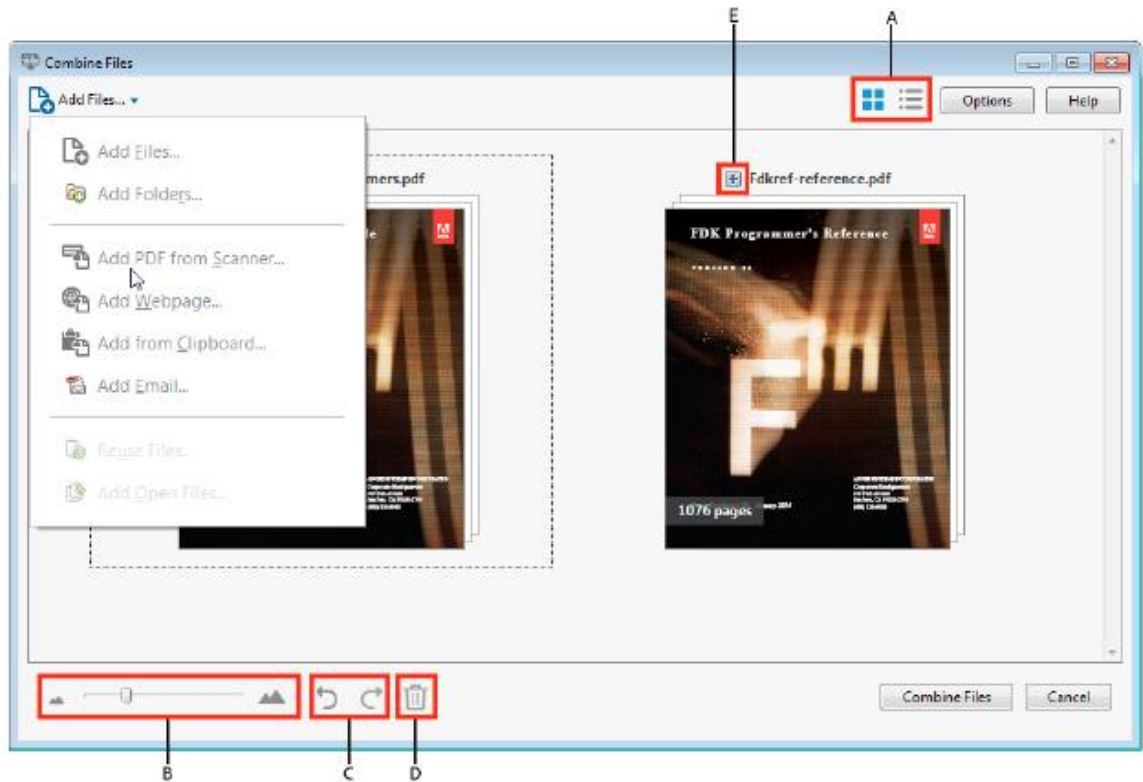
- **Step 1:** Choose **Tools > Combine Files**.
 - The Combine Files dialog box lets you work in two different views:

Thumbnail view 




 - Displays a preview of the pages. It lets you quickly rearrange documents and pages by dragging the thumbnail images.

List view 

 - Lists information about each file. It lets you sort the files by any of the fields, such as name, size, or modification date.
- **Step 2:** Drag files or emails directly into the Combine Files dialog box. Alternatively, choose an option from the Add Files menu. You can add a folder of files, a web page, any currently open files, items in the clipboard, pages from a scanner, or a file you combined previously (Reuse Files).



A Thumbnail and list view buttons B Slider to resize thumbnails C Undo and Redo buttons D Remove Selected Items button E Plus sign displays all pages in a document

- **Step 3:** As needed, do any of the following:
 - **Rearrange pages:** In the Thumbnail view, drag-and-drop the file or page into position. As you drag, a blue bar moves between pages or documents to indicate the current position.
 - **View pages of multipage file:** In the Thumbnail view, click the plus sign next to the filename. Once visible, you can move the individual pages freely among the other pages and documents. Double-click a page to close the multipage file.
 - **Preview pages:** In the Thumbnail view, hover over the page, and then click the Zoom icon.
 - **Delete pages:** In the Thumbnail view, select the page or pages you want to delete, then click the Remove Selected Items  button.
 - **Sort files:** In the List view, click the column name that you want to sort by. Click again to sort in reverse order. The order of files in the list reflects the order of the files in the combined PDF. Sorting rearranges the pages of the combined PDF.
 - **Move files up or down file list:** In the List view, select the file or files you want to move. Then click the Move Up  or Move Down  button.
- **Step 4:** Click Options, and select one of the file size options for the converted file:

- **Smaller File Size:** Reduces large images to screen resolution and compresses the images by using low-quality JPEG. This option is suitable for onscreen 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. The Reduce File Size feature is not applied if either the Default File Size or Larger File Size option is selected.
- **Default File Size:** Create PDFs suitable for reliable viewing and printing of business documents. The PDF files in the list retain their original file size and quality.
- **Larger File Size:** Creates PDFs suitable for printing on desktop printers. Applies the High Quality Print conversion preset and the PDF files in the list retain the original file size and quality.
 - **Note:** *This option may result in a larger file size of the final PDF.*
- **Step 5:** In the Options dialog box, specify the conversion settings as needed, then click **OK**.
- **Step 6:** When you have finished arranging the pages, click **Combine Files**.
 - A status dialog box shows the progress of the file conversions. Some source applications start and close automatically.

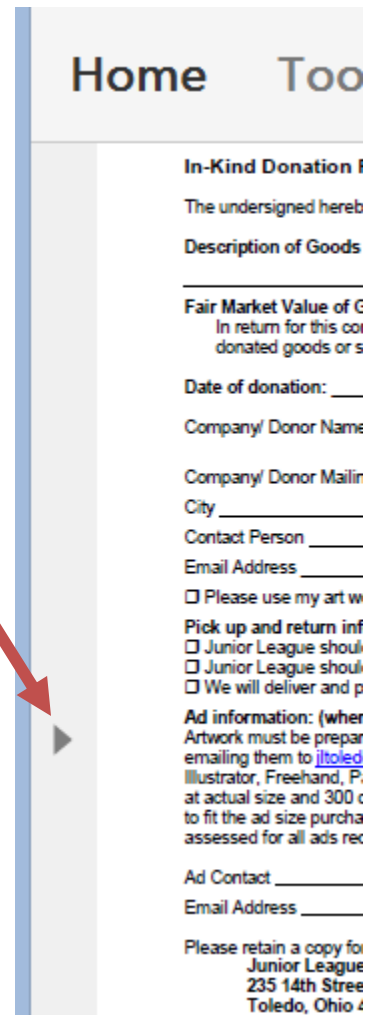
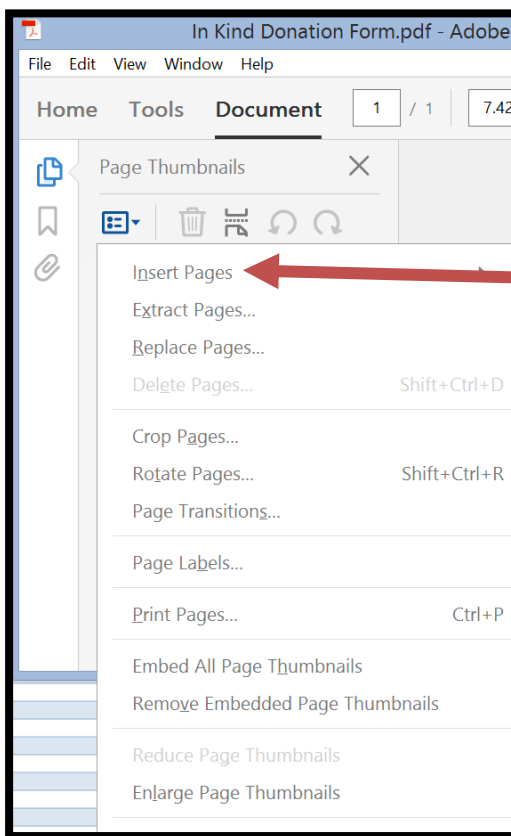
Combine files with opened documents

This section will show you how to add files to a document you are currently working in, in Adobe Acrobat DC.

- **Step 1:** Expand arrow on right side of screen.
- **Step 2:** Select the top icon



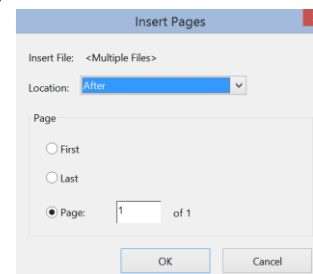
- **Step 3:** Select first icon and select INSERT PAGES.



- **Step 4:** Select file from windows explorer.
NOTE: You can select more than one file at a time, using your CTRL key.

- **Step 5:** Select location to insert new pages.

- **Step 6:** Pages will be inserted.



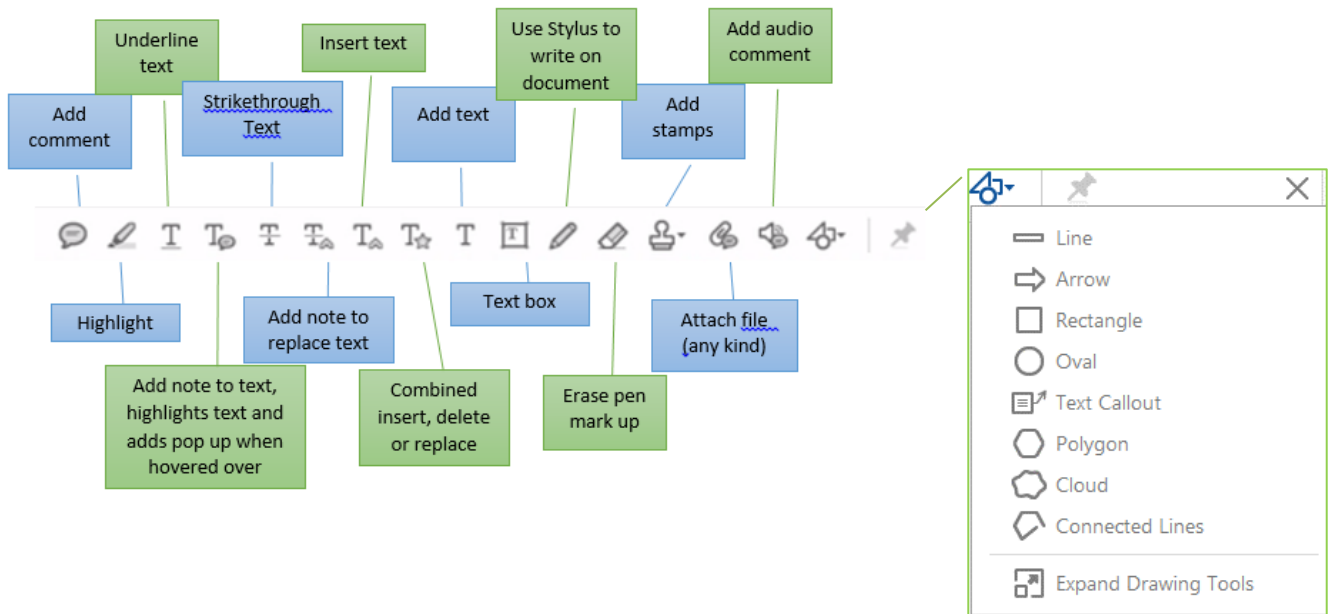
Chapter 8: Comment




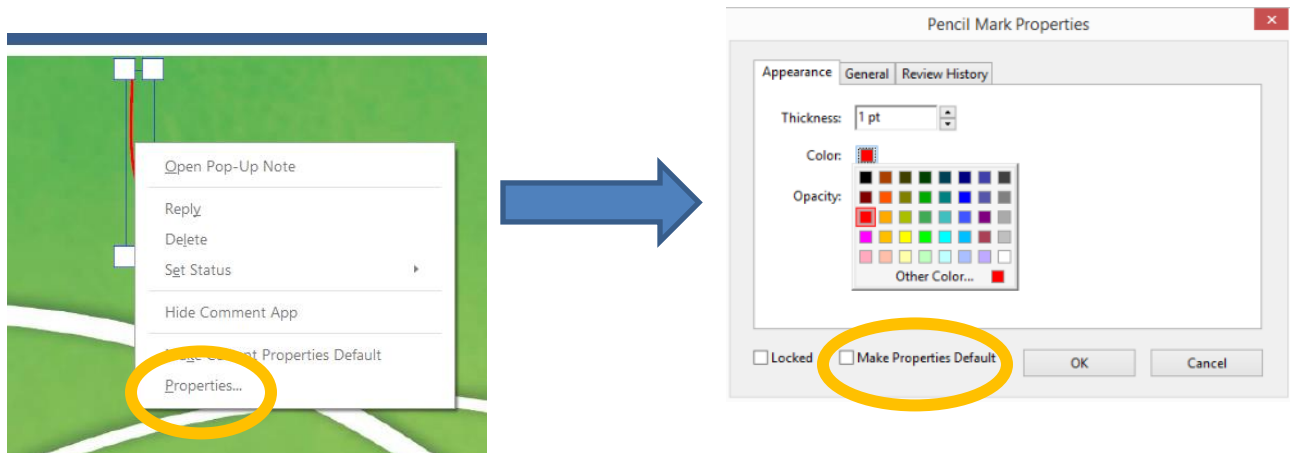
Comment

To edit a document either with the keyboard or a pen. To receive the most options, select **TOOLS → COMMENT**. Once done editing, to save your changes, click **SAVE** in the toolbar.

Comment Toolbar

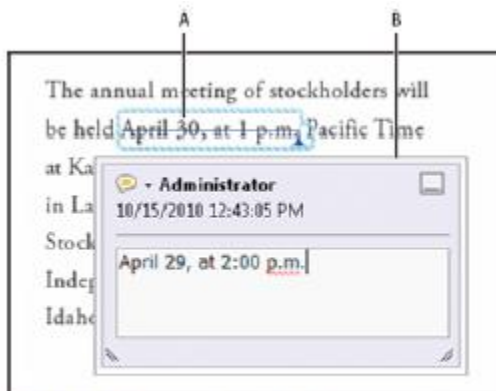


To edit a document using your stylus, select the pen icon  and start writing. *Note:* The initial color always writes in RED. To change this, after your first mark up right click on mark up and select Properties. Under Appearance select COLOR and select the color from the drop down. Make sure to check mark the box Make Properties Default and going forward mark ups will be in the new color.





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.





A Selected text is struck out. B New text is added to a linked pop-up note.

Replace text


- **Step 1:** From the Tools > Comment toolbar, select **Add Note to Replace Text** .
- **Step 2:** Select the text. Any selected text is crossed out and a pop-up note opens.
- **Step 3:** Do one of the following:
 - Type the text to be inserted or added. The insertion caret  appears.

- To indicate that a new paragraph should be added, press Enter, and then close the pop-up note without adding text. The paragraph insertion caret  appears.

Insert text

- **Step 1:** From the Tools > Comment toolbar, select the **Insert Text at Cursor** tool .
- **Step 2:** Click between the words or characters where you want to insert text.
- **Step 3:** Do any of the following:
 - Type the text you want to insert.
 - To indicate that a new paragraph should be added, press Enter, 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 the selected text, and then choose a text edit annotation.*

Delete text

- **Step 1:** From Tools > Comment toolbar, choose the **Strikethrough** tool .
- **Step 2:** Select the text to mark for deletion.

Delete text markups

If markup comments are stacked, delete the comments in the Comments list: Choose Comment > Comments List, select the comment, and press Delete.




- Select the markup and press Delete.

Highlight, strikethrough, or underline text

Note: In Reader, only Sticky Note and Highlight tools are available. Other commenting tools are available only in PDFs that have commenting enabled. PDFs in a review workflow typically include commenting rights.

- You can use the Highlight Text tool, Strikethrough Text tool, and the Underline Text tool to add comments by themselves or in conjunction with notes.

You can add a highlight with a note or you can cross out text or underline text by selecting the text using the Select tool, right-clicking, 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.

- **Step 1:** Choose Tools > Comment, and select the Highlight Text tool , the **Strikethrough Text** tool , or the Underline Text tool .
 - **Note:** If you want to apply more than one comment using the Strikeout Text tool or the Underline Text tool, choose *Keep Tool Selected* from the Options menu after you select the tool. The Highlight Text tool stays selected after you make the first comment.

- **Step 2:** Drag from the beginning of the text you want to mark up. Control-drag to mark up a rectangular area of text. This feature is especially useful when you are marking up text in a column.
- **Step 3:** (Optional) To add a note, double-click the markup and add text in a pop-up note.

Annotations and drawing markup tools overview

You use annotation and drawing markup tools to add comments. The commenting tools are made available in the secondary toolbar of the Comment feature. Comments are notes and drawings that communicate ideas or provide feedback for PDFs. You can type a text message using the Sticky Note tool. Alternatively, 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 that you want in the source document. Most commenting and markup tools don't appear in the toolbar until you enable the Commenting feature.

Note: *If you open a PDF in a browser for a shared review that has ended, the commenting tools are unavailable.*

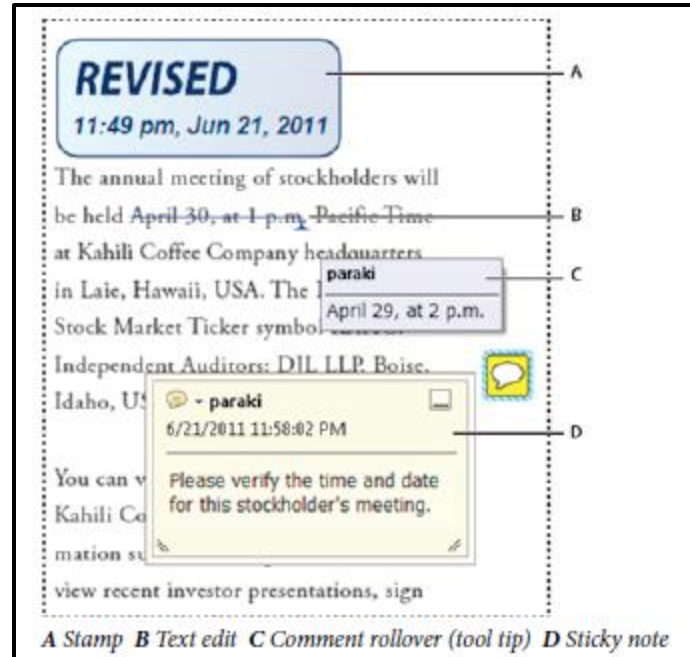
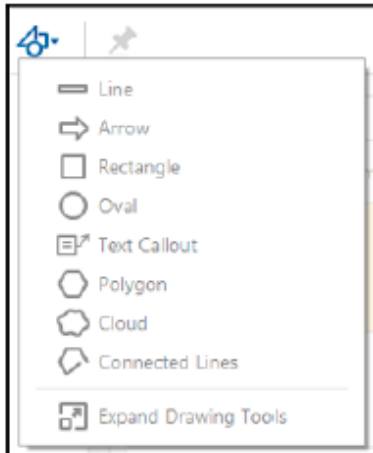
Most comments include two parts: the icon, or markup, that appears on the page, and the text message that appears in a pop-up note when you click or double-click the icon or place the pointer over the icon.

After you add a comment, it stays selected until you click elsewhere on the page. Acrobat DC highlights a selected comment with a blue halo to help you find the markup on the page. A wireframe with selection handles appears on drawing markups and stamps, so that you can adjust the size and shape.

In Acrobat Pro DC, you can add tags to your comments so that readers with motion or vision limitations can read them using assistive technologies.



Note: To see the labels along with the tool icons, right-click on the secondary toolbar and select Show All Labels.




Show annotations and drawing markup tools

Annotations and markup tools don't appear by default, except when you open a PDF in a managed review workflow.

- **Step 1:** Choose **Tools > Comment** to open the Comment tools in the secondary toolbar. The comments that you add to the document are displayed in the right pane.
- **Step 2:** The drawing markup tools are grouped under the **Drawing Tools** menu. Click **Drawing Tools** menu and select **Expand Drawing Tools** to add the drawing tools to the secondary toolbar.


Select an annotation or drawing markup tool

- Open the **Comment** toolbar and select the desired annotation tool.
- To select the drawing markup tool, open the **Comment** toolbar and click the **Drawing Tools icon** . Select the desired tool from the **Drawing Tools** menu.

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 and Highlight Text tools stay selected.)

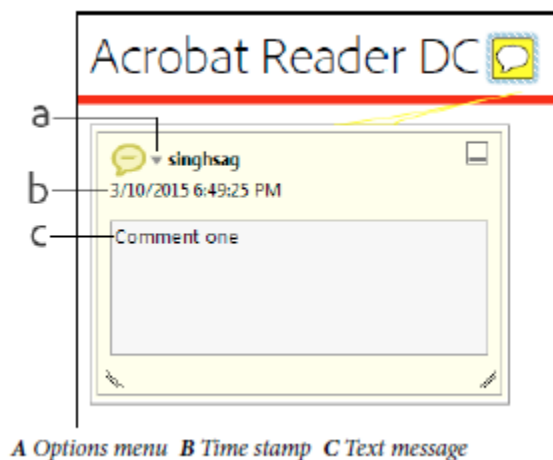
Keep an annotation tool selected



You can add multiple comments without reselecting the tool.

- **Step 1:** In the secondary toolbar, select the tool you want to use (but don't use it yet).
- **Step 2:** Click the **Keep Tool Selected icon** 

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.

