

K2's Taking Another Look At PDFs

We're all familiar with PDF documents. However, it's safe to say that most professionals use only a tiny fraction of their features. This circumstance is unfortunate, considering all you can do with PDF documents. Therefore, isn't it time to take another look at PDF documents and all you can do with them?

Participate in this session to learn more about PDFs and how and why they should be a cornerstone technology in most organizations. Collaboration options, long-term storage and archival, and fillable forms are just a few features you will learn about in this session. This session is for you if you're ready to elevate your PDF productivity!



Introduction

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Learning Objectives

Upon completing this session, you should be able to:

- List examples of PDF software vendors
- Differentiate between PDF options available from Adobe
- List at least two ways you can use PDFs in collaborative environments
- Identify critical steps in the process used to create fillable PDF forms

Defining The Portable Document Format

Adobe Systems developed the **Portable Document Format** (PDF) to render two-dimensional documents in a device-independent format. Adobe released its PDF generation tool, an open-architecture type-setting system for the print industry, in March 1985. It ran on a Macintosh Plus computer and produced output using an Apple LaserWriter or a high-resolution laser imagesetter, the Linotronic 300. Each PDF file encapsulates a complete document description that includes the text, fonts, images, and vector graphics that compose the document. Further, PDF files do not encode any information specific to the application software, hardware, or operating system used to create or view the document. This design ensures that a PDF document renders in precisely the same manner, regardless of its origin or destination.

PDF documents help business professionals satisfy several business objectives.

- PDF documents provide a means for archiving digital documents, which, in turn, minimizes or eliminates the cost of storing paper documents. Depending on the circumstances, you may choose to store electronic documents for indefinite periods.
- You can easily share PDF documents with others or use them to facilitate the review or modification of documents over time.
- Users can easily collaborate when working with PDFs.

- PDF documents have a format independent of any application, operating system, or physical device.

In short, PDF documents are valuable to business professionals, including those working in accounting and financial arenas, because they provide unparalleled standardization, flexibility, and security. Further, PDFs offer unequaled portability because they are platform, operating system, and application-independent.

Differentiating Your PDF Options

Some mistakenly believe that the **Adobe Acrobat** product line is the only option for creating and working with PDF documents. Although Adobe's platform is the market leader in PDF technologies, many other good options exist for managing PDF documents.

For instance, you can use the following tools as less expensive alternatives to the Adobe Acrobat platform.¹

- PDF Pro 10 (\$49.97)
- Soda PDF Editor Pro (\$69.00)
- Perfect PDF 10 (\$119.99)
- FreePDF (free)
- PDF24 Tools (free)
- Sejda PDF Editor (free)
- PDFgear (free)

The listings above represent only a sample of the PDF solutions available. If interested in any of these tools, note that the functionality available with these and other solutions varies widely. Therefore, should you opt for one or more of these tools, you should investigate their relative strengths and weaknesses before committing to any of these platforms.

Microsoft Office As A PDF Tool

In addition to dedicated PDF solutions, Microsoft Office provides deep PDF functionality. More specifically, Acrobat automatically installs the **PDFMaker** add-in in Microsoft Office. This add-in creates an **Acrobat** tab on the Ribbon, as shown in **Figure 1**. Additionally, the PDFMaker add-in modifies other selections on the **File** tab of the Ribbon.

¹ All prices obtained through internet searches and were accurate as of the publication date. However, prices are subject to change.

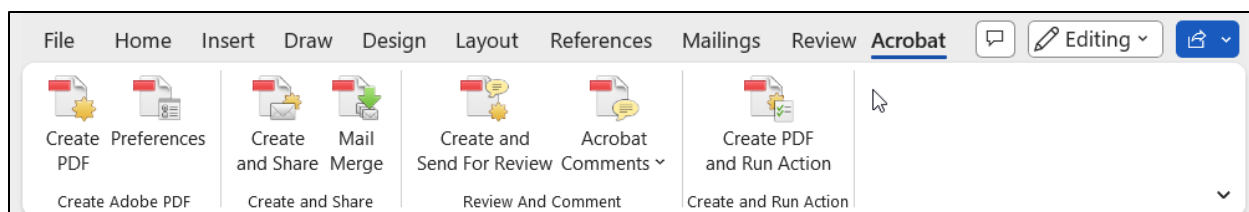


Figure 1 – Acrobat Add-in Tab in Microsoft Word

You can use buttons, menus, or Ribbon icons to create PDFs, attach PDFs to an email message, mail-merge Word documents to PDFs and send them by email, or create PDFs and send them for review in a simple, one-step process. In addition, the add-in also allows customization of a wide range of PDFMaker conversion settings. For example, you can specify 1) what general settings to use when converting the document to PDF, 2) what security settings to apply to the converted document, 3) how to deal with Microsoft Word comments, footnotes, and endnotes, and 4) what Word style elements to use in creating bookmarks.

