

2004 IAAP International Convention and Education Forum

Session: Creating and Using PDF Documents

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Creating and Using PDF Documents

Portable Document Format documents (PDFs) are one of the fastest growing document types today. PDFs are showing up everywhere from Web sites to e-mails. If you are searching for a way to make your documents appear as you designed them, this session is for you. We'll show you how to create your own PDFs using a couple of different PDF software tools, including Adobe Acrobat products. And we'll show you how to create forms that can be completed online, merge documents into a single PDF file and add reviewing notes and comments.

In this workshop, participants will learn to:

- n Identify the top portable document format (PDF) software products on the market
- n Use Adobe Acrobat to:
 - Create PDF documents
 - Add reviewing notes and comments
 - Merge documents into a single PDF
 - Create online forms

Why PDF?

- n Exchange nearly any type of document
- n Password-protect and digitally sign a document
- n Set options that prevent it from being copied, edited, or printed
- n Insert hyperlinks and bookmarks for simpler navigation through large documents
- n Nearly everyone has a program for viewing PDF files
 - Adobe Systems has given out over 500 million copies of its free PDF reader, Adobe Reader

PDF Maker Software

- n Adobe Acrobat Standard (\$299)
- n Adobe Acrobat Professional (\$449)
- n Adobe opened the source code so many products are now available
- n *PC Magazine's* Editor's Choice:
 - FinePrint pdfFactory PRO 1.57 (\$99 list)
 - Jaws PDF Creator 3.0 (\$79 list)

Creating a PDF Document

- n It's as simple as printing!
- n PDF makers install a printer driver on your computer
- n To create a PDF, choose the PDF maker as the printer and print the document
- n You are prompted to save the document to a file location

Add Reviewing Notes and Comments

1. Click the Note Tool.

2. Drag a box where you want to place the note.
3. Enter the note.
4. Click the Close button on the note.
5. Click the Hand tool to close or click in the document again to add another note.
6. Click the Comments tab to review the comments.

Combine Documents

1. Open the first document.
2. Click Document Insert Pages.
3. Select the document you want.
4. Choose if you want the document Before or After the First, Last or a Specific Page.
5. Click OK to insert the document.
6. Choose Document Number Pages to add page number to all pages in the document.

Create Online Forms

1. Layout a form in Word using tables.
2. Print the form as a PDF.
3. Open the pdf in Acrobat.
4. Click the Form tool.
5. Drag a box where you want the form field to appear.
6. Enter the properties of the field.
7. Press Enter to create the field.
8. Press the Hand tool to switch out of Form view.

Form Tips

- n Turn on gridlines and snap before creating fields (View Grid and View Snap To Grid)
- n To create rows of fields as in an expense report:
 1. Create the first row.
 2. Hold Shift and drag a box around the row.
 3. Hold Ctrl and drag the selection box to the size you want and then click. The table fills with cells.
- n Set tab order (Tools Forms Fields Tab Order) by clicking the cells in order

General Acrobat Tips

- n Get a good head start before attempting a cartwheel
- n Stick your tumbling runs to avoid deductions
- n Mount and dismount are not the same – know the difference!
(Just wanted to see if you were paying attention!)

More Useful Acrobat Tips

- n Rotate pages to make them easy to read (Document Rotate Pages or View Rotate)
- n Set Document Open Options to control how a document opens (File Document Properties Open Options)
- n Set Document Security options to prevent readers from printing, copying or changing the document (File Document Security Acrobat Standard Security)