Add a sticky note comment

- **Step 1:** Select the Sticky Note tool  in the secondary toolbar, and click where you want to place the note.
- **Step 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

- **Step 1:** Click or double-click the note icon.
- **Step 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 > Show/Hide > Toolbar Items > Show Properties Bar** (or press **Ctrl+E**), select the text, and then select the property you want in the toolbar.


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

After making the desired changes, 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

- **Step 1:** Select the Sticky Note tool , the Hand tool , or the Select tool .
- **Step 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.

Add a text comment











Use the Add Text Comment tool  to type text anywhere on the PDF page. The Add Text Comment tool is similar to the Add Text Box tool.



- **Step 1:** Choose the **Add Text Comment** tool from the secondary toolbar.
- **Step 2:** Click on the page to place the cursor
- **Step 3:** In the **Add Text Comment** tools, specify the font, font size, and other text attributes.

Add a line, arrow, or shape.

Note: In Acrobat Reader DC, drawing tools are available only in PDFs that have commenting enabled. PDFs in a review workflow typically include commenting rights.


When selecting a drawing tool, consider the effect you want.

- **Step 1:** Choose **Tools > Comment**. In the secondary toolbar, click **Drawing Tools**  and select the drawing markup 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.
 - **Note:** To specify the line width, color, and other properties before you draw, select the desired tool, and press **Ctrl+E** to open the properties toolbar. Set the desired options in the Properties toolbar.
- **Step 2:** Draw in the PDF:

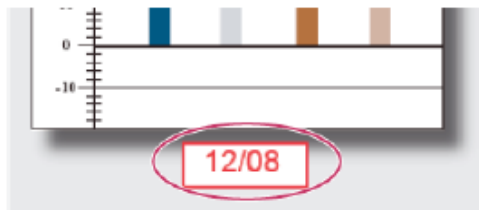
- To create a cloud or polygon shape, click to create the start point, move the pointer, and click to create each segment. To finish drawing the shape, click the start point, or right-click and choose Complete from the menu. Double-click to end a polygon line.
- To draw a line, arrow, or rectangle, either 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.
- **Step 3:** To edit or resize the markup, select it and drag one of the handles to make your adjustments.
- **Step 4:** To add a pop-up note to the markup, select the Hand tool, and double-click the markup.
- **Step 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.


Add comments in a text box or callout

Note: In Acrobat Reader DC, commenting tools are available only in PDFs that have commenting enabled. PDFs in a review workflow typically include commenting rights.

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.

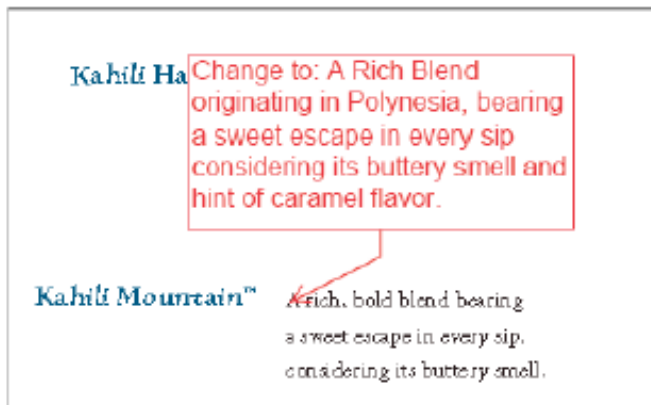
Text font and size are based on the system default settings.




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 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

- **Step 1:** Choose the **Add Text Box**  tool from the secondary toolbar.
- **Step 2:** Click in the PDF.
- **Step 3:** Choose **View > Show/Hide > Toolbar Items > Show Properties Bar** (or press Ctrl+E), and set the color, alignment, and font attributes for the text.
- **Step 4:** Type the text.
 - Text wraps automatically when it reaches the right edge of the box.
- **Step 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.
- **Step 6:** To delete the text box, select it, and then press **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


- **Step 1:** Choose the **Add Text Callout**  tool from the secondary toolbar.
- **Step 2:** Click once to set the location of the end point, and click again to set the location of the text box.

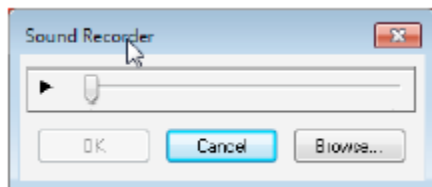
- **Step 3:** Choose **View > Show/Hide > Toolbar Items > Show Properties Bar** (or press Ctrl+E), and select the color, alignment, and font attributes for the text.
- **Step 4:** Type the text.
 - Text wraps automatically when it reaches the right edge of the box.
- **Step 5:** (Optional) To make further 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 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.

Add a prerecorded audio comment


- **Step 1:** Choose the **Record Audio** tool  from the secondary toolbar.
- **Step 2:** Click in the PDF where you want to place the audio comment.
 - The Sound Records dialog box appears.

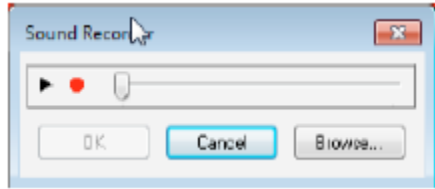




- **Note:** The above dialog box appears when a recording device is not configured on your system.
- **Step 3:** Click **Browse** (Windows) or **Choose** (Mac OS), and select the audio file you want to add.
- **Step 4:** (Optional) To hear the audio comment, click the **Play** button. When you're finished, click the **Stop** button then click **OK**.
- **Step 5:** Specify options in the **Specify Attachment Properties** dialog box, then click **OK**.

Record an audio comment

Note: Before you record an audio comment, ensure that your system has a recording device installed and configured.

- **Step 1:** Choose the **Record Audio**  tool from the secondary toolbar.
- **Step 2:** Click in the PDF where you want to place the audio comment.
 - The Sound Recorder dialog box appears.





- **Note:** The above dialog box appears when a recording device is configured on your system.
- **Step 3:** In the dialog box that appears, click the **Record** button  then speak into the microphone. When you've finished recording, click the **Stop** button , then click **OK**.
- **Step 4:** Specify options in the **Sound Attachment Properties** dialog box, then click **OK**.

Add comments in a file attachment

Note: In Acrobat Reader DC, commenting tools are available only in PDFs that have commenting enabled. PDFs in a review workflow typically include commenting rights.

Use the Attach File 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.

Note: Be sure to use the Attach tool when attaching files for a document review. Document-level file attachments that you attach using the Attach A File tool  from the Tools > Edit PDF > More menu aren't tracked with other comments in a review workflow and may cause your attached comments to be lost.

- **Step 1:** Choose the **Attach File**  tool from the **Comment's** secondary toolbar.
- **Step 2:** Click in the PDF where you want to place the attachment.
- **Step 3:** Select the file that you want to attach, then click **Open**. If you're attaching a PDF, you can highlight areas of interest in the file using comments.
- **Step 4:** In the **File Attachment Properties** dialog box, select the settings for the file icon that appears in the PDF.
 - The comment attachment also appears in the Attachments tab (in the left navigation pane) with a page number indicating its location.
 - **Note:** To delete the attachment, right-click the attached comment icon, and choose **Delete**.

Paste images as comments

Note: In Acrobat Reader DC, commenting tools are available only in PDFs that have commenting enabled. PDFs in a review workflow typically include commenting rights.

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.






- **Step 1:** Copy an image by doing one of the following:
 - In Acrobat DC, choose **Edit > Take A Snapshot**, and select an image from a PDF.
 - In another application, select an image and choose **Edit > Copy**.
- **Step 2:** Open a PDF.
- **Step 3:** Choose **Tools > Comment**. In the secondary toolbar, click the **Add Stamp** tool and select **Paste Clipboard Image As Stamp Tool**.
- **Step 4:** Click in the PDF where you want the image to appear.
- **Step 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 it and choose Properties.
 - To delete the image, right-click it and choose **Delete**.

Chapter 9: Create Custom Tool



Create Custom Tool

You can assemble your own customized collection of Acrobat features, then save it and share with others. It allows you to quickly access the tools and commands you use the most.

- **Step 1:** Choose **Tools > Create Custom Tool**
- **Step 2:** To customize the Toolbar, do any of the following:
 - To add a tool to the toolbar, click the panel on the left, select the tool, and click the Add To Toolbar  icon.
 - To remove a tool from the toolbar set, select its icon, and click the Delete  icon.
 - To change a tool's position in the toolbar, select its icon, and click either the move left  or move right  icon.
 - To add a vertical line to separate groups of tools in the toolbar, click the Add Vertical Line  icon.

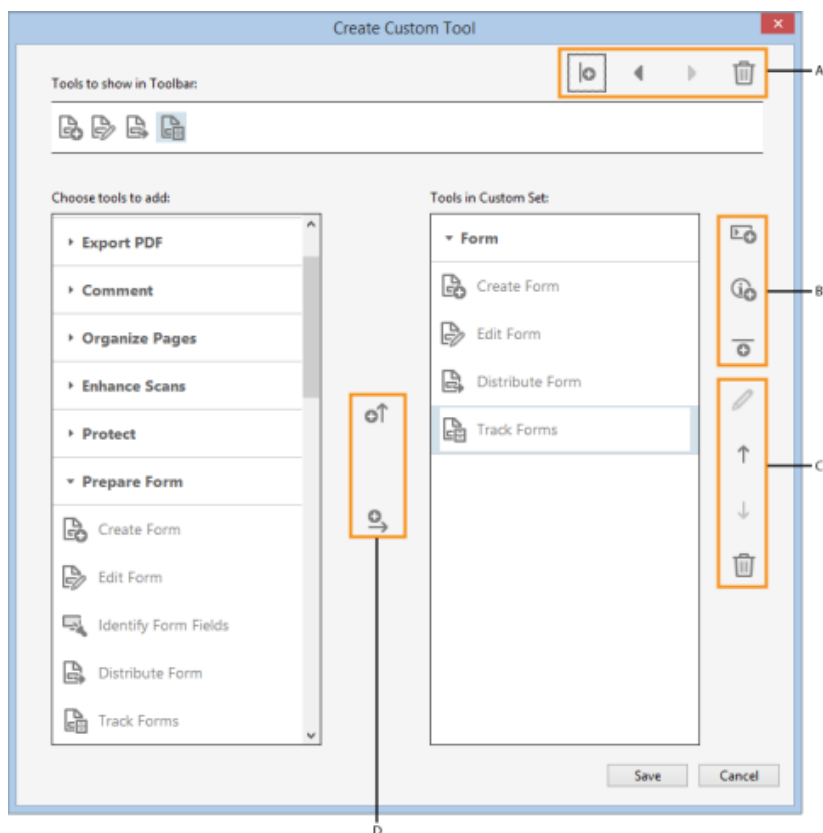
Create Custom Tool dialog box









A. Arrange or delete tools in the Tool's Toolbar

B. Add custom panels, instructions, or divider line between tools

C. Rename, arrange, or delete tools

D. Add to Tool's Toolbar above or Custom Tools set on the right

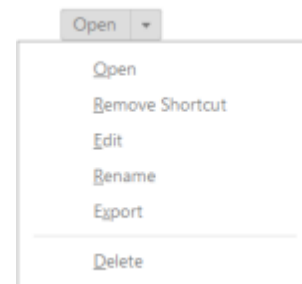


- **Step 3:** To customize tools in the Custom set, do any of the following:
 - To add a tool in the Custom set, click the panel on the left, and then click the Add To Custom set  icon.
 - To create your own panel, click the Add Section  icon on the right. Give the panel a name, and click Save.
 - To add a tool to a panel, select the panel on the right, select the tool on the left, and click the Add To Custom set  icon.
 - To remove a tool from the set, select its icon and click the Delete  icon.
 - To change the position of a tool, select it on the right, and click the Up  or Down  Arrow icons.
 - To add a horizontal line to separate groups of tools, click the Add Divider  icon.
 - To edit instructions or section name, select it, and click the Edit  icon.
- **Step 4:** When your tool set is complete, click **Save**, type its name, and click **Save** again.
- **Step 5:** The created custom tool is added to the Tools center. To open the tool, choose Tools > [custom tool name].

Edit, delete, rename, or share a custom tool

You can edit, rename, copy, delete, rearrange, or share tool sets. You can specify the order the tool sets appear in the Customize menu by moving them up or down in the list. You can share tool sets with your workgroup using the Import and Export options.

Choose **Tools** > [custom tool name] > click the Down Arrow button and then choose an appropriate option.



Chapter 10: Create PDF

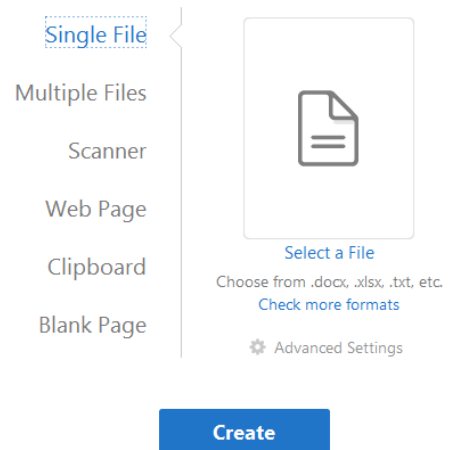


Using the Create PDF tool, you can easily convert almost any file to PDF. *You can also convert office documents without leaving the application using the Acrobat task ribbon in Office for Windows or the Print command in Windows.*

Create PDF

- **Step 1:** Click Tools > Create PDF tool.
- **Step 2:** Select single file or multiple files for office documents. You can also select websites or clipboard contents.
- **Step 3:** Select the file, and click Open. Acrobat displays a preview of your file.
- **Step 4:** Click Create.
- **Step 5:** Acrobat creates the PDF file, saving it in the same location as the original file. It has the same name as the original file, but with a .pdf extension. Acrobat automatically opens the PDF file you created.

Create a PDF from any format

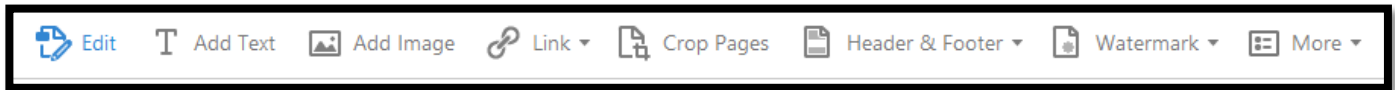


Chapter 11: Edit PDF



Easily correct, update, and add text to PDF files. Reflow paragraphs and correct typos—without returning to your original source document. Use the Add Text tool to fill in non-interactive PDF forms.

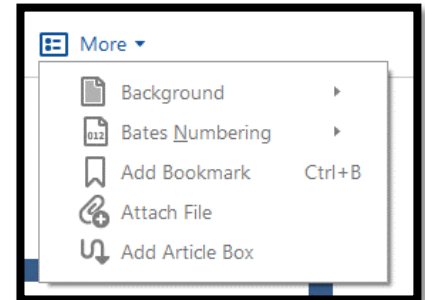
Edit PDF



Edit

The Edit Text & Images tool lets you replace, edit, or add text to a PDF. You can correct typos, change fonts and typeface size, adjust alignment, add superscripts or subscripts, and resize text or paragraphs.

You edit a PDF one page at a time. For more extensive editing or to make global formatting changes across the entire document, edit the original document. If the original isn't available, you can save the PDF as a Microsoft Word document or PowerPoint presentation. Then edit, and re-create the PDF.



When you edit text, the text in the paragraph reflows within its text box to accommodate the changes. Each text box is independent, and inserting text in one text block does not push down an adjacent text box or reflow to the next page.

- **Step 1:** Choose Tools > Edit PDF > Edit
- **Step 2:** Select the text you want to edit.
- **Step 3:** Edit the text by doing one of the following:
 - Type new text to replace the selected text, or press Delete to remove it.
 - Select a font, font size, or other formatting options under Format in the right hand pane. You can also use the advanced format options, such as line spacing, character spacing, horizontal scaling, stroke width, and color.
- **Step 4:** Click outside the selection to deselect it and start over.



Add or remove items from a numbered or bulleted list




You can add items to a numbered or bulleted list.

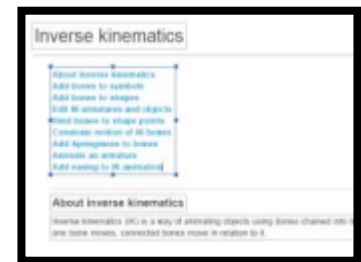
- **Step 1:** Choose Tools > Edit PDF > Edit. The content that is part of a single list is displayed in one bounding box, including the text and the bullets or numbers.
- **Step 2:** You can add or remove items to the list at all nested levels using the same familiar controls that you use in MS Office. For example, press Enter at the end of a list item to insert a new row. Press Backspace to remove the new row and position the cursor back to the end of

previous list item. Upon adding or removing an item to the list, the list formatting adjusts automatically.

Move, rotate, or resize a text box

You can move or rotate text boxes on a page. The Edit Text & Images tool outlines each text box, so it is clear what text is affected. Edits are confined to the page. You cannot drag a text block to another page, or move or rotate individual characters or words within a text box. However, you can copy text boxes and paste them on another page. Resizing a text box causes the text to reflow within the new text box boundaries. It does not change the size of the text. As with other text edits, resizing is limited to the current page. Text does not flow to the next page.

- **Step 1:** Choose Tools > Edit PDF > Edit
- **Step 2:** Click the text box you want to move, rotate, or resize.
- **Step 3:** Do any of the following:
 - **Move:** Place the pointer over the line of the bounding box (avoid the selection handles). When the cursor changes to the Move Pointer , drag the box to the desired location. Hold down the Shift key as you drag to constrain the movement vertically or horizontally.
 - **Rotate:** Place the pointer just outside a selection handle. When the cursor changes to the Rotation  pointer, drag in the direction you want it to rotate.
 - **Resize:** Place the pointer over a selection handle. When the cursor changes to the Resize  pointer, drag the handle to resize the text block.




Add new text to a PDF

You can add or insert new text into a PDF using any of the fonts installed on the system.

- **Step 1:** Select Tools > Edit PDF > Add Text
- **Step 2:** Drag to define the width of the text block you want to add.
- **Step 3:** For vertical text, right-click the text box, and choose Make Text Direction Vertical.
- **Step 4:** The Add text tool intelligently detects the following text properties of text close to the point of click:
 - Font name, size, and color
 - Character, paragraph, and line spacing
 - Horizontal scaling

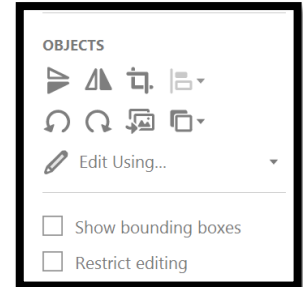
These text properties are automatically applied to the text that you add at the point of click. You can change the text properties using the options under Format in the right hand pane.

- **Step 5:** Type the text.
- **Step 6:** To resize the text box, drag a selection handle.

- **Step 7:** To move the text box, place the pointer over the line of the bounding box (avoid the selection handles). When the cursor changes to Move pointer , drag the box to the new location. To maintain alignment with the other list items, press Shift as you drag.

Add Image

- **Step 1:** Choose Tools > Edit PDF > Add Image
- **Step 2:** In the Open dialog box, locate the file you want to place.
- **Step 3:** Select the image file, and click Open.
- **Step 4:** Click where you want to place the image, or click-drag to size the image as you place it. A copy of the image file appears on the page, with the same resolution as the original file.
- **Step 5:** Use the bounding box handles to resize the image, or the tools in the right hand panel under Objects to Flip, Rotate, or Crop the image.



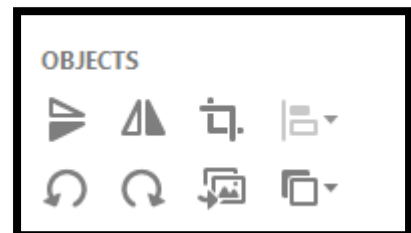
Move or resize an image or object

- **Step 1:** Choose Tools > Edit PDF > Edit. When you hover over an image you can edit, the image icon appears in the top left corner.
- **Step 2:** Do any of the following:
 - To move the image or object, drag it to the desired location. You cannot drag images or objects to a different page (you can cut and paste them to a new page instead). Shift-drag the object to constrain movement vertically or horizontally.
 - To resize the image or object, select it, then drag a handle. Shift-drag the handle to retain the original aspect ratio.

Note: If you select multiple objects, you can move or resize them together.

Rotate, flip, crop (clip), or replace an image

- **Step 1:** Choose Tools > Edit PDF > Edit
- **Step 2:** Select the image (or images)
- **Step 3:** Under Objects in the right hand panel, click one of the following tools:
 - **Flip Vertical:** Flips the image vertically, on the horizontal axis.
 - **Flip Horizontal:** Flips the image horizontally, on the vertical axis.
 - **Rotate Counterclockwise:** Rotates the selected image ninety degrees counterclockwise.
 - **Rotate Clockwise:** Rotates the selected image ninety degrees clockwise.
 - **Crop Image:** Crops or clips the selected image. Drag a selection handle to crop the image.
 - **Replace Image:** Replaces the selected image with the image you choose. Locate the replacement image in the Open dialog, and click Open.



To rotate the selected image manually, place the pointer just outside a selection handle.
When the cursor changes to the rotation pointer, drag in the direction you want it to rotate.

Move an image or object in front or behind other elements


The Arrange options let you move an image or object in front of or behind other elements. You can push an item forward or back just one level, or send it to the front or back of the stacking order of elements on the page.

- **Step 1:** Choose Tools > Edit PDF > Edit
- **Step 2:** Select the object (or objects).
- **Step 3:** Under Objects in the right hand panel, click Arrange and choose the appropriate option. Alternatively, you can right-click the object (or objects), point to Arrange and then choose the appropriate option.