To customize PDFMaker conversion settings, follow these steps.

1. Click **Preferences** on the **Acrobat** tab to open the **Acrobat PDFMaker** dialog box, as shown in **Figure 2**.
2. In the **Acrobat PDFMaker** dialog box, change the conversion preferences as desired and click **OK** to accept the changes.

In addition to creating PDFs from within Word, you can edit existing PDFs in the application. To do so, open Word. Then, open the PDF document you need to edit from within Word. When you do so, you can edit the text as if the text was recorded originally using Word. However, note that this feature will not be available if the PDF contains an image of the text.

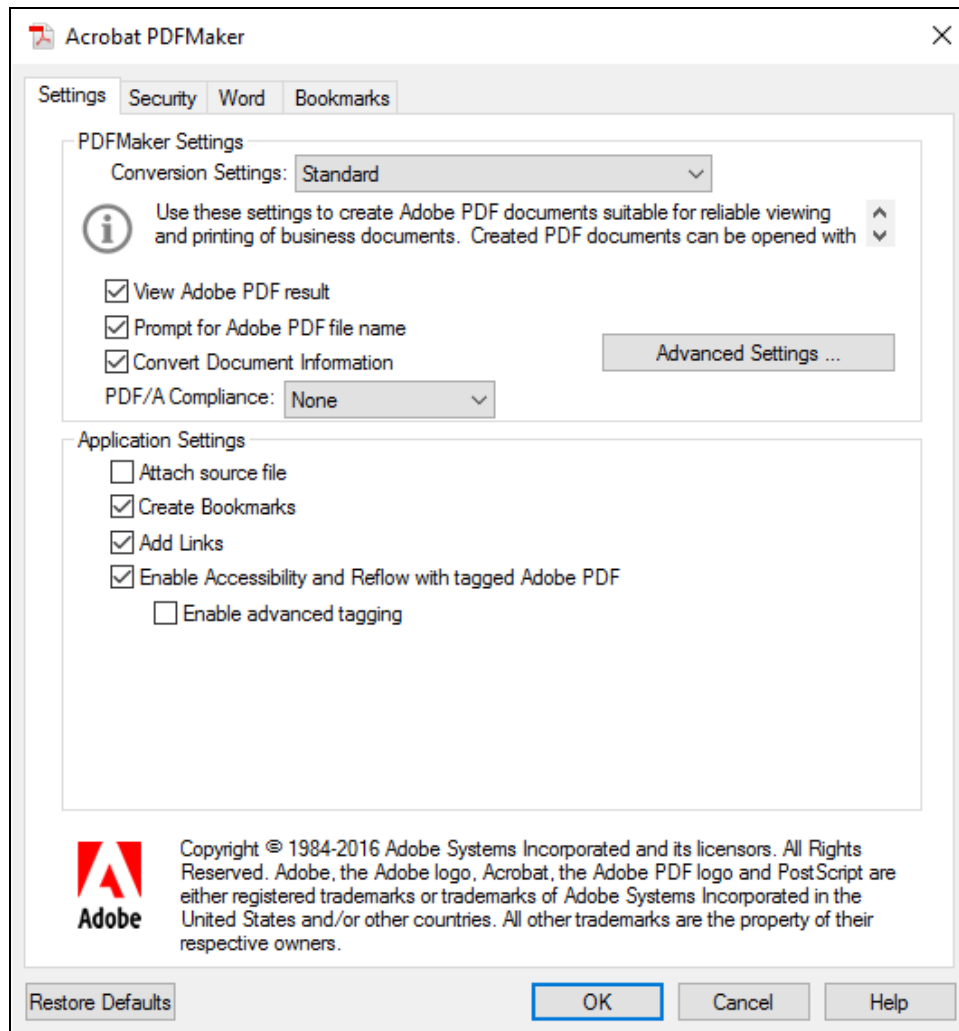


Figure 2 – Modifying PDFMaker Conversion Preferences

Creating PDFs

Because of their ubiquitous and almost-universal nature, numerous PDF creation options exist. Further, your decision on which method you choose can significantly impact other elements in a document, so choose wisely!