Align images or objects

The Align Objects options let you precisely align multiple objects on a side - Left, Vertical Centre, Right, Top, Horizontal Centre, and Bottom. When you align objects relative to each other by their edges, one of the objects remains stationary. For example, the Left option aligns the left edges of the selected objects with respect to the left edge of the left-most object. The left-most object remains stationary, and the other objects are aligned relative to it. The Horizontal Centre option aligns the selected objects horizontally through the center of the objects, and the Vertical Centre option aligns the selected objects vertically through the centers of the objects. The objects are aligned along a horizontal or vertical line that represents the average of their original positions. An object can remain stationary, if it is already aligned to the horizontal or vertical line. Depending on the alignment option you select, objects move straight up, down, left, or right, and might overlap an object already located there. If you see an overlap, you can undo the alignment.

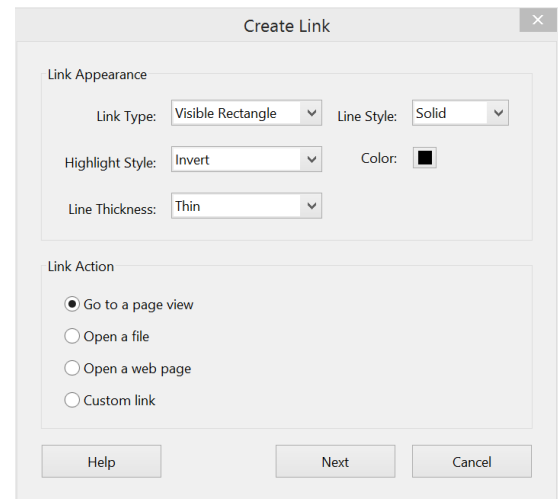
- **Step 1:** Choose Tools > Edit PDF > Edit
- **Step 2:** Select the object (or objects).
- **Step 3:** Under Objects in the right hand panel, click Align Objects  and choose the appropriate alignment option. Alternatively, you can right-click the object (or objects), point to the Align Objects option from the context menu and then select the desired alignment option from the submenu.

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.

Create a link using the Link tool

- **Step 1:** Choose Tools > Edit PDF > Link > Add or Edit. The pointer becomes a cross hair, and any existing links in the document, including invisible links, are temporarily visible.
- **Step 2:** Drag a rectangle where you want to create a link. This is the area in which the link is active.
- **Step 3:** In the Create Link dialog box, choose the options you want for the link appearance.
- **Step 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), 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.

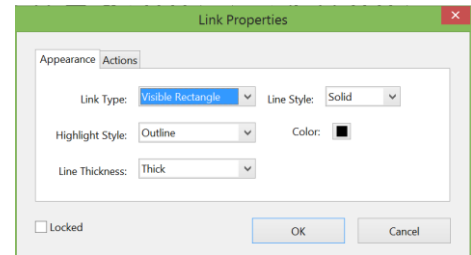
Edit a link

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.

- **Step 1:** Select the Add or Edit link tool (Tools > Edit PDF > Link > Add or Edit)
- **Step 2:** Move the pointer over the link rectangle so that the handles appear.
- **Step 3:** 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

- **Step 1:** Select the Add or Edit link tool (Tools > Edit PDF > Link > Add or Edit).
- **Step 2:** Double-click the link rectangle.
- **Step 3:** In the Appearance tab of the Link Properties dialog box, choose a color, line thickness, and line style for the link.
- **Step 4:** 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.



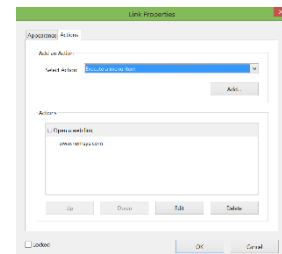
Note: The Link Type, Color, and Line Style options are not available if Invisible is selected for Appearance.

- **Step 5:** 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.
- **Step 6:** Select the Locked option if you want to prevent users from accidentally changing your settings.
- **Step 7:** 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 the link whose properties you want to use as the default, and choose Use Current Appearance As New Default.

Edit a link action

- **Step 1:** Select the Add or Edit link tool (Tools > Edit PDF > Link > Add or Edit).
- **Step 2:** Double-click the link rectangle.
- **Step 3:** In the Actions tab of the Link Properties dialog box, select the listed action you want to change, and click Edit.



Delete a link

- **Step 1:** Select the Add or Edit link tool (Tools > Edit PDF > Link > Add or Edit).
- **Step 2:** Select the link rectangle you want to delete. Choose Edit > Delete, or press the Delete key.

Link to a file attachment

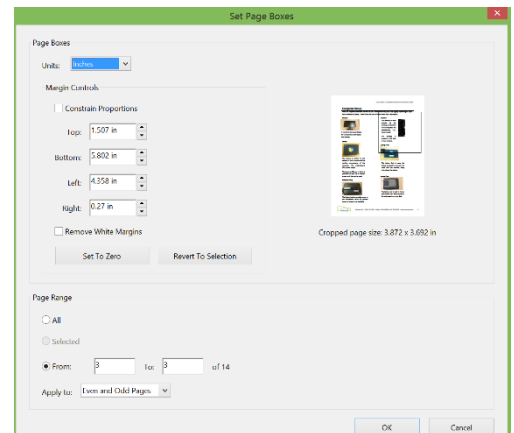
You can direct users to a PDF attachment by creating a link in the parent PDF document that jumps to the attachment. *Note: Don't confuse file attachments with files that can be opened from a link. Linked documents may be stored in different locations; file attachments are always saved with the PDF.*

- **Step 1:** Open a PDF that contains a PDF file attachment.
- **Step 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.
- **Step 3:** Choose Tools > Edit PDF > Link > Add or Edit, and select the area for the link.
- **Step 4:** In the Create Link dialog box, set the link appearance, select Go To A Page View, then click Next.
- **Step 5:** 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.

Crop PDF pages

You can adjust the visible page area using the Crop Pages tool and the Set Page Boxes dialog box. Cropping pages can help you create consistency within a PDF composed of pages of different sizes. *Note: Cropping does not reduce file size because information is merely hidden, not discarded.*

- **Step 1:** Choose Tools > Edit PDF. The Edit PDF toolset is displayed in the secondary toolbar.
- **Step 2:** In the secondary toolbar, click Crop Pages.
- **Step 3:** 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.
- **Step 4:** Double-click inside the cropping rectangle. The Set Page Boxes dialog box opens, indicating the margin measurements of the cropping rectangle and the page to be cropped. You can override the crop area you defined, making new selections in the dialog box before clicking OK.
- **Step 5:** To apply these settings to additional pages, set the page range or click All under Page Range.
- **Step 6:** Click OK to crop the page or pages.



Headers and Footers

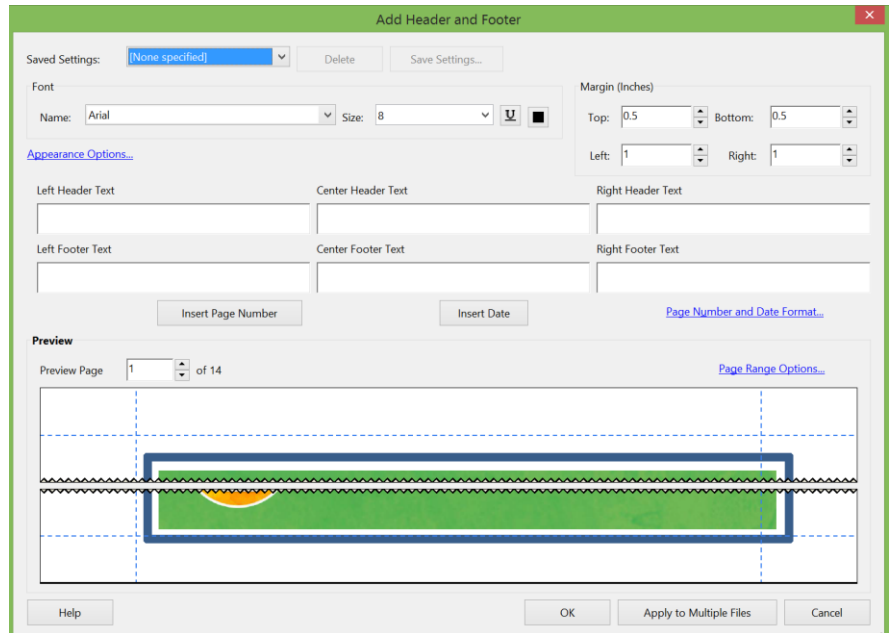
Acrobat DC lets you add a header and footer throughout a PDF. Headers and footers can include a date, automatic page numbering. You can add headers and footers to one or more PDFs. You can vary the headers and footers within a PDF. For example, you can add a header that displays the page number on the right side of odd-numbered pages, and another header that displays the page number on the left side of even numbered pages. 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.

Add headers and footers, with an open document

- **Step 1:** Open the PDF file to which you want to add the header and footer.
- **Step 2:** Choose Tools > Edit PDF. The Edit PDF toolset is displayed in the secondary toolbar.
Note: Formatting and other related options are displayed in the right hand pane.

- **Step 3:** In the secondary toolbar, choose Header & Footer > Add.
- **Step 4:** As needed, specify the Font and Margin values. 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. To prevent overlapping, click the Appearance Options link 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.

- **Step 5:** Type the text in any of the header and footer text boxes. To insert page numbers or the current date, click in a box and then click the corresponding buttons. To select formatting for automatic entries, click Page Number And Date Format. *Note: You can combine text with dates and page numbers. You can also add several lines of text to an entry.*
- **Step 6:** To specify the pages on which the header and footer appear, click Page Range Options. Then specify a page range and choose a Subset option, as needed.
- **Step 7:** Examine the results in the Preview area, using the Preview Page option to see different pages of the PDF.

To save these header and footer settings for future use: Click Save Settings at the top of the dialog box.
To apply the same settings to additional PDFs: Click Apply To Multiple Files. Click Add Files, choose Add

Files or Add Open Files, and select the files. Then in the Output Options dialog box, specify your folder and filename preferences, and click OK.

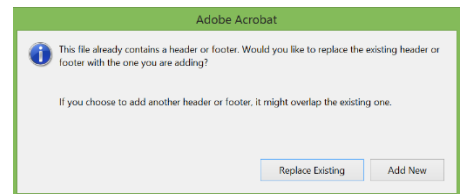
Update the headers and footers

Updating applies to the most recently added header and footer set.

- **Step 1:** Open the PDF file containing header and footer.
- **Step 2:** Choose Tools > Edit PDF.
- **Step 3:** In the secondary toolbar, choose Header & Footer > Update.
- **Step 4:** Change the settings as needed.

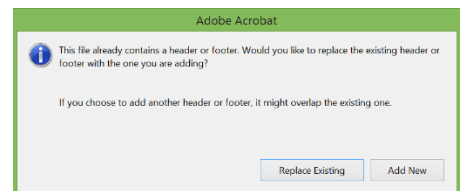
Add another header and footer

- **Step 1:** Open the PDF file containing header and footer.
- **Step 2:** Choose Tools > Edit PDF
- **Step 3:** In the secondary toolbar, choose Header & Footer > Add, and then click Add New in the message that appears. The preview shows any existing headers and footers.
- **Step 4:** Type text in the header and footer text boxes to add more headers and footers. As you type, the preview updates the appearance of the complete headers and footers on the page.
- **Step 5:** Select new formatting options, as preferred, again noticing the updating in the preview.



Replace all headers and footers

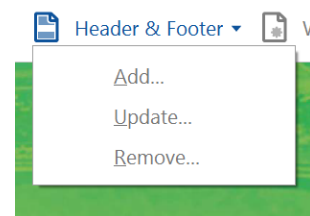
- **Step 1:** Open the PDF file containing header and footer.
- **Step 2:** Choose Tools > Edit PDF.
- **Step 3:** In the secondary toolbar, choose Header & Footer > Add, and then click Replace Existing in the message that appears.
- **Step 4:** Specify the settings, as needed.



Remove all headers and footers

Do one of the following:

- Open the PDF file containing header and footer. Then choose Tools > Edit PDF > Header & Footer > Remove.
- To remove headers and footers from multiple PDFs:
 - **Step 1:** Close any open documents and choose Tools> Edit PDF> Header & Footer > Remove.
 - **Step 2:** In the dialog box, click Add Files, choose Add Files, and select the files.
 - **Step 3:** Click OK, and then in the Output Options dialog box, specify your folder and filename preferences.

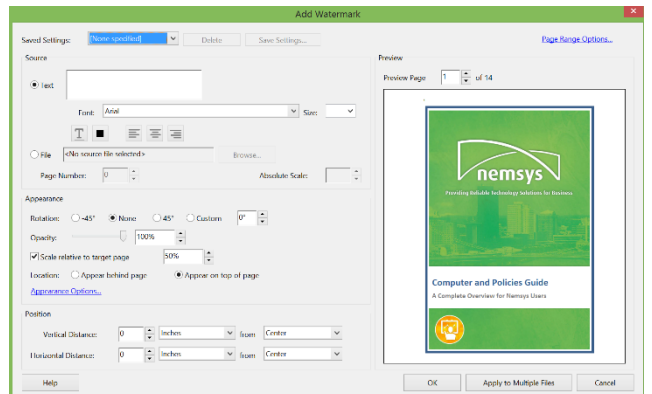
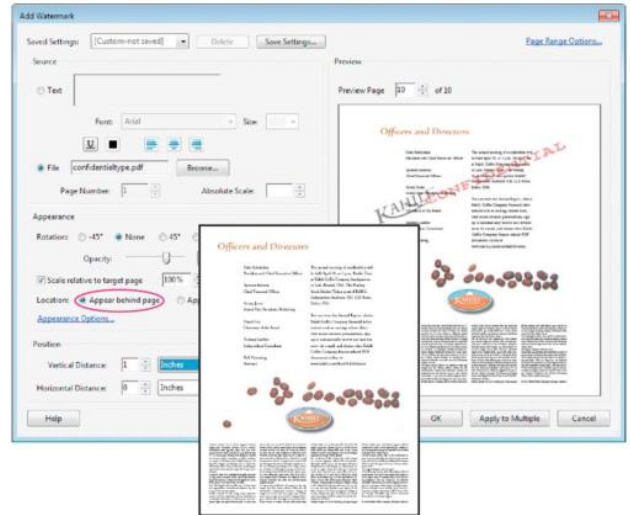


Watermarks

A watermark is text or an image that appears either in front of or behind existing document content, like a stamp. For example, you could apply a “Confidential” watermark to pages with sensitive information. You can add multiple watermarks to one or more PDFs, but you must add each watermark separately. 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 can open to display a text annotation, move, change, or delete.*

Add or replace a watermark, with an open document

- **Step 1:** Choose Tools > Edit PDF > Watermark > Add.
- **Step 2:** (Optional) To apply the watermark selectively to individual pages, click Page Range Options. Then specify a page range and choose a Subset option, as needed.
- **Step 3:** Specify the watermark:
 - To reuse a watermark and watermark options that you saved in an earlier session, select it from the Saved Settings menu.
 - To create a text watermark, select Text, and type the text in the box. Adjust the text formatting options as needed.
 - To use an image as a watermark, select File. Then click Browse and select the image file. If the file has multiple pages with images, specify the Page Number you want.
 - *Note: Only PDF, JPEG, and BMP images can be used as watermarks.*
- **Step 4:** To change the size of an image watermark, do one of the following:
 - To resize the watermark in relation to the original image file size, 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).
- **Step 5:** Adjust the appearance and position of the watermark, as needed.
- **Step 6:** (Optional) Click Appearance Options and specify the following options:
 - To specify when the watermark appears, select or deselect Show When Printing and Show When Displaying On Screen.



- To control variations in a PDF with pages of varying sizes, select or deselect Keep Position And Size Of Watermark Text Constant When Printing On Different Page Sizes.
- **Step 7:** (Optional) To apply the same settings to additional PDFs, click Apply To Multiple Files. Click Add Files, choose Add Files or Add Open Files, and then select the files. Then in the Output Options dialog box, specify your folder and filename preferences, and click OK.

Add or replace a watermark in component PDFs in a PDF Portfolio

- **Step 1:** Select one or more component PDFs in a PDF Portfolio.
- **Step 2:** Follow the steps in the procedure for adding or replacing a watermark with a document open.

Update a watermark

- **Step 1:** Open a single PDF.
- **Step 2:** Choose Tools > Edit PDF > Watermark > Update
- **Step 3:** Make changes to the watermark, and then click OK.

Note: 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.

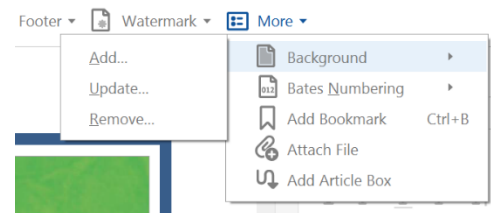
Remove watermarks

Do one of the following:

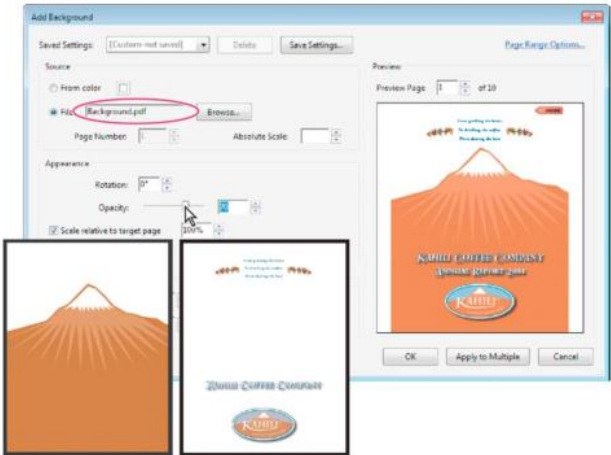
- Open a single PDF, or select one or more component PDFs in a PDF Portfolio. Then choose Tools > Edit PDF > Watermark > Remove.
- To remove watermarks from multiple PDFs, close any open PDFs and choose Tools > Edit PDF > Watermark > Remove. In the dialog box that appears, click Add Files, choose Add Files, and then select the files. Click OK, and then in the Output Options dialog box, specify your folder and filename preferences.

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 one or more PDFs. A PDF supports only one background per page, but the backgrounds can vary from page to page.



Add, replace, or edit a background

- **Step 1:** Open the PDF file to which you want to add the background.
 - **Step 2:** Choose Tools > Edit PDF. The Edit PDF toolset is displayed in the secondary toolbar and other related options are displayed in the right hand pane. *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 remains unchanged on pages outside that range.*
- 
- **Step 3:** In the secondary toolbar, choose More > Background > Add.
 - **Step 4:** (Optional) To apply the background selectively to individual pages, click Page Range Options. Then specify a page range and choose a Subset option, as needed.
 - **Step 5:** Specify the background:
 - To reuse a background and background options that you saved in an earlier session, select it from the Saved Settings menu.
 - To apply a solid color background, select From Color. Then select a color swatch or custom color from the color picker.
 - To use an image, select File, then select the image file. To select a specific image in a multipage file, enter it in Page Number.
 - *Note: Only PDF, JPEG, and BMP files can be used as background images.*
 - **Step 6:** Adjust the appearance and position of the background, as needed.
 - **Step 7:** (Optional) To apply the same background to additional PDFs:
 - Click Apply To Multiple Files.
 - Click Add Files, choose Add Files or Add Open Files, and then select the files.
 - Click OK.
 - In the Output Options dialog box, specify your folder and filename preferences, and 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.

- **Step 1:** Open the PDF file that contains the background you want to update.
- **Step 2:** Choose Tools > Edit PDF. The Edit PDF toolset is displayed in the secondary toolbar.
- **Step 3:** In the secondary toolbar, choose More > Background > Update.
- **Step 4:** Click OK, or make other changes to the background options and then click OK.

Remove a background from selected pages

- **Step 1:** Open the PDF containing the background.
- **Step 2:** Choose Tools > Edit PDF. The Edit PDF toolset is displayed in the secondary toolbar.
- **Step 3:** In the secondary toolbar, choose More > Background > Remove.
- **Step 4:** Click Yes to confirm the background removal.

Bookmarks

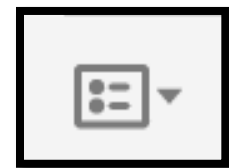
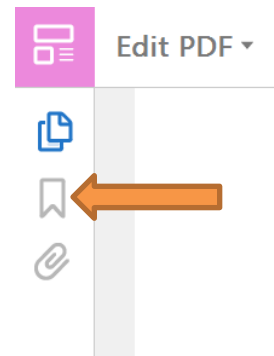
A bookmark is a type of link with representative text in the Bookmarks panel in the navigation pane. Each bookmark goes to a different view or page in the document. Bookmarks are generated automatically during PDF creation from the table-of-contents entries of documents created by most desktop publishing 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.

In Acrobat, you can set bookmark destinations as you create each bookmark. However, it is sometimes easier to create a group of bookmarks, and then set the destinations later. In Acrobat, 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: An Acrobat user can add bookmarks to a document only if the security settings allow it.*

Create a bookmark

- **Step 1:** Click the Bookmarks button on the left to open the Bookmarks panel. Or: Choose Tools > Edit PDF > More > Add Bookmark.
- **Step 2:** Open the page where you want the bookmark to link to, and adjust the view settings.
- **Step 3:** Use the Select tool to select the area of the page you want to bookmark:
 - To bookmark a single image, click in the image, or drag a rectangle around the image.
 - To bookmark a portion of an image, drag a rectangle around the portion.
 - To bookmark text, drag to select it. The selected text becomes the label of the new bookmark. You can edit the label.
- **Step 4:** 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.
- **Step 5:** In the Bookmarks panel, right click to select Bookmark and type or edit the name of the new bookmark.



Rename a bookmark

Select the bookmark in the Bookmarks panel, choose Rename Bookmark in the options menu, and type the new bookmark name.

Print bookmarks only

Select Bookmark Menu and select Print Page(s)

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.

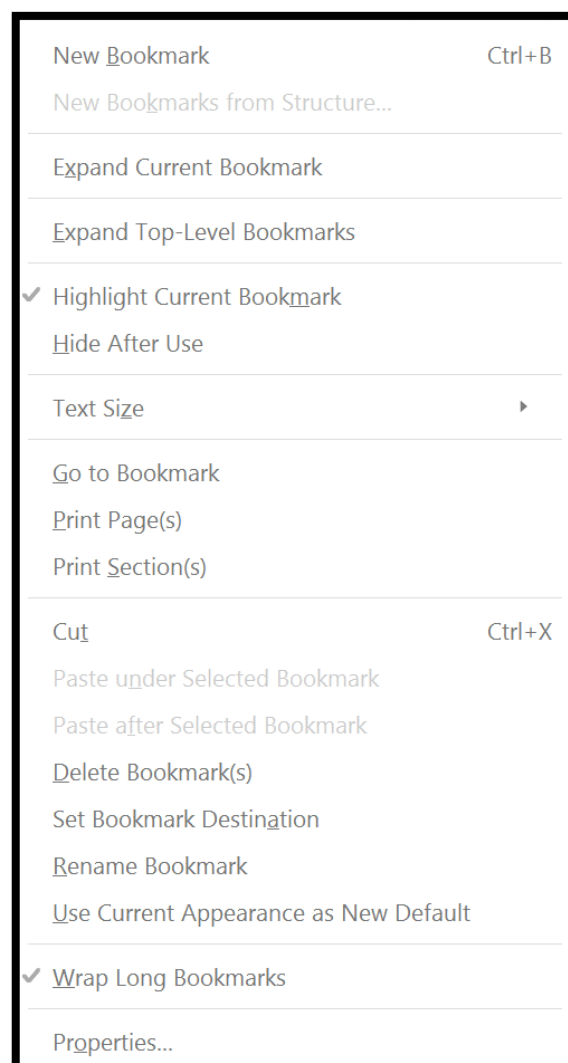
- **Step 1:** In the Bookmarks panel, select one or more bookmarks.
- **Step 2:** To change the color and style of the text, choose View > Show/Hide > Toolbars Items > Properties Bar. *After you have defined a bookmark's appearance, you can reuse the appearance settings. To do this, select the bookmark and from the options menu, choose Use Current Appearance As New Default.*
- **Step 3:** To change the font size, from the options menu, choose Text Size > [size].

Change a bookmark's destination

- **Step 1:** In the Bookmarks panel, select the bookmark.
- **Step 2:** In the document pane, move to the location you want to specify as the new destination.
- **Step 3:** If necessary, adjust the view magnification.
- **Step 4:** Choose Set Bookmark Destination in the options menu. *Note: The Set Bookmark Destination option is context sensitive. It appears only when you have an existing bookmark selected.*

Add an action to a bookmark

- **Step 1:** In the Bookmarks panel, select a bookmark.
- **Step 2:** From the options menu, choose Properties.
- **Step 3:** In the Bookmark Properties dialog box, click Actions.
- **Step 4:** Choose an action from the Select Action menu, and click Add.



Delete a bookmark

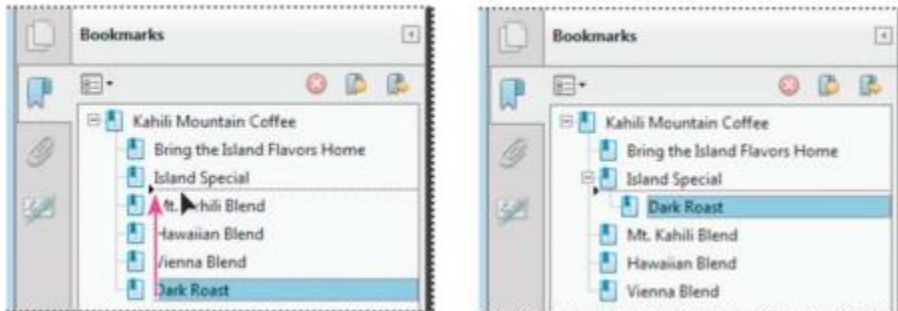
In the Bookmarks panel, select a bookmark or range of bookmarks, and then press Delete. *Note: Deleting a bookmark deletes any bookmarks that are subordinate to it. Deleting a bookmark does not delete any document text.*

Create a bookmark hierarchy

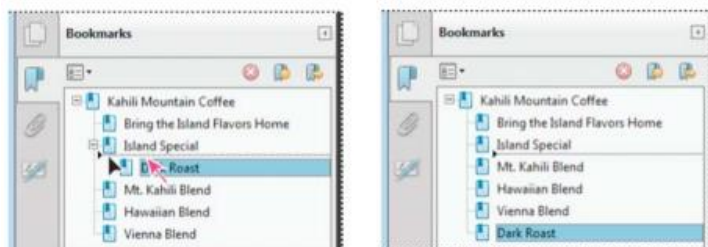
You can nest a list of bookmarks to show a relationship between topics. Nesting creates a parent/child relationship. You can expand and collapse this hierarchical list as desired.

Nest one or more bookmarks

- **Step 1:** Select the bookmark or range of bookmarks you want to nest.
- **Step 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.

Move bookmarks out of a nested position

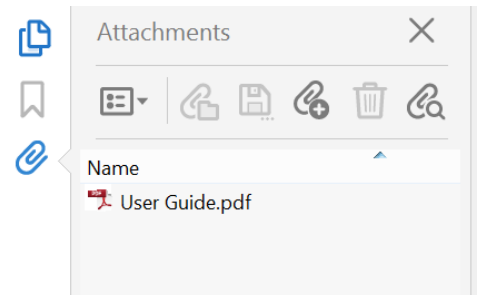
- **Step 1:** Select the bookmark or range of bookmarks you want to move.
- **Step 2:** Move the selection by doing one of the following:
 - Drag the icon or icons, positioning the arrow directly under the label of the parent bookmark.
 - Choose Cut from the options menu, select the parent bookmark, and then choose Paste Under Selected Bookmark from the options menu.

Expand or collapse all top-level bookmarks

From the options menu, choose Expand Top-Level Bookmarks or Collapse Top-Level Bookmarks.

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. A file attached as a comment appears in the page with a File Attachment icon or Sound Attachment icon, and in the Comments List with other comments. (See [Add comments in a file attachment](#).)



- **Step 1:** Choose Tools > Edit PDF > More > Attach File.
- **Step 2:** In the Add Files dialog box, select the file you want to attach, and click Open. *Note: If you attach EXE, VBS, or ZIP file formats, 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.*
- **Step 3:** Save the PDF.
- **Step 4:** (Optional) To add a description to the attachment that helps differentiate between similar files in the Attachments panel, select the attached file, and from the options menu, choose 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. *Note: Acrobat does not open EXE, VBS, and ZIP file formats because these formats are associated with malicious programs, macros, and viruses that can damage your computer.*

- **Step 1:** To open the Attachments panel, choose View > Show/Hide > Navigation Panes > Attachments.
- **Step 2:** In the Attachments panel, select the attachment.
- **Step 3:** Click the appropriate icon to open the attachment in its native application, save the attachment, or delete it:

Search in attachments

When searching for specific words or phrases, you can include attached PDFs as well as several other file types in the search. Windows users can search Microsoft Office documents (such as .doc, .xls, and .ppt), AutoCAD drawing file formats (.dwg and .dwt), HTML files, and Rich Text Format (.rtf) files. 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 attachments from the Attachments panel

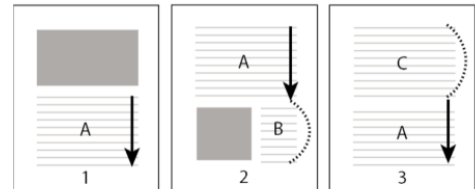
- **Step 1:** To open the Attachments panel, choose View > Show/Hide > Navigation Panes > Attachments.
- **Step 2:** In the Attachments panel, click Search Attachments.
- **Step 3:** In the Search window, type the word or phrase that you want to search for, select the results option you want, and then click Search Attachments.

Search attachments from the Search window

- **Step 1:** Choose Edit > Advanced Search
- **Step 2:** Type the word or phrase that you want to search for, and select the results option you want.
- **Step 3:** Click Show More Options at the bottom of the window, and then select Include Attachments.

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.

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.*

- **Step 1:** Choose Tools > Edit PDF > More > Add Article Box. The pointer appears as a cross-hair pointer in the document window.
- **Step 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.
- **Step 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.*
- **Step 4:** To end the article, press Enter.

- **Step 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 > Edit PDF > More > Add Article Box.

View articles in the PDF

- **Step 1:** Choose View > Show/Hide > Navigation Panes > Articles.
- **Step 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.
- **Step 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

- **Step 1:** 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 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

- **Step 1:** In the Document window, select the article box that you want the new article box to follow.
- **Step 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.
- **Step 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

- **Step 1:** 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.



Edit article properties

- **Step 1:** Using the Article tool, select the article box that you want to edit.
- **Step 2:** Right-click the box and choose Properties.

- **Step 3:** Change the information in the Articles Properties dialog box and click OK.

Combine two articles

- **Step 1:** In the document pane, select any article box in the article you want to be read first.
- **Step 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.
- **Step 3:** Ctrl-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

Chapter 12: Saving PDFs

Saving PDFs

You can save your changes to an Adobe PDF or PDF Portfolio in the original PDF or in a copy of the PDF. You can also save individual PDFs to other file formats, including text, XML, HTML, and Microsoft Word. Saving a PDF in text format allows you to use the content with a screen reader, screen magnifier, or other assistive technology.

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. You can also export the PDF to a reusable format, or export images in a PDF to another format.

Adobe Acrobat Reader DC users can save a copy of a PDF or PDF Portfolio if the creator of the document has enabled usage rights. If a document has additional or restricted usage rights, the document message bar under the toolbar area describes the assigned restrictions or privileges.

Save a PDF

Use this method to save PDFs, including PDF Portfolios, and PDFs in which you have added comments, form field entries, and digital signatures.

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

❖ Do one of the following:

- To save changes to the current file, choose File > Save.
- To save a copy of a PDF, choose File > Save As.
- In Acrobat Reader DC, choose File > Save As or File > Save As Other > Text.
- To save a copy of a PDF Portfolio, choose File > Save As Other > PDF Portfolio.

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

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 the 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 adding comments.

Note: *The Apply To Multiple button is not available in PDF Portfolios.*

- To control changes and quality trade-offs, use PDF Optimizer in Acrobat Pro DC, which makes more options available.

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 has its security changed. You must save the document to re-enable automatic saving of document changes.
- A document created using the Web Capture feature or extracted from a larger PDF (Tools > Organize Pages > Extract). 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, enable the Autosave feature, which is the default setting.

Set up automatic saving

- **Step 1:** In the Preferences dialog box under Categories, select Documents.
- **Step 2:** Select Automatically Save Document Changes To Temporary File Every xx Minutes (1-99), and specify the number of minutes.

Recover lost changes after an unexpected shutdown

- **Step 1:** Start Acrobat or open the file you were working on last.
- **Step 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.
- **Step 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 Other command. Reducing the size of PDFs improves their performance—particularly when they’re being opened on the web—without altering their appearance.

The Reduce File Size command resamples and recompresses images, removes embedded Base-14 fonts, and subset-embeds fonts that were left embedded. It also 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.

- **Step 1:** Open a single PDF, or select one or more PDFs in a PDF Portfolio.
- **Step 2:** Choose File > Save As Other > Reduced Size PDF
- **Step 3:** Select the version compatibility that you need.
- If you’re certain that all your users use Acrobat DC or Adobe Acrobat Reader DC, limiting compatibility to the latest version can further reduce file size.
- **Step 4:** (Optional) To apply the same settings to multiple files, click Apply To Multiple, and add the files. Click OK, then in the Output Options dialog box, specify your folder and file name preferences.
 - **Note:** The Apply To Multiple button is not available in PDF Portfolios.

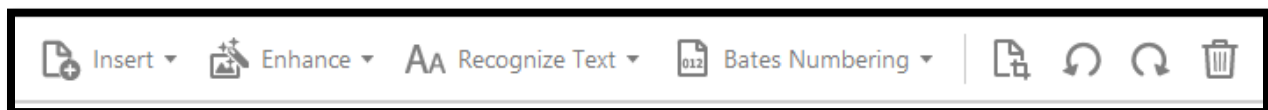
To control changes and quality trade-offs, use PDF Optimizer in Acrobat Pro DC, which makes more options available.

Chapter 13: Enhance Scans



Enhance Scans

Scan a paper document to PDF and turn it into a smart, searchable PDF with selectable text.

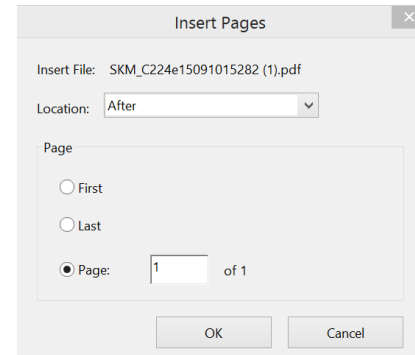


- **Step 1:** In main toolbar, select FILE → OPEN → Navigate to folder scanned image is located in and select it → click OPEN

Insert

Allows you to insert other scanned or saved pages.

Once selected, a pop up window will ask where you want to locate your insert.

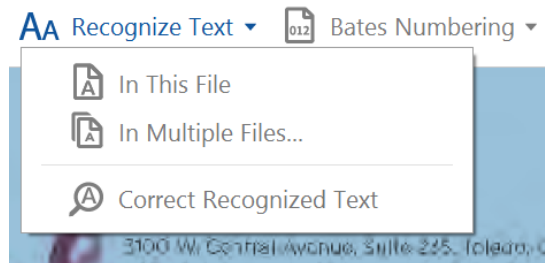


Enhance

The Enhance Scanned PDF dialog box controls the image settings of 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.

Recognize Text

You can use Acrobat DC to recognize text in previously scanned documents that have already been converted to PDF. Optical character recognition (OCR) software enables you to search, correct, and copy the text in a scanned PDF. To apply OCR to a PDF, the original scanner resolution must have been set at 72 dpi or higher.



Recognize text in a single document

- **Step 1:** Open the scanned PDF.
- **Step 2:** Choose Tools > Enhance Scans > Recognize Text > In This File. The Recognize Text options are displayed in the Secondary toolbar.
- **Step 3:** In the Secondary toolbar, select a page range and language for text recognition.
- **Step 4:** Optionally, click Settings to open the Recognize Text dialog box, and specify the options as needed.
- **Step 5:** Click Recognize Text. Acrobat creates a layer of text in your PDF that can be searched — or copied and pasted into a new document.

Recognize text in multiple documents

- **Step 1:** Choose Tools > Enhance Scans > Recognize Text > In Multiple Files
- **Step 2:** In the Recognize Text dialog box, click Add Files, and choose Add Files, Add Folders, or Add Open Files. Then select the files or folder.
- **Step 3:** In the Output Options dialog box, specify a target folder for output files, and filename preferences.

- **Step 4:** In the Recognize Text - General Settings dialog box, specify the options, and then click OK. Acrobat creates a layer of text in your PDF that can be searched — or copied and pasted into a new document.

Correct OCR text in PDFs

When you run OCR on a scanned output, Acrobat DC analyzes bitmaps of text and substitutes words and characters for those bitmap areas. If the ideal substitution is uncertain, Acrobat DC 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 method makes the word searchable even though it is displayed as a bitmap. *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 DC asks if you want to run OCR. If you click OK, the Text Recognition dialog box opens and you can select options, which are described in detail under the previous topic.*

- **Step 1:** Choose Tools > Enhance Scans > Recognize Text > Correct Recognized Text. Acrobat DC identifies suspected text errors and displays the image and text side by side in the Secondary toolbar. (All suspect words on the page are enclosed in boxes.)
Step 2: Click the highlighted object or box in the document, and then correct it in the Recognized As box in the Secondary toolbar. Click Accept. The next suspect is highlighted. Correct mistakes as needed. Click Accept for each correction.
Step 3: Click Close in the Secondary toolbar when the task is complete.

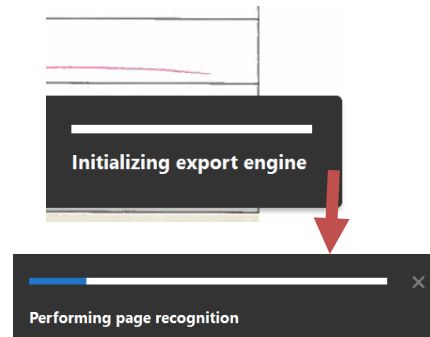
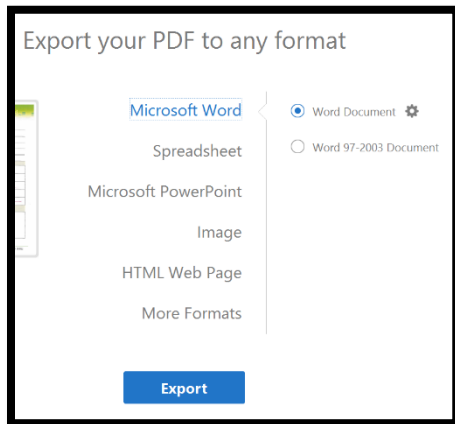
Chapter 14: Export PDF



PDF's can be exported to multiple formats, depending on what you need.

Export PDF

- **Step 1:** Choose Tools > Export PDF.
- **Step 2:** The various formats to which you can export the PDF file are displayed.
- **Step 3:** Select the file format to which you want to export the PDF file and a version (or format), if available. *For example, if you choose to export the PDF file to Word format, you will get an option to export the PDF into Word Document (.docx) or Word 97-2003 Document (.doc) version.*
- **Step 4:** Click Export. The Export dialog box is displayed.
- **Step 5:** In the Export dialog box, select a location where you want to save the file.
- **Step 6:** File will open in new document version. *Note: All formatting may not come over exact.*



Chapter 15: Fill and Sign

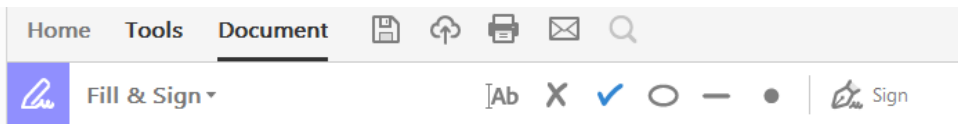



Fill & Sign

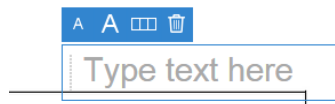
The Fill & Sign tool gives you an easy way to work with paper forms or PDFs that haven't been optimized for form filling. You can save frequently used information securely in your personal autofill collection. Next time, just drag and drop information to complete forms faster. Sign your form by typing or drawing your signature, or using an image. Send your completed forms to others and store the forms securely in Adobe Document Cloud.

Fill out your PDF form

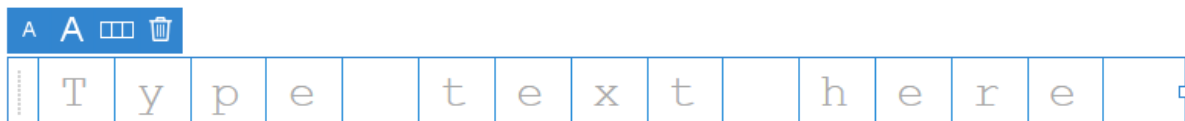
- **Step 1:** Open the PDF form that you want to fill out.
- **Step 2:** Choose Tools → Fill & Sign.



- **Step 3:** To fill or add text, click Add Text  in the toolbar. Click at the place in your document where you want to add the text, and then start typing.



- **Step 4:** Use the field toolbar to make appropriate changes:
 - To resize a field, use the font up or down button in the toolbar - the first two buttons from left
 - To move a field, move your mouse pointer closer to the field border until you see the drag handle, and then hold and move the field as required.
 - To delete a field or typed text, click the trash button.
 - To convert a normal text field into comb field or vice versa, click the comb button - the second button from right.
 - Use Comb fields to fill or add text in continuous boxes in a line/row. The Comb field spreads the user-entered text evenly across the width of the text field, as shown below.
 - While you are typing, if the characters do not fit in each box, adjust the spacing with the grab handle.



- **Step 5:** Add annotations or symbols: Annotations tools are displayed in the toolbar - Crossmark, Checkmark, Circle, Line, and Dot. You can use these annotation tools to fill in check boxes and radio buttons, as well as use the Circle to circle text or the line to strike out text.



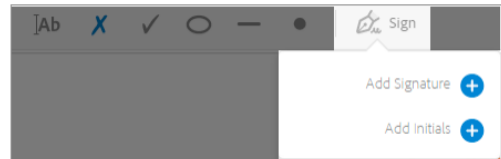
Click an annotation in the toolbar to select it, and then click on the form where you want to place the annotation. (Each click will place the selected annotation at the respective location on the form.)

**Resize the first annotation you place to fit the check box or radio button in the document, and the next annotations you add will be of the same size and will fit the rest of the box/circle fields

Sign or Initial your form

To sign a PDF form, you can type, draw, or insert an image of your handwritten signature or initials.