From Adobe Acrobat

Acrobat provides several options within the application to create PDF files. All the PDF creation commands are available from the menu by selecting **File, Create PDF**, as shown in **Figure 3**, or from the toolbar by clicking the **Create** icon, as shown in **Figure 4**.

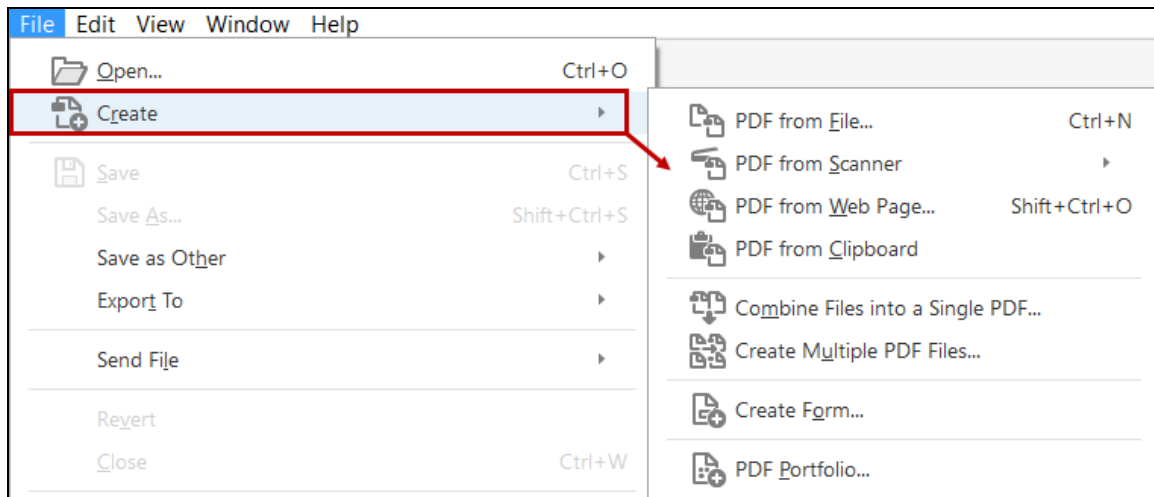


Figure 3 – Creating a PDF from the File Menu

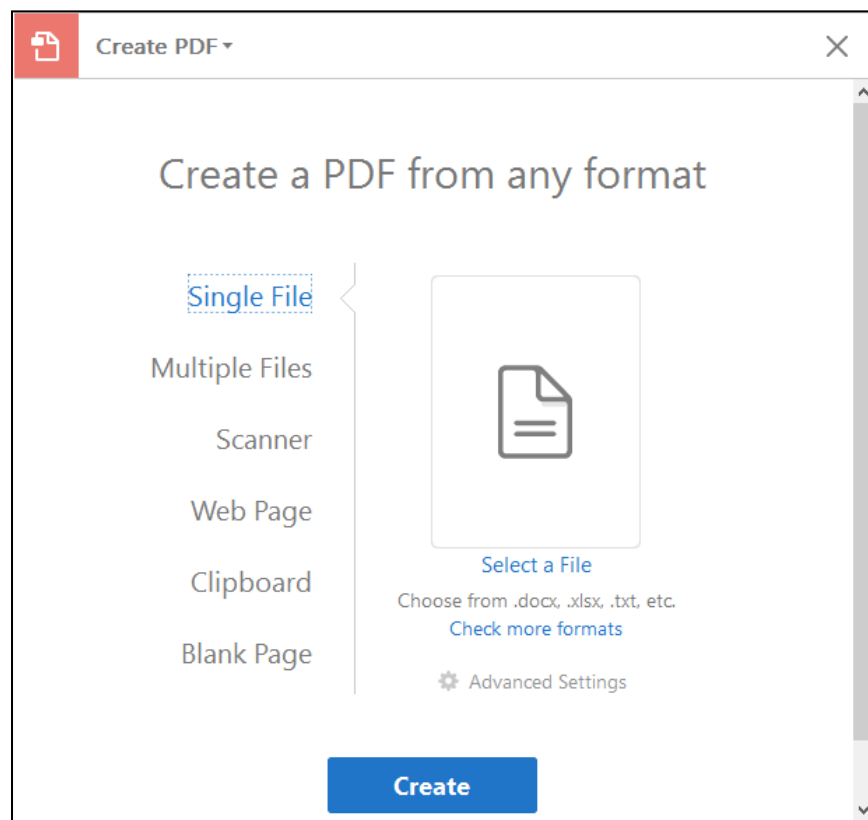


Figure 4 – Creating a PDF from the Toolbar

Creating a PDF from a File

One of the easiest ways to generate a PDF file is to select the **Create PDF from File** option. When doing so, Adobe presents an Explorer window to browse and select the file to convert. The file chosen must be a format associated with a registered application. In other words, the operating

system must know how to open the application that supports the selected file type to generate a PDF.