- **Step 1:** Open the PDF document or form that you want to sign.
- **Step 2:** Choose Tools → Fill & Sign.
- **Step 3:** Click the Sign icon in the toolbar, and then choose whether you want to add your signature or just initials.
- **Step 4:** If you have already added signatures or initials, they are displayed as options to choose from. Select appropriate option from the Sign options, and then click at the place in the PDF where you want to add your signature. If you are signing for the first time, you see the Signature or Initials panel. Below is an example of the Signature panel.



- **Type:** Type your name in the field. You can choose from a small selection of signature styles; click *Change Style* to view a different style.
- **Draw:** Draw your signature in the field.
- **Image:** Browse and select an image of your signature.
- **Save Signature:** When this check box is selected, and you're signed in to Acrobat Reader DC or Acrobat DC, the added signature is saved securely in Adobe Document Cloud for reuse. Click Apply, and then click at the place in the PDF where you want to place the signature or initial.
- **Step 5:** To move the placed signature or initial, click the field to highlight it and then use the arrow keys. To resize or delete the field, use the options in field toolbar.

Form Tracker

Use Tracker to manage the forms that you have distributed or received. Tracker allows you to view and edit the location of the response file, track which recipients have responded, add more recipients, email all recipients, and view the responses for a form.

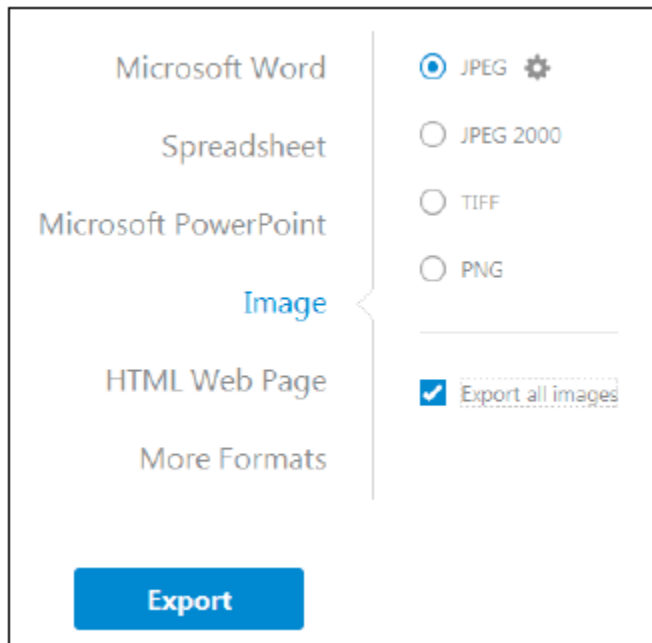
- **Step 1:** Choose Edit > Form Options > Track.
- **Step 2:** In the left navigation panel, expand Forms.
- **Step 3:** Select a form and do one of the following:
 - To view all responses for a form, click View Responses.
 - To modify the location of the response file, in Responses File Location, click Edit File Location
 - To view the original form, click Open Original Form.
 - To send the form to more recipients, click Add Recipients.

Export images in a PDF 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 > Export To > Image > [Image Type]** command, you can export each image in a PDF to a separate image file.

Note: You can export raster images (gif/jpeg), but not vector objects.

- **Step 1:** Choose **Tools > Export PDF**.
 - The various formats to which you can export the PDF file are displayed.
- **Step 2:** Click **Image** and then choose the image file format that you want to save the images in.



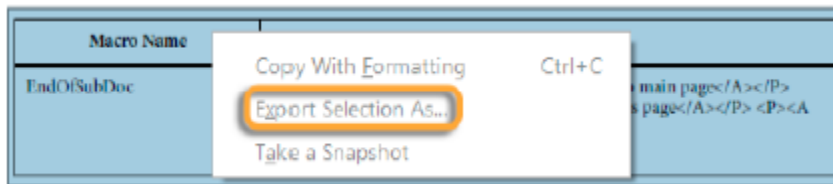
- **Step 3:** To configure the conversion settings for the selected file format, click the gear icon.

- **Step 4:** In the **Export All Images As** [selected file format] **Settings** dialog box, specify the **File Settings**, **Color Management**, **Conversion**, and **Extraction** settings for the file type.
- **Step 5:** In the **Extraction** settings, for **Exclude Images Smaller Than**, select the smallest size of image to be extracted. Select **No Limit** to extract all images.
- **Step 6:** Click **OK** to return to the **Export Your PDF To Any Format** screen.
- **Step 7:** Select the **Export All Images** option to extract and save only the images from the PDF file.
 - **Note:** If you do not select the *Export All Images* option, all pages within the PDF are saved in the selected image file format.
- **Step 8:** Click **Export**. The Export dialog box is displayed.
- **Step 9:** In the **Export** dialog box, select a location where you want to save the file.
- **Step 10:** Click **Save** to save only the images from the PDF to the selected file format.

Export selections from a PDF to another format

If you need just a part of the PDF file in another format, you don't need to convert the entire file and then extract the relevant content. You can select text in a PDF file and save it in one of the supported formats: DOCX, DOC, XLSX, RTF, XML, HTML, or CSV.

- **Step 1:** Use the Select tool and mark the content to save.
- **Step 2:** Right-click the selected text and choose **Export Selection As**.



- **Step 3:** Select a format from the **Save As Type** list and click **Save**.

Chapter 16: Reusing PDF Content

Select and copy text and images

The Select tool lets you select horizontal and vertical text or columns of text, images, vector objects, and tables in a PDF. The Select tool recognizes the type of content under the cursor and changes automatically. You can use the Copy, Copy with Formatting, Export Selection As, and Paste commands to copy the selected text into another application. Note the following:

- If you're unable to select text, the text may be part of an image. In Acrobat, to export image text to text that can be selected, choose Tools > Enhance Scans > Recognize Text > In This File.
- If the Cut, Copy, Copy with Formatting, 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 and images

- **Step 1:** Click the Select tool, and hover over an empty part of the page. Alternatively, press Ctrl (Windows) or Command (Mac OS); the pointer changes to display a rectangle.
- **Step 2:** Drag the pointer and draw a rectangle to select a part of the page.

Select a column of text

- **Step 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 Alt as you drag a rectangle over the column of text.
- **Step 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

- **Step 1:** Choose View > Page Display > Single Page View.
- **Step 2:** Do one of the following:
 - Choose Edit > Select All.
 - 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

- **Step 1:** Use the Select tool to select any amount of text on the page.

- **Step 2:** Copy the text:
 - Choose Edit > Copy to copy the selected text to another application. Right-click on the selected text, and then select Copy.
 - Right-click on the selected text, and then choose Copy With Formatting.
 - You can paste copied text into comments and bookmarks as well as into documents authored in other applications.

Convert selected content to other formats

You convert selected content other formats by exporting a selection. For example, you can select content and save it as a Word document, Excel spreadsheet, comma-separated values.

- **Step 1:** Click the Select tool. Press Ctrl (Windows) or Command (Mac OS) to create a rectangular selection.
- **Step 2:** Drag a rectangle over the content to copy. If you're selecting text in columns, press Alt.
- *To select tables that exceed one page, try changing the page display to Single Page Continuous before selecting the tables. (View > Page Display > Enable Scrolling)*
- **Step 3:** Right-click the selection, and choose Export Selection As and specify a file name.
- **Step 4:** Depending on the nature of the content, in the Save As Type, choose one of the following:
 - **Word Document or Word 97-2003** Saves the content as a Word file.
 - **Excel Workbook, XML Spreadsheet, or CSV** Saves the content as a table.
 - **Rich Text Format or HTML** saves the content as an RTF or HTML file.
 - *To copy a table in RTF, drag the selected table into an open document in the target application.*
 - **PowerPoint** Saves the content as a PowerPoint (.pptx) file.

Copy images

Use the Select tool to copy and paste individual images from a PDF to the clipboard, to another application, or to a file.

If you cannot select an image because of overlapping text, open the Preferences dialog box, and under Categories, select General. Then select Make Select Tool Select Images Before Text.

- **Step 1:** Using the Select tool , do one of the following:
 - To select the entire image, click the image or drag a rectangle around it.
 - To select a portion of an image, hold the pointer over the image until the cross-hair icon appears, and then drag a rectangle around the portion.
 - **Note:** *To deselect an image and start over, click outside it.*
- **Step 1:** Copy the image:

- Choose Edit > Copy, and then choose Edit > Paste to paste the image in an open document in another application.
- Right-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.

Export objects to separate PDF

Using the Edit Object tool, you can save objects into a separate PDF.

- **Step 1:** Choose Tools > Print Production > Edit Object.
- **Step 2:** Select the object or objects.
- **Step 3:** Right-click the selection, and choose Save Selection As.
- **Step 4:** In the Save As dialog, specify where you want to save the file, name the file, then click Save.

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.

You can use two methods to take a snapshot: use the Select tool or use the Snapshot tools. Using the Select tool, draw a rectangle, and then right-click and choose Take a Snapshot.

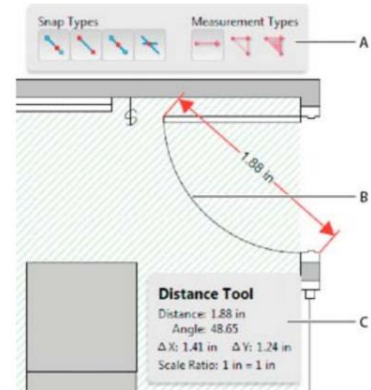
To use the Snapshot tool, do the following:

- **Step 1:** Select the Snapshot tool by choosing Edit > Take a Snapshot.
- **Step 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.
- *To add the Snapshot tool to the Common Tools toolbar, right-click the toolbar and select Edit > Take Snapshot. The Common Tools toolbar is located to the left of the Tools, Comment, and Share panes. See Toolbars.*








Chapter 17: Measure

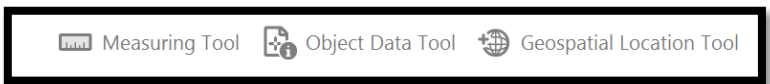
Use the measuring tools to measure distances and areas of objects in PDF documents. The measuring tools are useful for showing the distances and areas associated with objects in a form or computer-aided design (CAD) drawing. You can also use these tools to measure certain areas of a document before sending it to a professional printer. The measuring tools are available to Acrobat Reader DC users only if the PDF creator enables measuring functionality.

When you use a measuring tool, the Measurement Info panel shows information about the measurement, such as current measurement, delta values, and scale ratio. Acrobat DC inserts comments with the values calculated for distance, perimeter, or area.



Measure the height, width, or area of objects

- **Step 1:** Choose Tools > Measure. The measurement toolset is displayed in the secondary toolbar.
- **Step 2:** In the secondary toolbar, click Measuring Tool. The Measuring toolbar and the Measurement Info panel are displayed.
- **Step 3:** To measure areas of your PDF document, select any of the following measurement types:
 - Select the Distance tool  to measure the distance between two points. Click the first point, move the pointer to the second point, and click again.
 - 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.
 - 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.
- **Step 4:** While measuring objects, do any of the following:
 - To snap the measurement to the end of a line, select Snap To Paths .
 - To snap the measurement to the endpoint of a line, select Snap To Endpoints .
 - To snap the measurement to the midpoint of a line, select Snap To Midpoints .
 - To snap the measurement to the intersection of multiple lines, select Snap To Intersections .
 - To constrain the measurement lines to increments of 45°, hold down the Shift key.
 - To discontinue a measurement, right-click and choose Cancel Measurement.
 - To delete a measurement markup, click it with the Measurement Tool and press the Delete key.



Measuring tool options

To set measuring tool options, select the tool, then right-click anywhere in the PDF to view the options.

- **Change Scale Ratio:** Change the scaling ratio (such as 3:2) and unit of measurement on the drawing areas.
- **Change Markup Label:** Add or change text that appears with the measurement.
- **Disable/Enable Measurement Markup:** *When enabled*, the measurement lines you draw are added to the PDF. *When disabled*, the measurement lines disappear when you measure another object or select another tool.
- **Turn Ortho On/Off:** When enabled, measurement lines are orthographic only.
- **Show/Hide Rulers:** Show or hide vertical and horizontal rulers on the page. (Has the same effect as choosing View > Show/Hide > Rulers & Grids > Rulers.)
- **Snap To Page Content/Don't Snap To Page Content:** Turn all Snap Enables on or off.
- **Export Measurement Markup To Excel:** Save the information for all the measurements in your PDF to a CSV file.
- **Preferences:** Open the Measurement (2D) preferences.

Measuring preferences

Change the 2D Measuring preferences to determine how 2D data is measured. *Note: In Acrobat Reader DC, Measuring preferences apply to PDFs that have commenting enabled.*

- **Use Scales And Units From Document (When Present):** When enabled, measurements based on the units generated from the original document, if present, are used. Deselect this option to specify the units of measurements manually.
- **Use Orthographic Lines:** When enabled, measurement lines are orthographic only.
- **Measuring Line Color:** Specifies the color or the line that appears while drawing.
- **Enable Measurement Markup:** When enabled, the measurement lines you draw are added to the PDF. When disabled, the measurement lines disappear when you measure another object or select another tool. You can use the default measurement labels or specify your own label.
- **Use Default Leader Length (Distance Tool only):** When deselected, each time you draw a distance measurement, you move the mouse to determine the leader length.
- **Default Line Ending (Distance Tool only):** Specifies the appearance of the line endings in distance measurements.
- **Caption Style (Distance Tool only):** Specifies whether the distance measurement caption is Inside or on Top of the measurement line.
- **Default Leader Length (Distance Tool only):** Specifies the length of the line leader that appears on one side of the measurement points.
- **Default Leader Extension Above Line (Distance Tool only):** Specifies the length of the leader extension that appears above the measurement line.
- **Default Leader Offset From Line Points (Distance Tool only):** Specifies the amount of blank space that appears between the measurement points and the leader.

- **2D Snap Settings:** Specify snap behavior. Sensitivity indicates how close the pointer must be to the item being snapped to. Snap Hint Color specifies the color of the snap line that appears when you hold the pointer over the object.

Object Data

View object data and metadata. You can view the metadata information of certain objects, tags, and images within a PDF.

View and edit Visio object metadata

- **Step 1:** Choose Tools > Measure > Object Data Tool.
- **Step 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.*
- **Step 3:** To edit the metadata, type in the boxes at the bottom of the Model Tree.
- **Step 4:** To export object metadata, from the options menu, choose Export As XML > Whole Tree to export all objects in the Model Tree, or choose Export As XML > Current Node to export only the selected object and its children. Name and save the file.

Export Visio object metadata

- **Step 1:** Choose Tools > Measure > Object Data Tool.
- **Step 2:** Double-click an object on the page to show its metadata.
- **Step 3:** From the options menu, choose 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.
- **Step 4:** Name and save the file.

Chapter 18: Optimize PDF

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. *Note: 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.

Open the PDF Optimizer

In a single PDF, choose File > Save As Other > Optimized PDF.

Audit the space usage of a PDF

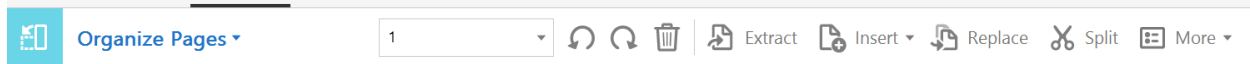
Auditing the space usage gives you a report of the total number of bytes used for specific document elements, including fonts, images, bookmarks, forms, named destinations, and comments, as well as the total file size. The results are reported both in bytes and as a percentage of the total file size.

- **Step 1:** Choose File > Save As Other > Optimized PDF. The PDF Optimizer dialog box opens.
- **Step 2:** Click the Audit Space Usage button at the top of the dialog box.

You can also audit space usage of a PDF in the Content pane. Choose View > Show/Hide > Navigation Panes > Content. From the Content pane options menu, choose Audit Space Usage

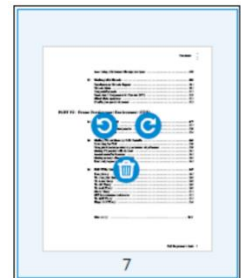
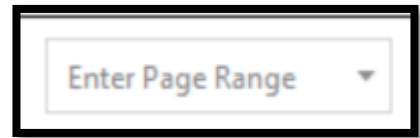
Chapter 19: Organize Pages

Rotate pages



You can rotate all or selected pages in a document. Rotation is based on 90° increments. You can rotate pages using the rotate tools in the Page Thumbnails pane or using the Rotate option (described below).

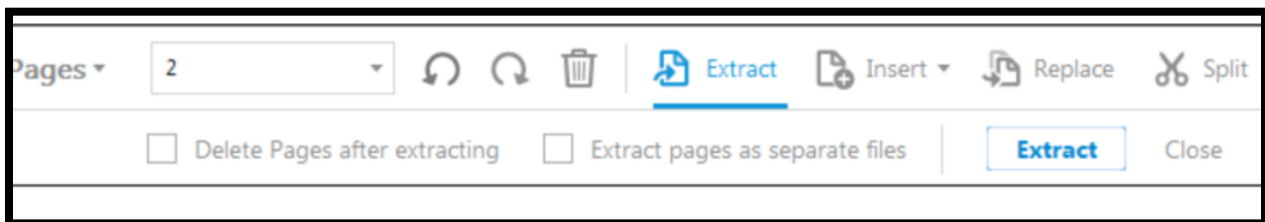
- **Step 1:** Choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar.
- **Step 2:** In the secondary toolbar, specify the page range on which you want to apply the rotation. You can choose Even Pages, Odd Pages, Landscape Pages, Portrait Pages, All Pages, or enter the page number you want to perform the operation on.
- **Step 3:** After specifying the page range, for Direction, select the counterclockwise 90 Degrees or clockwise 90 Degrees .
- **Step 4:** You can also apply the page rotation on a specific page by clicking the counterclockwise or clockwise rotation buttons displayed in the page thumbnail view.



Extract pages

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.*

- **Step 1:** Open the PDF in Acrobat DC and choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar.
- **Step 2:** In the secondary toolbar, click Extract. A new toolbar appears below the secondary toolbar with the commands specific to the Extract operation.



- **Step 3:** Specify the range of pages to extract. You can choose Even Pages, Odd Pages, Landscape Pages, Portrait Pages, All Pages, or enter the page number you want to perform the operation on.
- **Step 4:** In the new toolbar, do one or more of the following before you click Extract:
 - **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. The extracted pages are placed in a new document.

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 the Security tab.

Insert

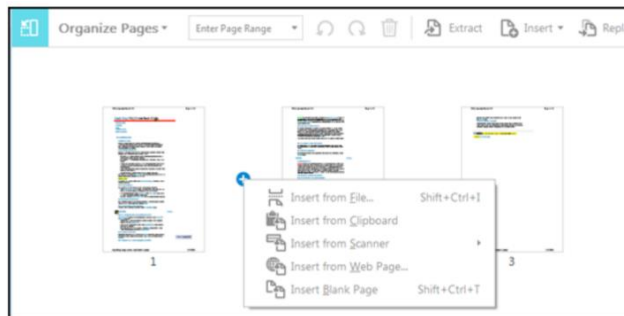
Blank Page

To add a blank page to an existing PDF, open the PDF and then choose Tools > Organize Pages > Insert > Blank Page.

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.

- **Step 1:** Open the existing PDF in Acrobat (the PDF to which you want to append a web page).
- **Step 2:** Choose Tools > Organize Pages > Insert > Insert from Web Page.
- **Step 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.



You can also add an existing file to an opened PDF. Drag the file icon directly into the Page Thumbnails panel in the navigation pane.

Insert one PDF into another

- **Step 1:** Open the PDF that serves as the basis of the combined file.
- **Step 2:** Choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar.

- **Step 3:** In the secondary toolbar, choose Insert > From File. Alternatively, you can also click in between two pages to get the Insert options.
- **Step 4:** Select the PDF you want to insert and click Open.
- **Step 5:** In the Insert Pages dialog box, specify where to insert the document (before or after the first or last page, or a designated page). Click OK.
- **Step 6:** To leave the original PDF intact as a separate file, choose Save As, and type a new name for the merged PDF.

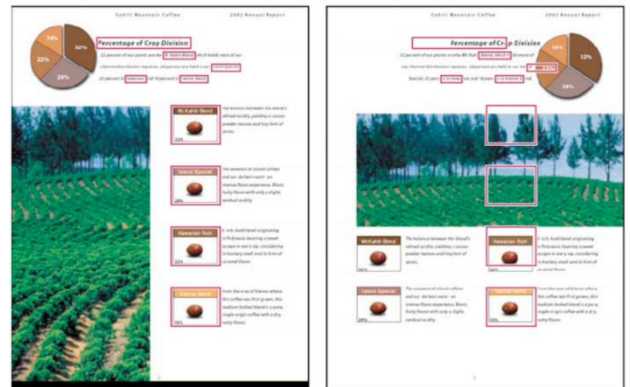
Insert a clipboard selection into a PDF

You can insert one or more pages of selected content copied from any application into an existing PDF.

- **Step 1:** Open the document containing the content that you want to add. Select the content, and then copy the selection (in most applications, by choosing Edit > Copy File To Clipboard).
- **Step 2:** Open the PDF that serves as the basis of the combined file.
- **Step 3:** Choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar.
- **Step 4:** In the secondary toolbar, choose Insert > From Clipboard. Alternatively, you can also click in between two pages to get the Insert options.
- **Step 5:** In the Insert Pages dialog box, specify where to insert the selection (before or after the first or last page, or a designated page). Click OK. To leave the original PDF intact as a separate file, choose Save As, and type a new name for the merged PDF.

Delete or replace pages


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.



Delete pages using the Delete command

Note: You cannot undo the Delete command.

- **Step 1:** Choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar and the page thumbnails are displayed in the Document area.

- **Step 2:** Specify the range of pages to delete. You can choose Even Pages, Odd Pages, Landscape Pages, Portrait Pages, All Pages, or enter the page number(s) you want to delete.
- **Step 3:** In the secondary toolbar, click Delete Pages  and click OK to confirm. 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 Enter Page Range drop-down list, and the page is deleted.

Delete pages using page thumbnails

- **Step 1:** Choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar and the page thumbnails are displayed in the Document area.
- **Step 2:** Select a page thumbnail you want to delete and click the icon to delete the page.
- **Step 3:** Alternatively, click the Page Thumbnails button in the left navigation pane to open the Page Thumbnail panel, select the page or group of pages you want to delete.
- **Step 4:** Click Delete Pages at the top of the Page Thumbnails panel.

Replace the contents of a page

- **Step 1:** Open the PDF that contains the pages you want to replace.
- **Step 2:** Choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar.
- **Step 3:** In the secondary toolbar, click Replace. The Select Files With New Pages dialog box appears.
- **Step 4:** Select the document containing the replacement pages, and click Open.
- **Step 5:** Under Original, enter the pages to be replaced in the original document.
- **Step 6:** 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.
- **Step 7:** Click OK.

Replace pages using a page thumbnail

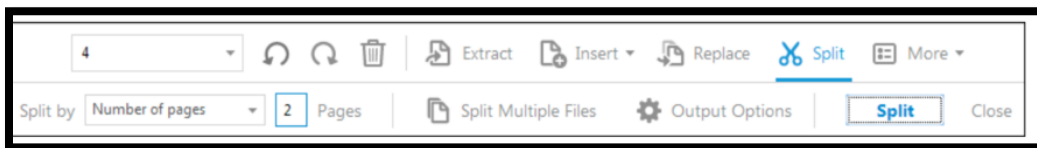
- **Step 1:** Open the PDF that contains the pages you want to replace, and then open the PDF that contains the replacement pages.
- **Step 2:** In the Page Thumbnails panel of the PDF that contains the replacement pages, select a page or group of pages:
 - Select the page number boxes of the page thumbnails that you want to use as replacement pages.
 - Shift-click to select multiple page thumbnails. Ctrl-click to add to the selection.
 - Drag a rectangle around a group of page thumbnails.
- **Step 3:** Ctrl+Alt+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.

Split

You can split one or more documents into multiple smaller documents. When splitting a document, you can specify the split by maximum number of pages, maximum file size, or top-level bookmarks.

- **Step 1:** Open the PDF and choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar.
- **Step 2:** In the secondary toolbar, click Split. A new toolbar appears below the secondary toolbar with the commands specific to the Split operation.



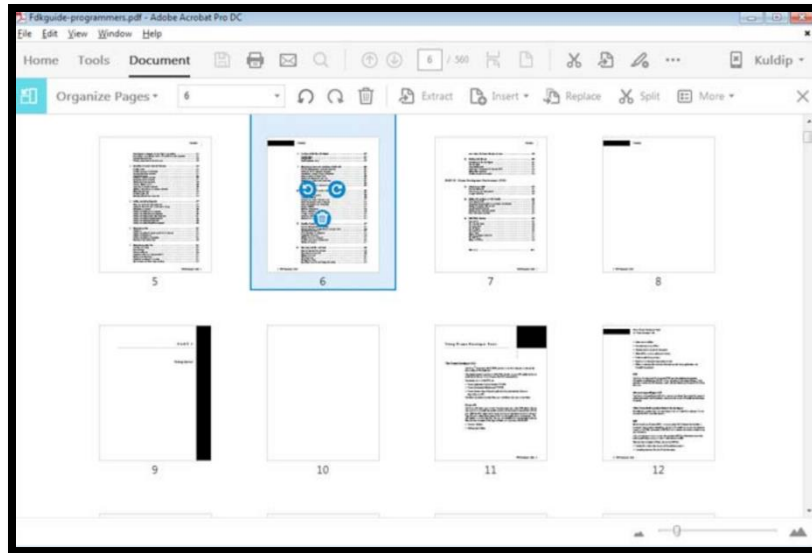
- **Step 3:** In the Split By drop-down list, select the criteria for dividing the document:
 - **Number Of Pages:** Specify the maximum number of pages for each document in the split.
 - **File Size:** Specify the maximum file size for each document in the split.
 - **Top-level Bookmarks:** If the document includes bookmarks, creates one document for every top-level bookmark.
- **Step 4:** To specify a target folder for the split files and filename preferences, click Output Options. Specify the options as needed, and then click OK.
- **Step 5:** (Optional) To apply the same split to multiple documents, click Split Multiple Files. In the Split Documents dialog box, click Add Files, and choose Add Files, Add Folders, or Add Open Files. Select the files or folder, and then click OK.

Move or copy pages

You can use page thumbnails in the Navigation pane or the Document area to copy or move pages within a document, and copy pages between documents.

Move or copy a page within a PDF, using page thumbnails

- **Step 1:** Open the PDF and choose Tools > Organize Pages. The Organize Pages toolset is displayed in the secondary toolbar and the page thumbnails are displayed in the Document area.



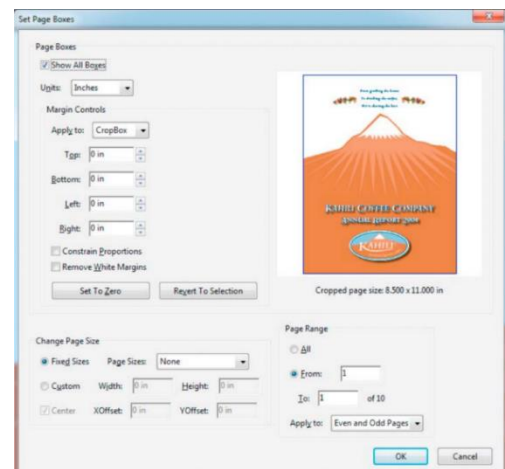
- **Step 2:** Select one or more page thumbnails.
- **Step 3:** Do one of the following:
 - **To move a page:** Drag the page number box of the corresponding page thumbnail or the page thumbnail itself to the new location. A bar appears to show the new position of the page thumbnail. The pages are renumbered.
 - **To copy a page:** Ctrl-drag the page thumbnail to a second location.

Note: You can also perform the above operations in the left navigation pane by clicking the Page Thumbnails button.

Set Page Boxes

Use the Set Page Boxes dialog box (formerly called Crop Pages) 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 Set Page Boxes 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.*



Open the Set Page Boxes dialog box

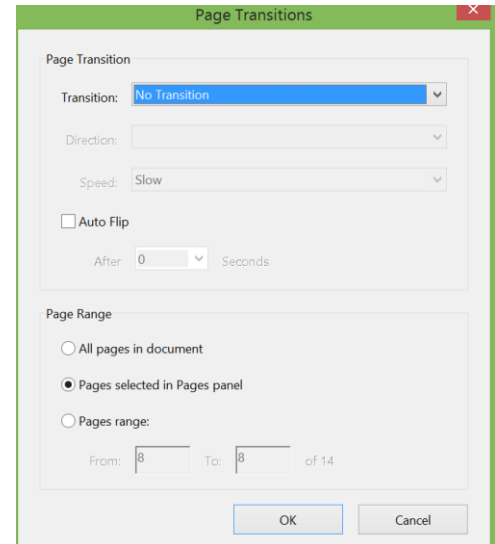
Step 1: Choose Tools > Organize Pages > More > Set Page Boxes.

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 Actions wizard.

- **Step 1:** Choose Tools > Organize Pages > More > Page Transitions.
- **Step 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.
- **Step 3:** Choose the direction in which the transition effect occurs. Available options depend on the transition.
- **Step 4:** Choose the speed of the transition effect.
- **Step 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.
- **Step 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.*



Chapter 20: Prepare Form

Easily turn a scanned paper form or a simple form made in Microsoft Word, Excel, or another application into an intelligent PDF form. Distribute forms to recipients and track the status of replies.

Create a form from an existing document

When you convert an existing document into a PDF form, Acrobat DC automatically adds interactive form fields to the form. You can then edit the form to add specialized form fields, such as a drop-down list, list box, or buttons.

The screenshot shows a PDF form for 'Kahili Mountain Coffee Club'. It includes a header bar (D) with instructions. The form contains several sections: 'Island Special', 'Mt. Kahili Blend', 'Hawaiian Rich', and 'Vienna Blend', each with a description and a price. There is a 'Join Kahili Mountain Coffee Club' section with a mug and a T-shirt image. A 'Subscribe to Kahili Mountain Coffee On-line News' section is also present. The form includes various interactive fields: a signature field (A), a drop-down list box (B) for state selection, text fields (C) for name, address, city, state, zip code, credit card number, and expiration date. There are checkboxes (E) for 'Specify Order Here' and 'YES! Sign me up!'. Radio buttons (F) are used for 'Yes, sign me up for the Coffee Club!' and 'No thanks, just ship my order!'. A list box (G) is used for 'Indicate T-Shirt Size:'. Buttons (H) are provided for 'Submit by Email', 'Reset Form', and 'Print Form'. The form also includes a 'Grand Total' field and a 'Make Checks Payable to:' field.

A Certificate-based signature field B Drop-down list box C Text fields D Automatic message bar E Check boxes F Radio buttons G List box H Buttons

- **Step 1:** Choose Tools > Prepare Form
- **Step 2:** Select one of the following options:
 - **Select a file:** Converts an existing electronic document (for example, Word, Excel, or PDF) to an interactive PDF form. Click Select a File to browse and locate the file.
 - **Scan a document:** Scans a paper form and converts it to an interactive PDF form.

- **Step 3:** If you want others to sign this form, select the This Document Requires Signature check box. *Note: The form field auto detection is ON, by default. To change this setting, click the Change link and choose the settings as appropriate.*
- **Step 4:** Click Start. Acrobat DC creates the form and opens it in the Form Editing mode. The right hand pane displays options for editing the form. The toolbar contains form field tools for adding additional fields.
- **Step 5:** Review the form fields Acrobat DC created. Add fields using the form field tools in the toolbar. Delete, resize, or arrange the fields as needed. You can add any of the following types of form fields:
 - **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.
 - **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.
 - **Digital signature field:** Lets the user electronically sign a PDF document with a digital signature.
 - **Drop-down list:** Let the user either choose an item from a pop-up menu or type a value. You can set a form field property that enables the user to enter a custom value.
 - **List boxes:** Display a list of options the user can select. You can set a form field property that enables the user to Shift-click to select multiple items on the list.
 - **Radio buttons:** Present a group of choices from which the user can select only one item. All radio buttons with the same name work together as a group.
 - **Text fields:** Let the user type text, such as name, address, or phone number.
- **Step 6:** To test your form, click the Preview button in the toolbar. Previewing a form allows you to view the form the same way the form recipients will and gives you a chance to verify the form. If you are previewing a form, you can click the Edit button to go back to the edit mode.
- **Step 7:** When your form is complete, click the cross button towards the right end of the toolbar to close form editing.

Create forms for eSign

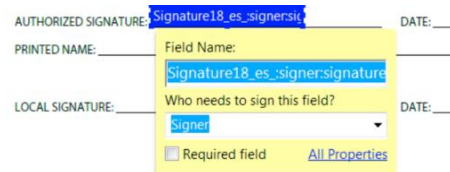
You can convert an existing form into an eSign form or easily drag-and-drop eSign fields onto a PDF. You can send the form out to be filled in and signed using the Adobe Document Cloud eSign service. Not all fields convert to eSign fields, such as List Box, Dropdown, or Button fields. You can add additional eSign fields from the toolbar.

- **Step 1:** Open the PDF you want to convert to an eSign form.
- **Step 2:** Choose Tools > Prepare Form
- **Step 3:** Click Start. Acrobat DC creates the form and opens it in the Form Editing mode. The right hand pane displays options for editing the form. The toolbar contains form field tools for adding additional fields.

- **Step 4:** In the right hand pane, click More and then choose Convert To eSign Form.
- **Step 5:** When alerted that Acrobat DC removes form fields that eSign doesn't support, click Next, and then in the subsequent alert, click OK.
- **Step 6:** To add a field to the form, select its icon in the toolbar. Position the pointer where you want to place the field, and click to insert it.



- **Step 7:** Name the field and designate who is to fill it in or sign it. To set its properties, such as the border color, fill, font, and typeface size, double-click the field.
- **Step 8:** To preview your changes, click Preview in the upper-right corner. Click Edit in the upper-right corner to switch back to the edit mode.
- **Step 9:** Save the form.



Enable Reader users to save form data

Ordinarily, users of Reader X and earlier can't save filled-in copies of forms that they complete. However, you can extend the rights of a PDF to allow these users to save form data. If you have Acrobat Pro DC, you can include additional capabilities for Reader users, such as adding text to non-interactive forms. *Note: Unlike earlier versions of Reader, Reader XI and Acrobat Reader DC include both the Add Text tool and the ability to save form data. Acrobat DC users can type in non-fillable forms, add comments, and digitally sign PDFs without extending special rights.*

- **Step 1:** Open a single PDF, or preview a component PDF in a PDF Portfolio.
- **Step 2:** If you are editing the form, click the cross icon next to the Preview button in the upper-right corner.
- **Step 3:** Choose File > Save As Other > Reader Extended PDF, and choose one of the following options:
 - **Enable Commenting & Measuring:** Allows users to add comments or access the Object Data, Measuring, and Geospatial tools.
 - **Enable More Tools** (includes form fill-in & save): Lets users save data they've entered in interactive or fillable forms.

Limitations on saving filled-in forms locally

Both Acrobat Standard DC and Acrobat Pro DC allow Adobe Reader 8 or later users to fill in and save PDF forms locally. The use of the Reader Extensions capability for local saving of PDF forms (called extended documents) is limited in two ways:

Number of deployed extended documents: An Acrobat Standard DC or Acrobat Pro DC customer can send an extended document to an unlimited number of recipients for them to fill in. For example, an

Acrobat customer can post an empty form template on a web page that allows users to fill in and save PDF forms locally. An unlimited number of people can access the template. However, the Acrobat customer can collect only 500 responses from the filled-in form. This limitation includes both hardcopy (paper form submission) and electronic representations of the filled-in form.

Number of recipients of the extended document: An Acrobat Standard DC or Acrobat Pro DC customer can send an extended document to no more than 500 unique recipients. For example, an Acrobat customer belongs to an organization with 500 people or less. The Acrobat customer can send an unlimited number of copies of the extended document to those 500 recipients and collect unlimited responses from the filled-in form.

Distribute (send) forms to recipients

Distribute PDF or web forms

After you create a form, you choose a method for sending it to recipients.

- **Step 1:** Click Distribute in the lower-right corner of the right hand pane.
- **Step 2:** A series of messages might appear, depending on the conditions, Acrobat DC detects in your form. Respond to the onscreen instructions as needed, and save the form.
- **Step 3:** Choose a distribution and collection method: Email Collect responses in your inbox. Distribute and collect responses on an internal server such as SharePoint or Network Folder. For more information see Specify a Server.
- **Step 4:** Click Continue and follow the onscreen instructions for distributing the form.
- **Step 5:** If you choose to collect responses in your email inbox, do one of the following:
 - Enter the email addresses separated with a semi-colon, or click the To button to select email addresses from your address book.
 - Edit the default message.
 - Select the option Collect Name & Email from Recipients To Provide Optimal Tracking. The system prompts recipients to provide their name and email address when they submit the form. This guarantees that in Tracker, you see exactly who has and hasn't replied, and when.
 - Deselect the option if you want to receive anonymous submissions, or you don't care about that level of tracking.
 - *Note: If you don't know the email addresses of your recipients, enter your own email address. The system sends you a link to the form, which you can email to recipients as desired.*

Distribute eSign forms

After you create an eSign form, you can use Adobe Document Cloud eSign service for sending it to recipients for filling in and signing.

- **Step 1:** Click Send For Signatures in the lower-right corner of the right hand pane.

- **Step 2:** Click Ready to Send. The document is uploaded to Adobe Document Cloud.
- **Step 3:** Type in the email addresses of people you want to sign your document. Add a message if desired.
- **Step 4:** Click Send. You receive an email from Adobe Document Cloud eSign services that your documents have been sent out for signature to the first user. The first user also receives an email to sign the document. When the user adds his or her signature in the Signature field, and then click the Click to sign button, the document is sent to the next user for signature and so on.

Everyone gets a copy of the signed document, and the file is stored securely in Adobe Document Cloud

PDF 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 on.

You can set various properties for an Acrobat DC form field, depending on the form field type. The properties for each type of form field are selected on a series of tabs. When you change a property, it is applied as soon as you select another property or press Enter.

All types of form fields have a General 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

Closes the form field Properties dialog box. If you are changing the properties of multiple fields, you can leave the Properties dialog box open. Click each field to change its properties.

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

You can access form field properties only when you are in editing mode. You can change the properties for multiple form fields at a time.

- **Step 1:** If you are not in form editing mode, choose **Tools > Prepare Form**.
- **Step 2:** Open the Properties dialog box using one of the following methods:
 - To edit a single form field, double-click it or right-click it and choose **Properties**.

- To edit multiple form fields, select the fields that you want to edit, right-click one of the selected fields, and choose **Properties**.
- **Step 3:** Change the properties on each of the available tabs, as needed.
 - The property is changed as soon as you select another property or press Enter.
- **Step 4:** Click **Close**.

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 option again.

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 except barcodes, 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. If you select Auto for a text field, as the user types, the font size changes to fit the text in the box.

- **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 Language 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 and text direction for text fields, drop-down list boxes, and list boxes.*

Position tab for form field properties

The Position tab lets you position or size the currently selected field or fields. You can move fields to the location you specify on the page. Use the Height and Width options to change only the size of fields. To move fields without resizing them, choose Do Not Change Height And Width When Changing The Position.

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 Flat 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 **Last updated 4/7/2015** 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.

Drop-down and list box

For either dropdown 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 dropdown box or list box field. To change the default item, highlight another item from the list.*

- **Up and Down buttons:** Change the order in which the items are listed in the drop-down list. These buttons are not available if Sort Items is selected.
- **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:** (Dropdown only) Enables users to enter a value other than the ones in the list.
- **Check Spelling:** (Dropdown only) Checks the spelling of user-entered text. This option is applicable 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

Create a group of radio buttons if you want the user to select only one choice among a set of choices. All the radio buttons in a group have the same Name, but each button has a different Button Value.

- **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.
- **Radio Button Choice:** Identifies the radio button and differentiates it from other radio buttons that have 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 Content 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 selected content 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.

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/Multimedia View, Go To A Page View; Import Form Data, Multimedia Operation (Acrobat 9 and later), 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 window for the selected action.
- **Actions:** Displays the list of triggers and actions that you've defined.
- **Up and down buttons:** 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 fields and dropdown 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.
 - **Note:** Field names are case-sensitive.

- **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.

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.

Format tab for form field properties

The Format tab appears in the Properties dialog box for only text form fields or dropdown form fields. The options that are available depend on your selection in the **Select Format Category** pop-up menu.

The **Example of Current Format** field displays a live preview of the settings.

- **None:** No additional options are available. The input in a text or dropdown 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.
 - **Symbol Location:** Sets the location of the currency symbol in relation to the number. This field is enabled if a currency symbol is selected.
 - **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 field 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.

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.



Chapter 21: Protect PDF



There are a few different options for protecting a document in Adobe Acrobat DC. We will cover each of these options in this section.

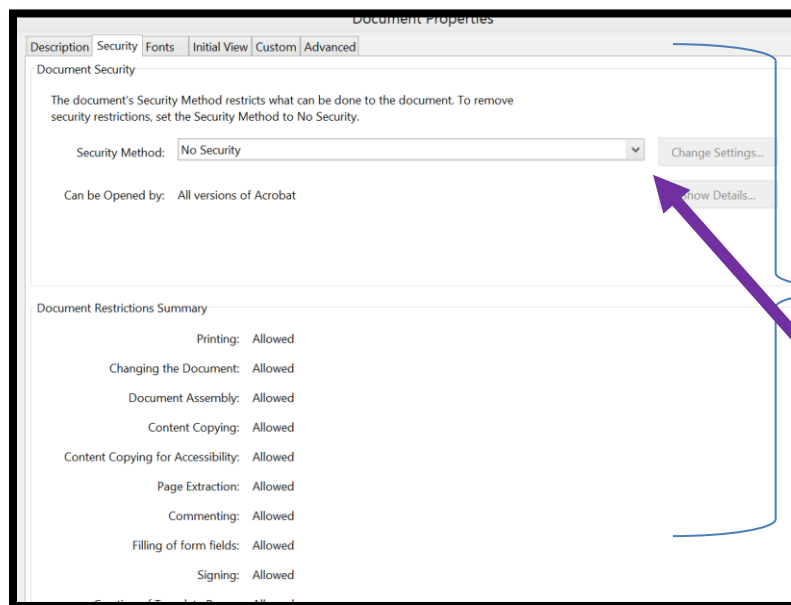
Protect

To add protection to a document:

1. With document open, select PROTECT, a new toolbar will appear at the top of the page.



2. To cover all bases on what type of protection you would like your document to have, the easiest selection to choose is MORE OPTIONS, SECURITY PROPERTIES. This will launch a new box.

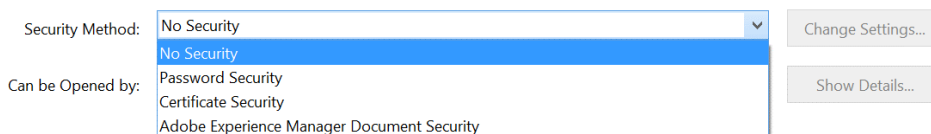


This box shows the current document security settings.

Select the drop down next to SECURITY METHOD to modify.