Creating a PDF from a Scanner

Acrobat can create a PDF document directly from a scanned image. Select **File, Create PDF, and From Scanner** from the menu to start the process. Alternatively, click the **Create** button on the toolbar and select **PDF from Scanner**. Next, choose from any of the scanner's preset settings – **Black & White Document, Grayscale Document, Color Document, or Color Image**. You can configure scanner presets to suit your needs by selecting **Configure Presets**. Alternatively, click **Custom Scan** to open the **Custom Scan** dialog box, as shown in **Figure 5**.

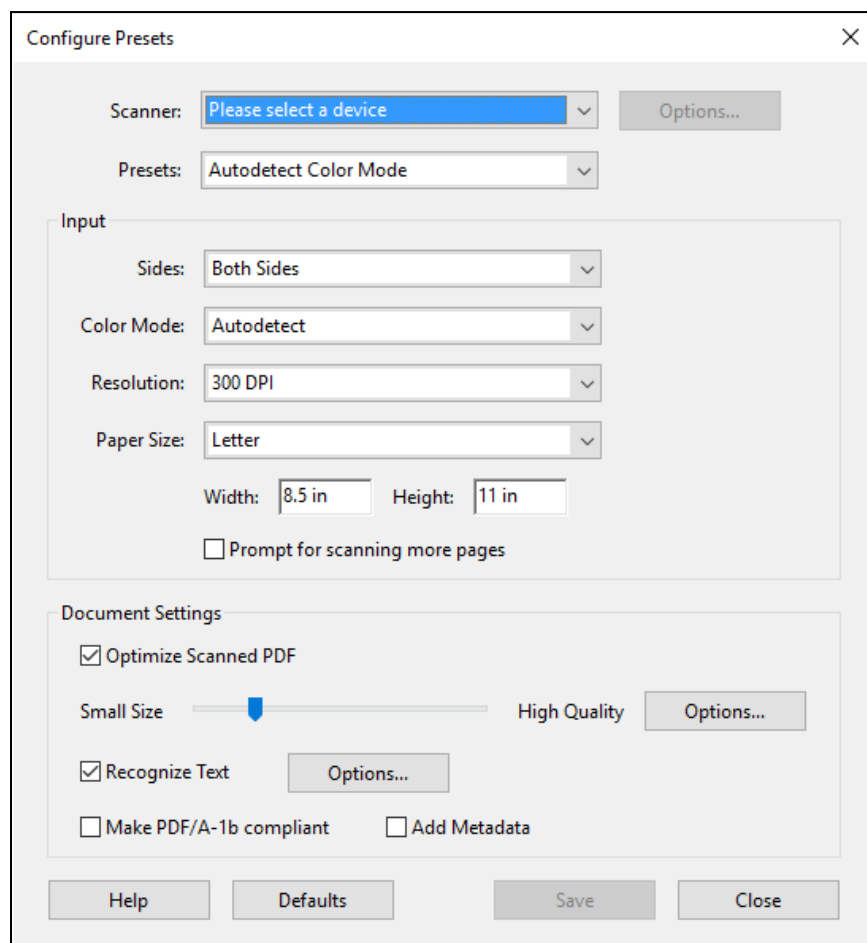


Figure 5 – Configuring Scan Settings in the Custom Scan Dialog Box

You should review the settings carefully because they affect the document's quality, size, and appearance. Note the options for **Sides** (Front Side or Both Sides), **Color Mode**, **Resolution**, and **Paper Size**. Select the radio button to create a new PDF or append the scanned document to an existing PDF. Also, note the slider used to select the quality of the created file. Higher-quality scans produce larger file sizes. Check the boxes labeled **Make Searchable (Run OCR)**, **Make PDF/A Compliant**, or **Add Metadata** if desired. The **Options** button allows users to adjust the

image settings to improve the quality of the scanned image. Click **Scan** to begin creating a PDF using the settings selected.

OCR after the Fact

Sometimes, you might scan documents without setting the OCR option. Under these circumstances, the scanning process merely creates an image of a document. The text is not searchable or selectable, and a simple cut-and-paste from the PDF yields an image instead of editable text. However, there is no need to re-scan a document because Adobe can perform OCR after the fact. From the toolbar, select the **Enhance Scans** and then choose **Text Recognition** to start the process, as shown in **Figure 6**. When the action is complete, the text in the document will be searchable and selectable, yielding satisfactory results in cut-and-paste operations.