3. To change current security settings, select the drop down next to SECURITY METHOD.

The document's Security Method restricts what can be done to the document. To remove security restrictions, set the Security Method to No Security.



Securing PDFs with passwords

Password security and restricting printing, editing, and copying

You can limit access to a PDF by setting passwords and by restricting certain features, such as printing and editing. However, you cannot restrict saving copies of a PDF. The copies have the same restrictions as the original PDF. Two types of passwords are available:

Document open password: A Document Open password (also known as a user password) requires a user to type a password to open the PDF.

Permissions password: A permissions password (also known as a master password) requires a password to change permission settings. Using a permissions password, you can restrict printing, editing, and copying content in the PDF. Recipients don't need a password to open the document in Reader or Acrobat. They do need a password to change the restrictions you've set.

If the PDF is secured with both types of passwords, it can be opened with either password. However, only the permissions password allows the user to change the restricted features. Because of the added security, setting both types of passwords is often beneficial.

Note: You cannot add passwords to a signed or certified document.

Add a password to a PDF

You can add password security to a PDF. To open the PDF, the user must enter a password.

- **Step 1:** Open the PDF and choose Tools > Protect > Encrypt > Encrypt with Password.
- **Step 2:** If you receive a prompt, click Yes to change the security.
- **Step 3:** Select Require A Password To Open The Document, then type the password in the corresponding field. For each keystroke, the password strength meter evaluates your password and indicates the password strength using color patterns.



- **Step 4:** Select an Acrobat version from the Compatibility drop-down menu. Choose a version equal to or lower than the recipients' version of Acrobat or Reader.
 - The Compatibility option you choose determines the type of encryption used. It is important to choose a version compatible with the recipient's version of Acrobat or Reader. For example, Acrobat 7 cannot open a PDF encrypted for Acrobat X and later.

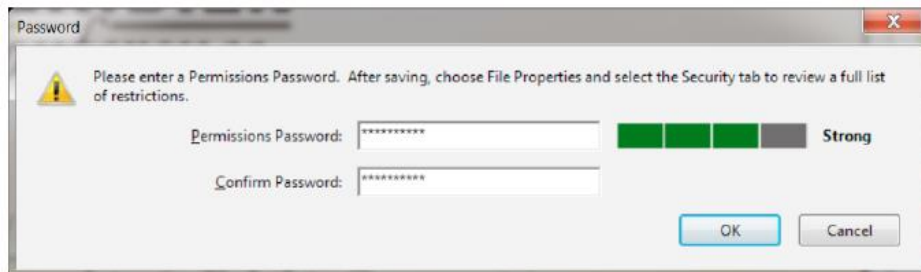


- Acrobat 6.0 And Later (PDF 1.5) encrypts the document using 128-bit RC4.
- Acrobat 7.0 And Later (PDF 1.6) encrypts the document using the AES encryption algorithm with a 128-bit key size.
- Acrobat X And Later (PDF 1.7) encrypts the document using 256-bit AES. To apply 256-bit AES encryption to documents created in Acrobat 8 and 9, select Acrobat X And Later.
- **Step 5:** Select an encryption option:
 - **Encrypt All Document Contents:** Encrypts the document and the document metadata. If this option is selected, search engines cannot access the document metadata.
 - **Encrypt All Document Contents Except Metadata:** Encrypts the contents of a document but still allows search engines access to the document metadata.
 - **Encrypt Only File Attachments:** Requires a password to open file attachments. Users can open the document without a password. Use this option to create security envelopes.
- **Step 6:** Click OK. At the prompt to confirm the password, retype the appropriate password in the box and click OK.

Restrict editing of a PDF

You can prevent users from changing PDFs. The Restrict Editing option prohibits users from editing text, moving objects, or adding form fields. Users can still fill in form fields, sign, or add comments.

- **Step 1:** Open the PDF and choose Tools > Protect > Restrict Editing.
- **Step 2:** If you receive a prompt, click Yes to change the security.
- **Step 3:** Type the password in the corresponding field. For each keystroke, the password strength meter evaluates your password and indicates the password strength using color patterns.



- **Step 4:** Click OK, and then save the PDF to apply the restrictions.

Restrict printing, editing, and copying

You can prevent users from printing, editing, or copying content in a PDF. You can set the restrictions you want to apply to the PDF. You can change these restrictions only if you know the permissions password.

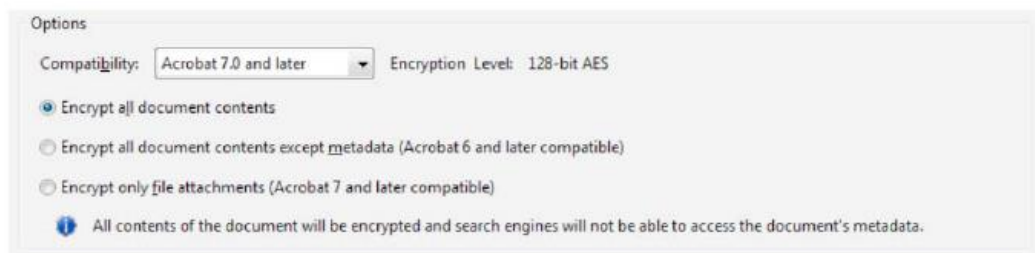
Illustrator, Photoshop, or InDesign do not have view-only modes. To open a restricted PDF in these applications, the user must enter the permissions password.

Note: If you forget a password, you cannot recover it from the PDF. Consider keeping a backup copy of the PDF that isn't password-protected.

- **Step 1:** Open the PDF and choose Tools > Protect > Encrypt > Encrypt with Password.
- **Step 2:** If you receive a prompt, click Yes to change the security.
- **Step 3:** Select Restrict Editing And Printing Of The Document.
 - All Adobe products enforce the restrictions set by the permissions password. However, if third-party products do not support these settings, document recipients are able to bypass some or all of the restrictions you set.
- **Step 4:** Type the password in the corresponding field. For each keystroke, the password strength meter evaluates your password and indicates the password strength using color patterns.

- **Step 5:** Select what the user can print from the Printing Allowed menu:
 - **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.
- **Step 6:** Select what the user can change from the Changes Allowed menu:
 - **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.
- **Any Except Extracting Pages:** Lets users edit the document, create and fill in form fields, and add comments and digital signatures.
- **Step 7:** Choose any of the following options:
 - **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.
- **Step 8:** Select an Acrobat version from the Compatibility menu. Choose a version equal to or lower than the recipients' version of Acrobat or Reader. The Compatibility option you choose determines the type of encryption used. It is important to choose a version compatible with the recipient's version of Acrobat or Reader. For example, Acrobat 7 cannot open a PDF encrypted for Acrobat X and later.



- **Step 9:** Select what you want to encrypt:
 - **Encrypt All Document Contents:** Encrypts the document and the document metadata. If this option is selected, search engines cannot access the document metadata.
 - **Encrypt All Document Contents Except Metadata:** Encrypts the contents of a document but still allows search engines access to the document metadata.
 - **Note:** *The iFilter and the Find or Advance Search commands of Acrobat do not look into the PDF's metadata even when you select the **Encrypt All Document Contents Except Metadata** option. You can use a search tool that takes advantage of XMP metadata.*
 - **Encrypt Only File Attachments:** Requires a password to open file attachments. Users can open the document without a password. Use this option to create security envelopes.

- **Step 10:** Click OK. At the prompt to confirm the password, retype the appropriate password in the box and click OK.

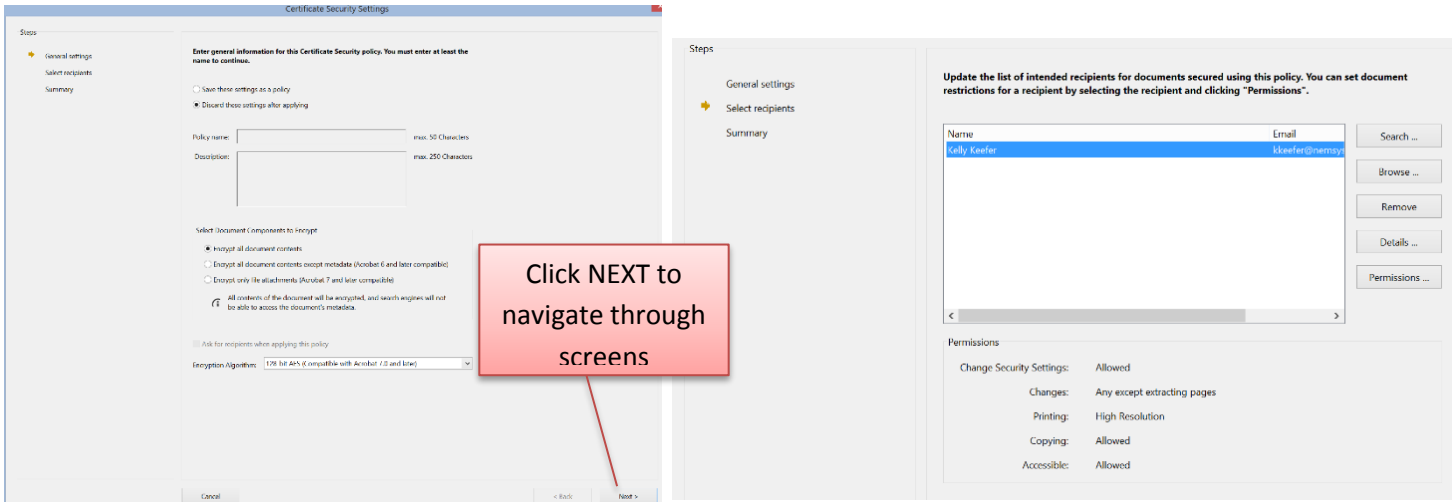
Remove password security

You can remove security from an open PDF if you have the permissions to do so. If the PDF is secured with a server-based security policy, only the policy author or a server administrator can change it.

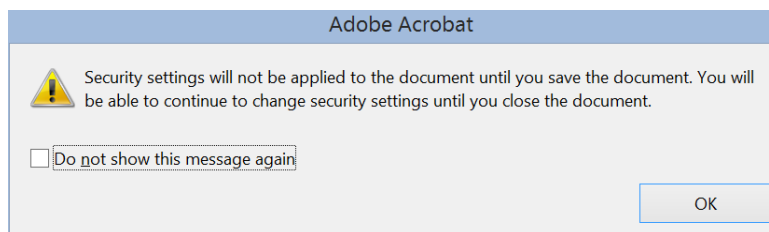
1. Open the PDF, then select Tools > Protect > Encrypt > Remove Security
2. Your options vary depending on the type of password security attached to the document:
 - If the document had only a Document Open password, click **OK** to remove it from the document.
 - If the document had a Permissions password, type it in the **Enter Password** box, and then click **OK**. Click **OK** again to confirm the action.

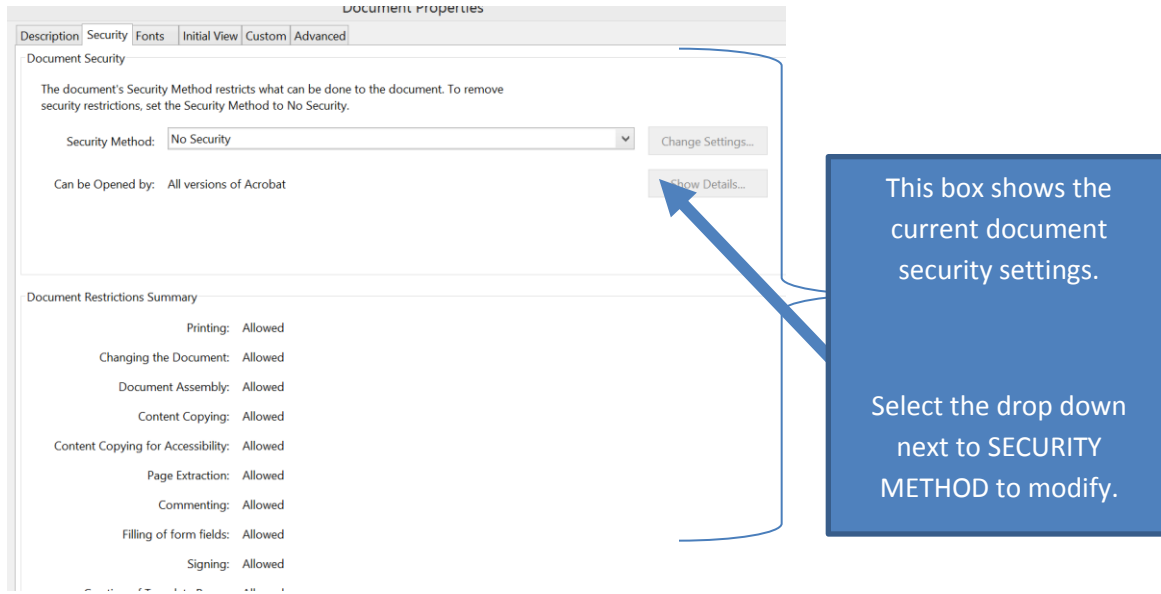
Certificate Security

Certificate security is best used if you would like to assure your recipients that the PDF is really from you. Encryption ensures that only the intended recipient can view the contents. When you secure a PDF using a certificate, you specify the recipients and define the file access level for each recipient or group. For example, you can allow one group to sign and fill forms and another to edit text or remove pages. You can choose certificates from your list of trusted identities, files on disk, LDAP server, or the Windows certificate store (Windows only). Always include your certificate in the recipient list so that you can open the document later.



- The security settings do not take place until the document is saved.





1. To change current security settings, select the drop down next to SECURITY METHOD and select NO SECURITY.

To turn security off

2. With document open, select PROTECT, a new toolbar will appear at the top of the page.



3. To cover all bases on what type of protection you would like your document to have, the easiest selection to choose is MORE OPTIONS, SECURITY PROPERTIES. This will launch a new box.

Chapter 22: Searching PDFs

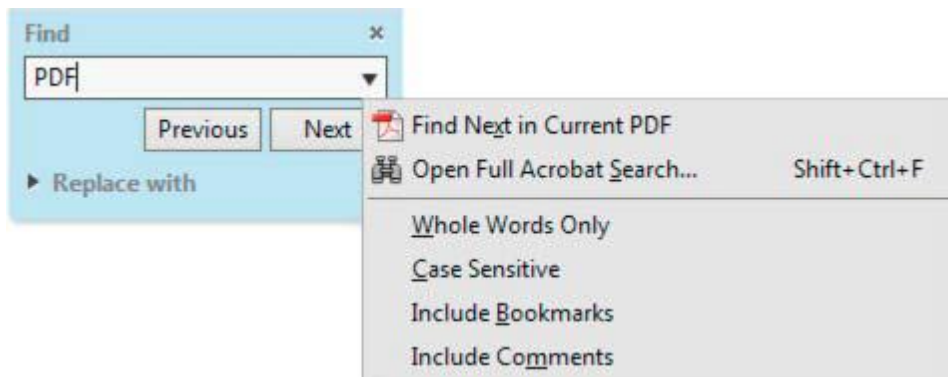
You have lots of control and lots of possibilities for running effective and efficient searches in Adobe Acrobat DC. A search can be broad or narrow, including many different kinds of data and covering multiple Adobe PDFs.

If you work with large numbers of related PDFs, you can define them as a catalog in Acrobat Pro DC, which generates a PDF index for the PDFs. Searching the PDF index—instead of the PDFs themselves—dramatically speeds up searches. See Creating PDF indexes.

Search and replace 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 selectively replace text.

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. Only the Find toolbar includes a Replace With option.



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.

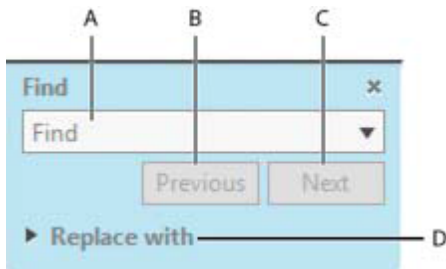
Note: PDFs can have multiple layers. If the search results include an occurrence on a hidden layer, selecting that occurrence displays an alert that asks if you want to make that layer visible.

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 and to replace text. 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

❖ Open it by choosing Edit > Find (Ctrl/Command+F).



A Find field **B** Find Previous **C** Find Next **D** Replace With expands to provide text field


Open the Search window

❖ Do one of the following:

- Choose Edit > Advanced Search (Shift+Ctrl/Command+F)
- 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 and replace text in PDFs

Find and replace text in a PDF

The Find toolbar searches the currently open PDF. You can selectively replace the search term with alternative text. You replace text one instance at a time. You cannot make a global change throughout a PDF or across multiple PDFs.

Choose Edit > Find (Ctrl/Command+F).

- **Step 1:** Type the text you want to search for in the text box on the Find toolbar.

- **Step 2:** To replace text, click Replace With to expand the toolbar, then type the replacement text in the Replace With text box.
- **Step 3:** (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.
- **Step 4:** Click Next.
 - Acrobat jumps to the first instance of the search term, which appears highlighted.
- **Step 5:** Click Replace to change the highlighted text or click Next to go to the next instance of the search term. Alternatively use the Previous to go back to the previous instance 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 PDFs in a specific location or all files in an open PDF Portfolio. The Replace With option is not available in the Search window.

Note: *If documents are encrypted (have security applied to them), you cannot search them as part of a multiple-document search. 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.*

- **Step 1:** Open Acrobat DC on your desktop (not in a web browser).
- **Step 2:** Do one of the following.
 - In the Find toolbar, type the search text, and then choose Open Full Acrobat Search from the pop-up menu.
 - In the Search window, type the search text.
- **Step 3:** In the Search window, select All PDF Documents In. From the pop-up menu directly below this option, choose Browse For Location.
- **Step 4:** Select the location, either on your computer or on a network, and click OK.
- **Step 5:** To specify additional search criteria, click Show Advanced Options, and specify the options.
- **Step 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, run a new search.

Review and save PDF search results

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 (single PDFs only)








- **Step 1:** If necessary, expand the search results. Then select an instance in the results to view it in the PDF.
- **Step 2:** To view other instances, click another instance in the results.

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 document active in the document window. Expand the list to show the individual search results within that document.
- **(General) Search Result icon**  In PDFs, 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.
- **Non-PDF Search Result or Metadata icon**  [] In non-PDF files, opens the file; or if opening of that file type is restricted, opens a message dialog box.
- **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 file that is attached to the searched parent PDF and shows the highlighted instances of the search terms.

Save search results

You can save the search results as a PDF or CSV file. For a video, see [Saving Search Results in Acrobat](#).

❖ Click  and choose Save results to PDF or Save results to CSV.

Advanced Search Options

By default, the Search window displays basic search options. Click Show More Options near the bottom of the window to display additional options. To restore the basic options, click Show Less Options near the bottom of the window.

- **Look In:** Restricts the search to the current PDF, all of a currently open PDF Portfolio (if applicable), an index, or a location on your computer. If you choose to search an index, a location, or a PDF Portfolio, additional options appear under Use These Additional Criteria.
- **What word or phrase would you like to search for:** Enter the text or phrase to search for.
- **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:
 - **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 files 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. This setting does not apply to non-PDF files inside PDF Portfolios.
- **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.

Chapter 23: Send for Comments

Start a shared review

The shared PDF that you send includes the Annotation and Drawing Markups panels, and instructions in the document message bar.

- **Step 1:** Choose Tools > Send For Comments.
The Send for Comments toolset is displayed in the secondary toolbar.
- **Step 2:** In the secondary toolbar, click Send For Shared Commenting. *Note: If prompted, select a PDF file that you want to send for shared review.*
- **Step 3:** Select the way you want to collect comments from your reviewer and click Next.
- **Step 4:** Select how you would like to host the shared review file and specify the location.
- **Step 5:** Choose a delivery and collection method. You can use your own internal server. Then follow the onscreen instructions.
- **Step 6:** On the email screen, specify the following settings as needed:
 - **Delivery Method:** Click to specify a different delivery and collection method from the one that is currently selected.
 - **To, Cc:** Enter the email addresses of your reviewers. Insert a semicolon or a return after each address. Click the To or Cc button to select email addresses from your email application address book.
 - **Subject, Message:** Preview and edit the email subject and message as needed. Acrobat saves any changes you make and displays them the next time you send a document for review. To use the default email message, click Reset Default Message.
 - **Review Deadline:** Click to specify a different date or no deadline. After the review deadline expires, reviewers cannot publish comments. *Note: If the review deadline expires while a reviewer has the document open in Acrobat, then the reviewer can publish comments before closing the document.*
- **Step 7:** Click Send. Acrobat creates a copy of the shared review file, named [original filename]_review.pdf, in the same folder as the original file you specified for the review.



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.) After initiating a shared review, you can also start an email-based review with the same PDF.



Before you start an email-based review, make sure that your email application or webmail account is configured to work with Acrobat.

- **Step 1:** Choose Tool > Send For Comments. The Send for Comments toolset is displayed in the secondary toolbar.
- **Step 2:** Click Send For Comments By Email.
- **Step 3:** If prompted, enter information in the Identity Setup dialog box.
- **Step 4:** 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.
- **Step 5:** Specify reviewers by typing their email addresses. Insert a semicolon or a return between each address. Click Address Book to select email addresses from your email application or webmail address book.
- **Step 6:** Preview and edit the email invitation as needed, and then click Send Invitation.
- **Step 7:** Select an email client to send the invite and click Continue. A copy of the PDF is sent to the reviewers as an attachment. When this PDF attachment is opened, it presents commenting tools and instructions.

Merge comments

After you receive comments from reviewers, you can merge the comments into the master PDF.