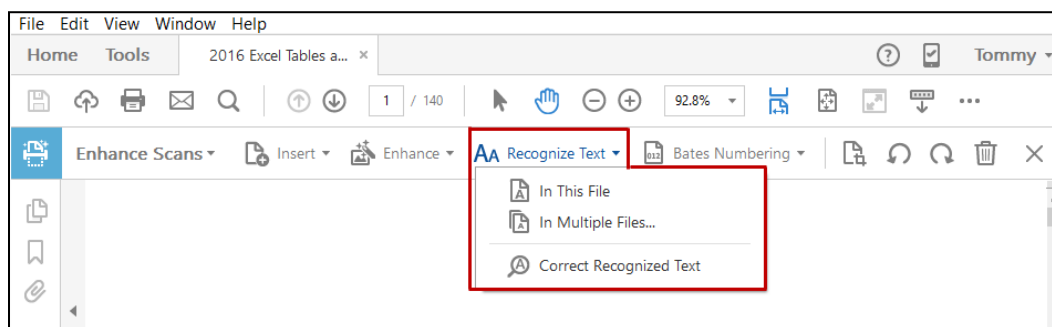


Figure 6 – Running OCR after the Fact

Figure 6 illustrates Acrobat can also recognize text using OCR in multiple PDFs simultaneously. For example, suppose a client sent multiple PDFs containing scanned receipts to support preparing a tax return, but none were searchable. In this case, you could process all the files for OCR with a single command.

Creating a PDF from a Web Page

You can use PDFs generated from web pages to document web-based research quickly and easily. The Internet is dynamic; pages and sites viewed today may change tomorrow. Creating a PDF from a web page is also an excellent method of capturing an article to read or review later. Sure, you can easily save a single web page as a PDF. But you can also encapsulate an entire website into a single PDF with hyperlinks to navigate it as if it were a live website. This feature, for example, would allow salespeople to access an online products catalog even when they are in a customer's office without Internet connectivity. They would need only to capture an up-to-date catalog from the Web before making their scheduled sales calls.

Select **File, Create PDF, and From Web Page** from the menu to create a PDF from a web page or website. Alternatively, click the **Create** button on the toolbar and choose **PDF from Web Page**. To capture a single web page, enter the appropriate URL and click **Create**, as shown in the upper panel of **Figure 7**.