- **Step 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: It's possible to forward comments to the initiator if you didn't initiate the review. First merge these comments into your copy of the PDF. Then send the comments (see Send comments in email). If you've sent your comments already, the initiator receives only new comments. Merged comments retain the original author name.
- **Step 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 On to Master PDF.
 - **Cancel:** Closes the reviewer's PDF that contains comments.

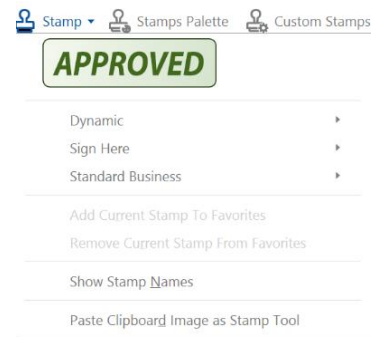
Chapter 24: Stamps

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 computer 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 secondary toolbar of the Comment tool.



Apply a stamp

- **Step 1:** Select a stamp by doing one of the following:
 - Click the Stamp tool. The most recently used stamp is selected.
 - In the Stamps Palette, choose a category from the menu, and then select a stamp.
- **Step 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.
- **Step 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 the stamp and choose Delete.
- To change the stamp's opacity or the color of its pop-up note, right-click the stamp, and choose Properties. In the Appearance tab, set the opacity or color.

Move a stamp to the favorites list

- **Step 1:** Using the Select tool or the Hand tool, select a stamp markup on the page.
- **Step 2:** In the secondary toolbar of the Comment tool, click the Stamp tool and choose 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. In Acrobat Reader DC, create Custom stamp allows only PDF format. *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.*

- **Step 1:** Choose Tools > Comment > Stamps > Show Stamps Palette.
- **Step 2:** Click Import, and select the file.
- **Step 3:** If the file has more than one page, scroll to the page you want, and then click OK.
- **Step 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

- **Step 1:** Choose Tools > Comment > Stamps > Show Stamps Palette.
- **Step 2:** Choose the stamp category, right-click the stamp, and choose Edit.
- **Step 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.

- **Step 1:** Choose Tools > Comment > Stamps > Show Stamps Palette.
- **Step 2:** Choose the stamp category from the menu, right-click the custom stamp, and choose Delete.

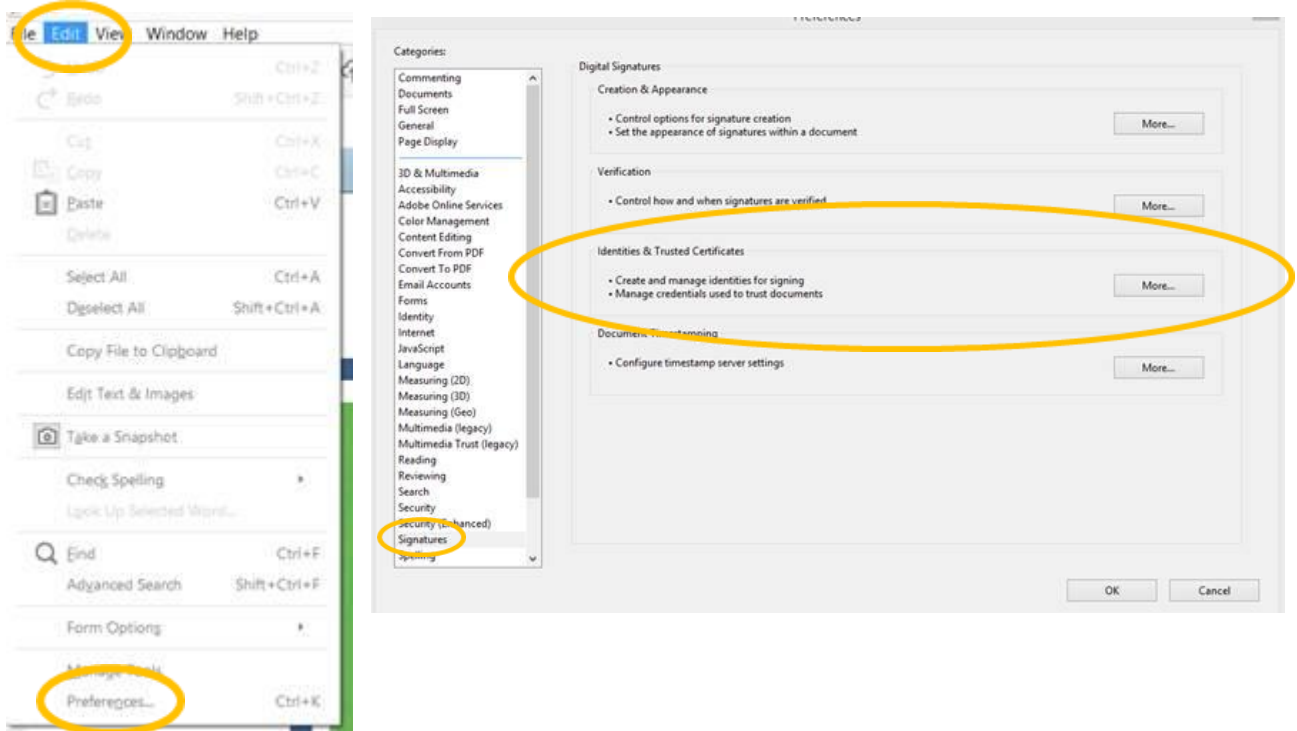
Delete a custom stamp category

- **Step 1:** Choose Tools > Comment > Stamps > Custom Stamps > Manage Stamps
- **Step 2:** Select the category you want to delete, and then click Delete. *Note: Deleting all stamps in a custom stamp category deletes the custom stamp category.*

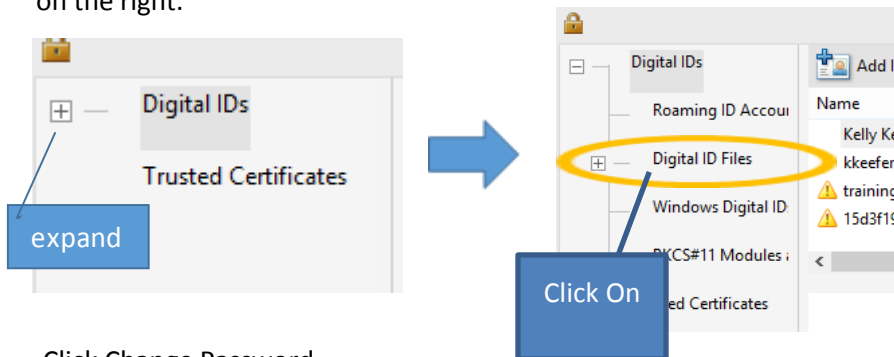
Chapter 25: Preferences

Changing Signature Password

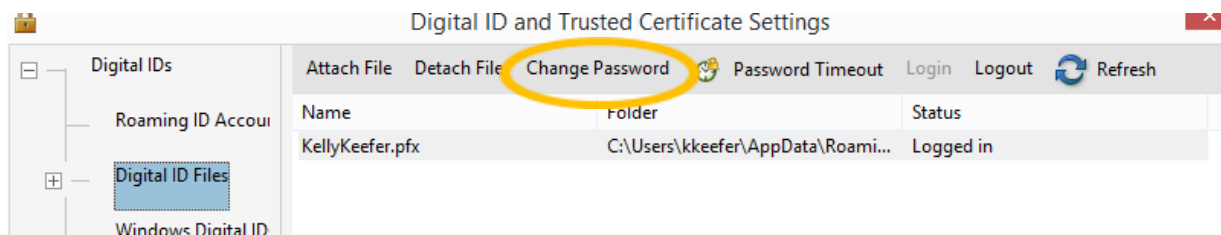
1. Choose Edit, then Preferences
2. Choose Signatures then in Identities & Trusted Certificates, click More.



3. Expand Digital IDs on the left, select Digital ID Files, and then select a digital ID on the right.



4. Click Change Password.



5. Type the old password and a new password.
6. For each keystroke, the password strength meter evaluates your password and indicates the password strength using color patterns.
7. Confirm the new password, and then click OK.
8. Click X in the upper right hand corner of the box.
9. Click OK to close out.



Commenting preferences

Commenting preferences affect both the appearance of and the way you view annotations and markups in PDFs.

Note: A reviewer can place comments anywhere within the document frame. As a result, sometimes you need to scroll or zoom out to see comments that are located off the page.

In the Preferences dialog box under edit, select Commenting.

- **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 to 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 when you place the pointer over a comment that includes a pop-up note. The tool tip contains the author name, comment status, and two lines of the text. 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 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 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.

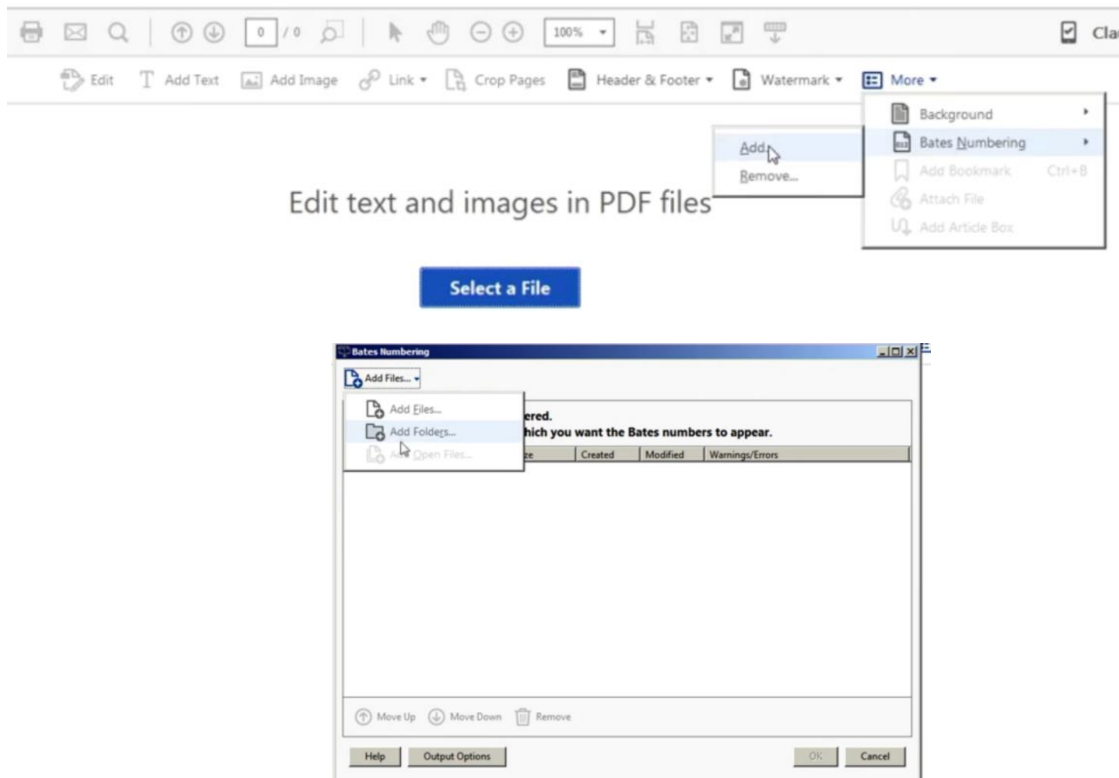
- **Automatically Open Pop-ups On Mouse Rollover:** When you place the pointer over a comment of any type, including drawing markups and stamps, the pop-up note opens.
- **Always Use Log-in Name For Author Name:** Determines which name appears in the pop-up note you create. If this option is selected, 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.

Chapter 26: Bates Stamping

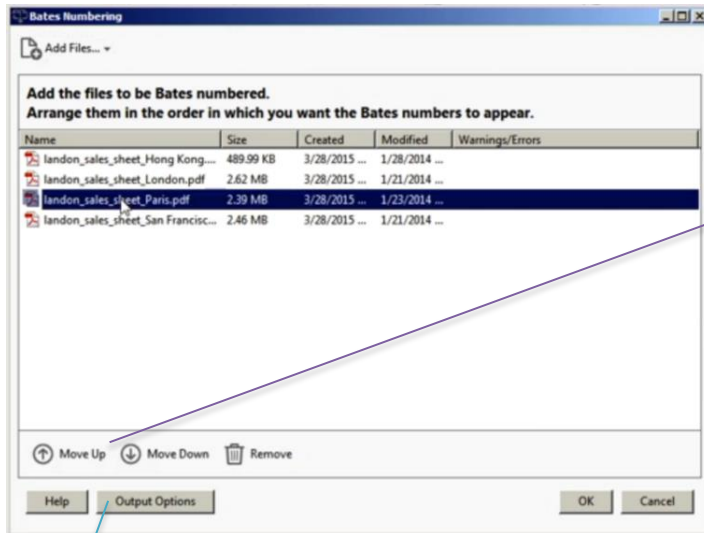
Bates Stamping

Bates numbering provides identification as well as ensuring that the consecutive numbering will result in correct reading of the content in the correct order. Bates Stamping is only available in Adobe Acrobat Pro.

- **Step 1:** Bates Stamping can be accessed in different ways including:
 1. STAMPS → BATES NUMBERING → Add
 2. EDIT PDF → MORE → BATES NUMBERING → Add
 3. ENHANCE SCANS → Bates → BATES NUMBERING → AddGenie



- **Step 2:** Add the files to be included.

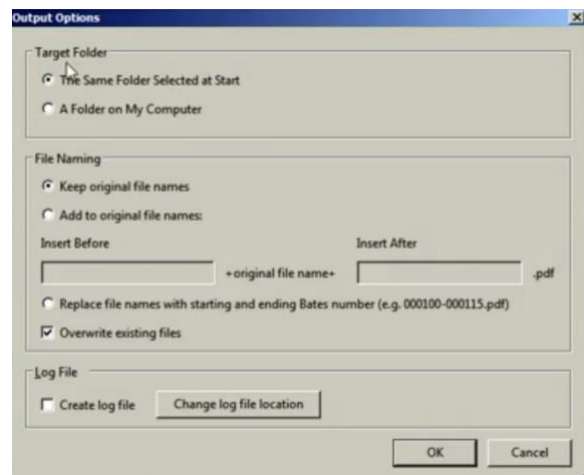


Can adjust files up or down
to what order you would
like the numbers to appear

Click OK when done

Select Output Options for where
to save the file and what to
name it.

- **Step 3:** Next launches the dialogue box for formatting the look and content of the bates numbering.



Add Header and Footer

Saved Settings: [None specified] [Delete](#) [Save Settings...](#)

Font
Name: Arial Size: 8 [U](#) [B](#)

[Appearance Options...](#)

Margin (Inches)
Top: 0.5 Bottom: 0.5
Left: 1 Right: 1

Left Header Text Center Header Text Right Header Text

Left Footer Text Center Footer Text Right Footer Text

[Insert Bates Number...](#) [Insert Date](#) [Page Number and Date Format...](#)

Preview
Preview Page 1 of 1 [Page Range Options...](#)

Help OK Cancel

Appearance Options

☐ Shrink document to avoid overwriting the document's text and graphics

☐ Keep position and size of header/footer text constant when printing on different page sizes

OK Cancel

Save Settings: [None specified] Delete Save Settings...

Font: Name: Arial Size: 8 U ■

Appearance Options...

Margin (Inches): Top: 0.5 Bottom: 0.5 Left: 1 Right: 1

Left Header Text Center Header Text Right Header Text

Left Footer Text Center Footer Text Right Footer Text

Insert Bates Number... Insert Date Page Number and Date Format...

Page Range Options...

Help OK Cancel

Place cursor in location
you would like bates
number to appear

Page Number and Date Format

Date Format: dd/mm/yyyy

Page Number Format: Bates Number

Start Page Number: 1

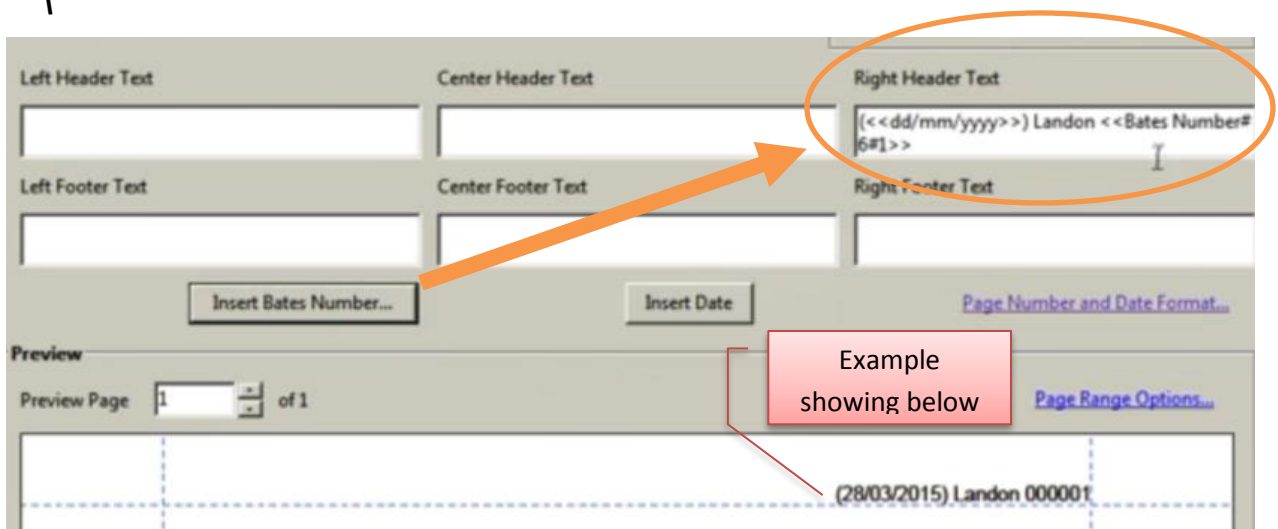
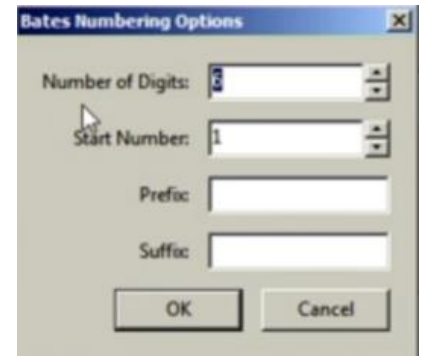
OK Cancel

In the example below, the bates number is entered as

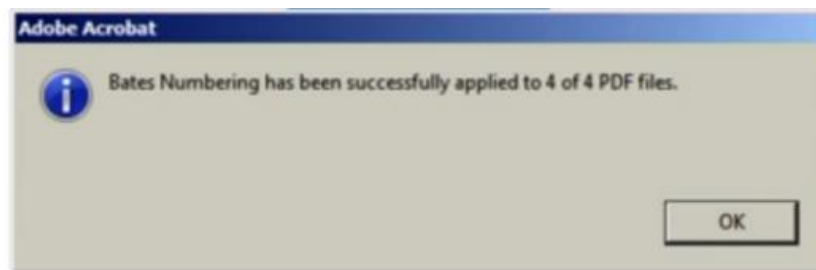
DD/MM/YYYY Landon BATES#

You can see this entered in the Right Header Text.

- Date: The date here has parentheses around it, those are hard entered in the field with the INSERT DATE clicked to input this information.
- Landon: Hard name typed in
- Bates Number: Clicked INSERT BATES NUMBER to input into field.



Once OK is selected, a box is launched stating how many files have been processed.



This does not open any of the files. To see the files go to:

File → Open → Navigate to folder → Click OK to open

Add more documents to a Bates numbering series

Before you begin, be sure that you know the last applied Bates number in the series.

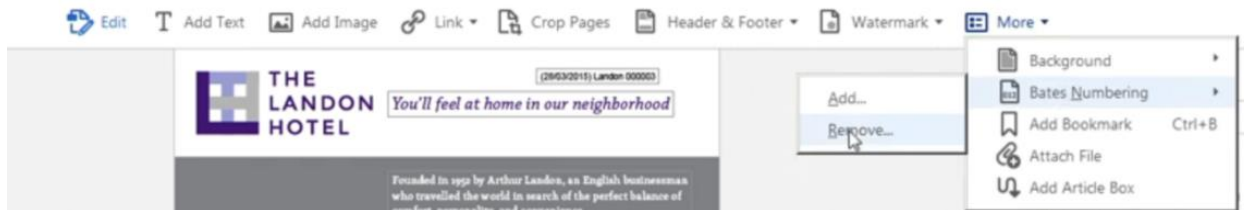
- **Step 1:** Follow the procedure described in the previous topic to start the Bates numbering process, selecting the files to add to the series.
- **Step 2:** After you click Insert Bates Number, enter the next number in the series in Start Number. Enter the Suffix and Prefix text that matches the rest of the series.
- **Step 3:** Finish changing the settings, and then click OK.

Search for Bates-numbered PDFs

- **Step 1:** Choose Edit > Advanced Search
- **Step 2:** In the search word or phrase text field, enter all or part of the Bates number.
 - For example, to find a specific document when you know its Bates number, type in the complete number as the search text. To find any documents in a Bates number series, type in a distinctive portion of the Bates series, such as the prefix or suffix.
- **Step 3:** Under Where Would You Like To Search, select All PDF Documents In.
- **Step 4:** Click Browse For Location and specify the location.
- **Step 5:** Click Search.
 - Note: To search for Bates-numbered PDFs in a PDF Portfolio, open the PDF Portfolio and enter all or part of the Bates number in the Search box on the PDF Portfolio toolbar.

Remove bates stamping

EDIT PDF → MORE → Bates Numbering → Remove



If you have any additional questions make sure to check out our other trainings and guides at the Nemsys Training Website or contact us at 419.243.3603