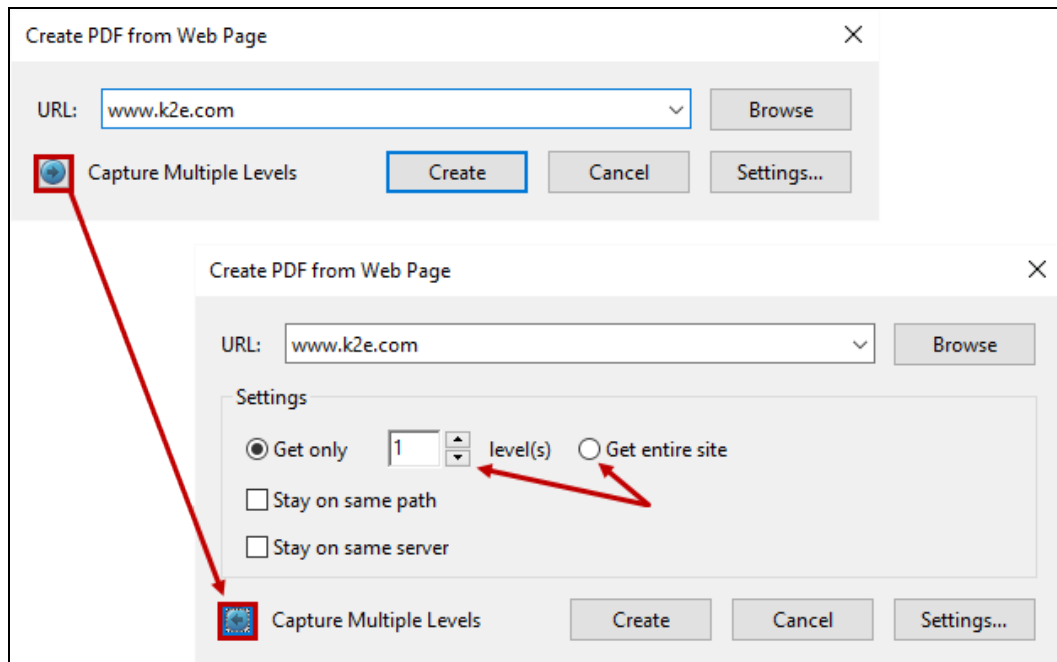


Figure 7 – Creating a PDF from a Web Page or Website

To capture all or part of a website, click the **Capture Multiple Levels** button in the bottom left-hand corner of the **Capture PDF from Web Page** dialog box. Next, enter the appropriate URL and select **Get entire site** or the number of levels below the home page to capture. Next, check whether to create the PDF from pages on the same path or the same server to reduce the PDF's size. Additional settings, such as whether to create bookmarks, are configurable by clicking the **Settings** button. The time required to capture an entire website depends on the website's complexity and size and your Internet connection speed.

Figure 8 displays a PDF created from K2's website. In this example, the PDF contains all the site's pages up to three levels below the home page. Acrobat built bookmarks automatically during the process. All hyperlinks work within the PDF just as they would have worked when accessing the website online. In this case, the PDF file created was less than one megabyte.

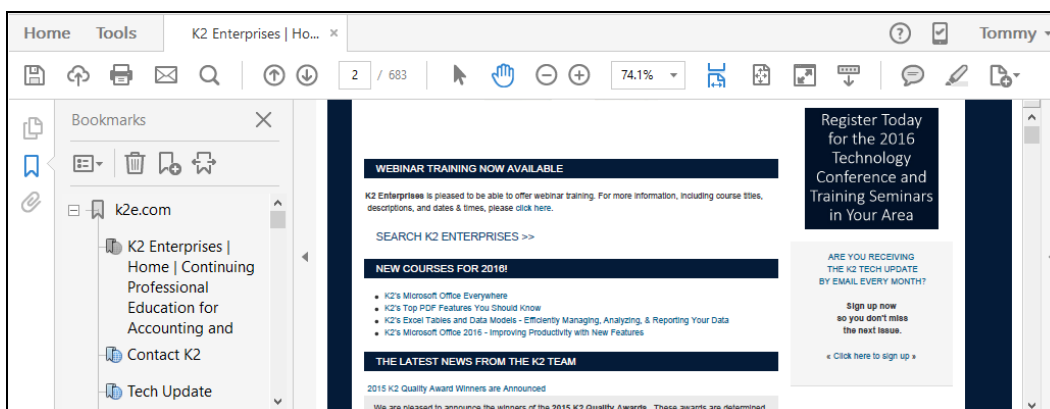


Figure 8 – PDF Created to Capture an Entire Website

Creating a PDF from a Clipboard Image

You can create a PDF from any image copied to the system clipboard. First, copy an image to the clipboard using any method desired. Then select **File, Create, PDF From Clipboard** from the menu or click the **Create** button on the toolbar and choose **PDF from Clipboard**.

Creating a PDF from Multiple Files

Acrobat provides two ways of creating a PDF document from multiple files: 1) merging files into a single PDF and 2) assembling a PDF Portfolio. Merging multiple files creates a single PDF document while maintaining the internal structure of the original files. For example, you can select specific pages of Word documents or Excel worksheets for merging. You can also rearrange the documents or parts of documents in any order before processing the merge. During the merging process, Adobe converts all files to a PDF binder.

Assembling a PDF Portfolio is similar, but it yields very different results. A PDF Portfolio allows users to accumulate multiple files – of any type – within a single portfolio file. Acrobat does not convert the selected files to PDF documents; instead, they retain native formats in the “wrapper” of the portfolio.

Merging Files into a Single PDF

Merging files is a great option to use at the end of a project, audit, or compilation for accumulating all the working files into a single PDF to serve as an archive or historical record. The files combined need not be PDFs but can be working documents in other formats such as Excel, Word, PowerPoint, AutoCAD, or Visio.

Select **File, Create PDF, and Combine Files** to merge files. Alternatively, click the **Create** button on the toolbar, select **Combine Files into a Single PDF**, or click the **Tools** pane and select **Combine Files into a PDF** on the **Pages** menu. You can add files or folders by clicking the **Add Files** button and browsing to the file locations. Alternatively, you can use the drag-and-drop functionality to move files into the **Combine Files** window. Next, select specific pages or worksheets by clicking on the plus sign above a document to expand the content and choose the desired pages. Finally,

rearrange the order of the content, specify an appropriate file size, and then click **Combine Files**, as shown in **Figure 9**.

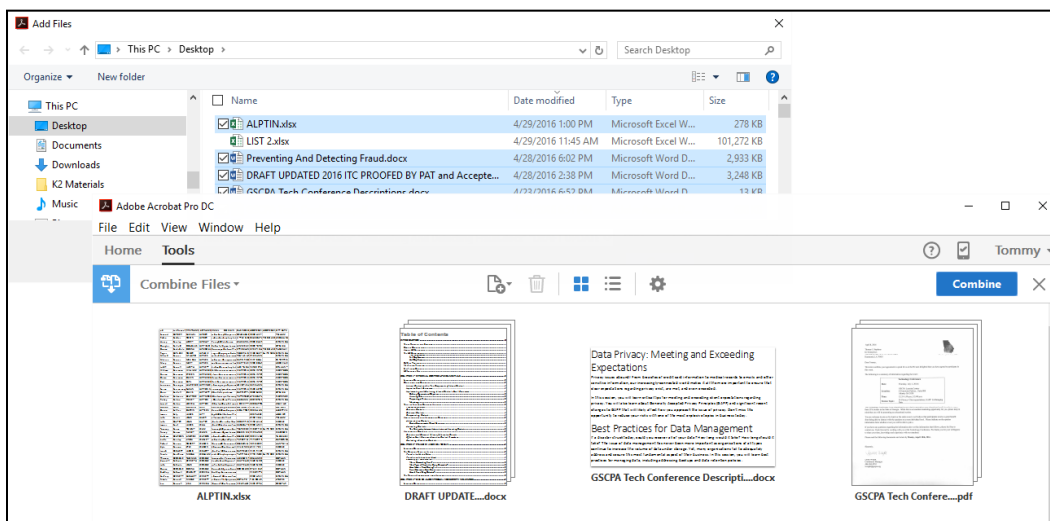


Figure 9 – Merging Files into a Single PDF

Assembling a PDF Portfolio

Select **File**, **Create**, and **PDF Portfolio** from the menu to assemble a PDF Portfolio. Alternatively, click the **Create** button on the toolbar and select **PDF Portfolio**. Acrobat Pro will create an empty or “shell” portfolio. You can then complete the portfolio creation process by dragging and dropping files or folders into the portfolio and clicking **Create** in the window’s lower right corner.

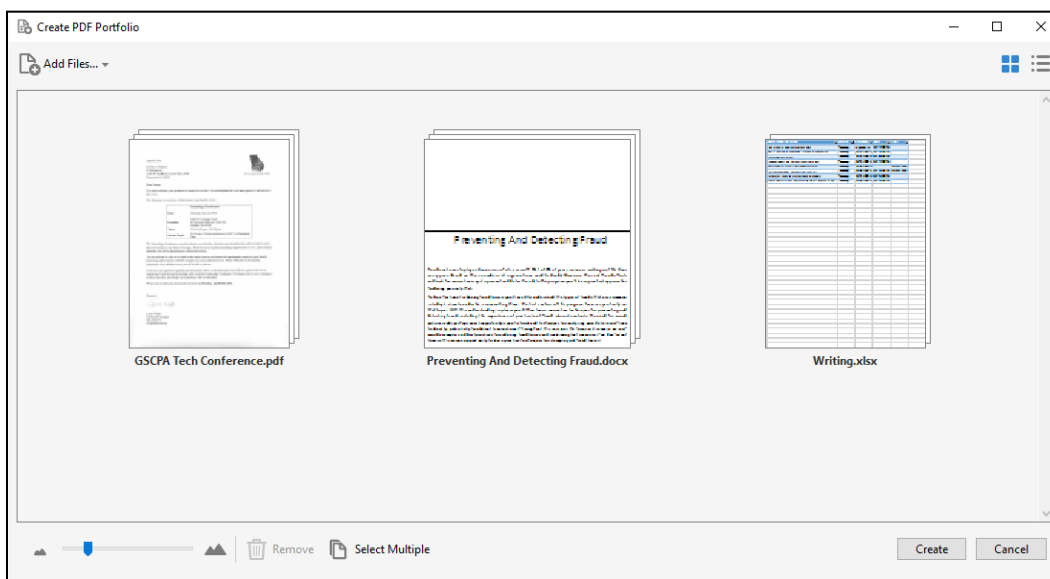


Figure 10 – Creating a PDF Portfolio

Creating a Batch of Individual PDFs

When you need to convert multiple documents or spreadsheets into individual PDF files, Acrobat can batch-process various source files into separate PDFs. First, select **File**, **Create PDF**, and **Batch Create Multiple Files** from the menu to open the **Batch Create Multiple Files** dialog box shown in **Figure 11**. Next, add files or folders, like merging files into a single PDF, and click **OK**.

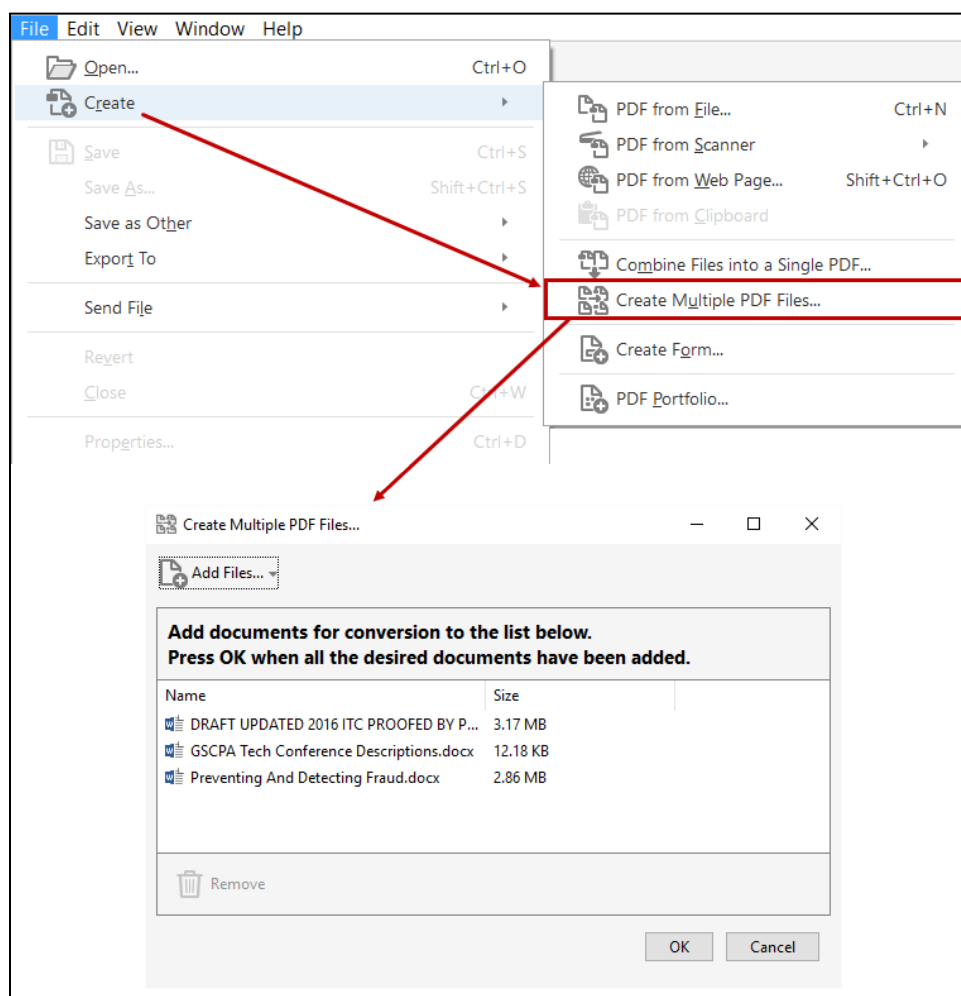


Figure 11 – Processing Multiple Files into Individual PDFs

From A Microsoft Office Document

If you need to create a PDF from an open document, select **Create PDF** on the **Acrobat** tab, specify a name and location for the PDF file in the **Save Adobe PDF File As** dialog box, and click **Save**.

One of the significant advantages of PDFMaker is that it understands formatting, such as styles from Microsoft Word documents. PDFMaker can convert formatting section headings into bookmarks in PDF automatically. It can also convert Word tables of contents into clickable tables of contents in PDF. For users unfamiliar with Word styles and formatting, the Styles gallery allows users to apply consistent formatting to a document quickly and easily. Users can set font types

and sizes and designate specified text as headings or subheadings. **Figure 12** shows the **Styles** gallery in Microsoft Word. To fully understand the importance of styles and their potential impact on working with PDFs in Acrobat, let us briefly review the use of styles in Microsoft Word.



Figure 12 – The Styles Gallery in Microsoft Word

If the formatting in a Word document is applied using styles, the metadata or structure of the document will be intact in the PDF document after conversion. By default, subject headings convert to bookmarks, and tables of contents entries are converted to hyperlinks to allow quick navigation to a specific section or page in the PDF document. **Figure 13** displays the bookmarks in a PDF document created automatically during conversion.

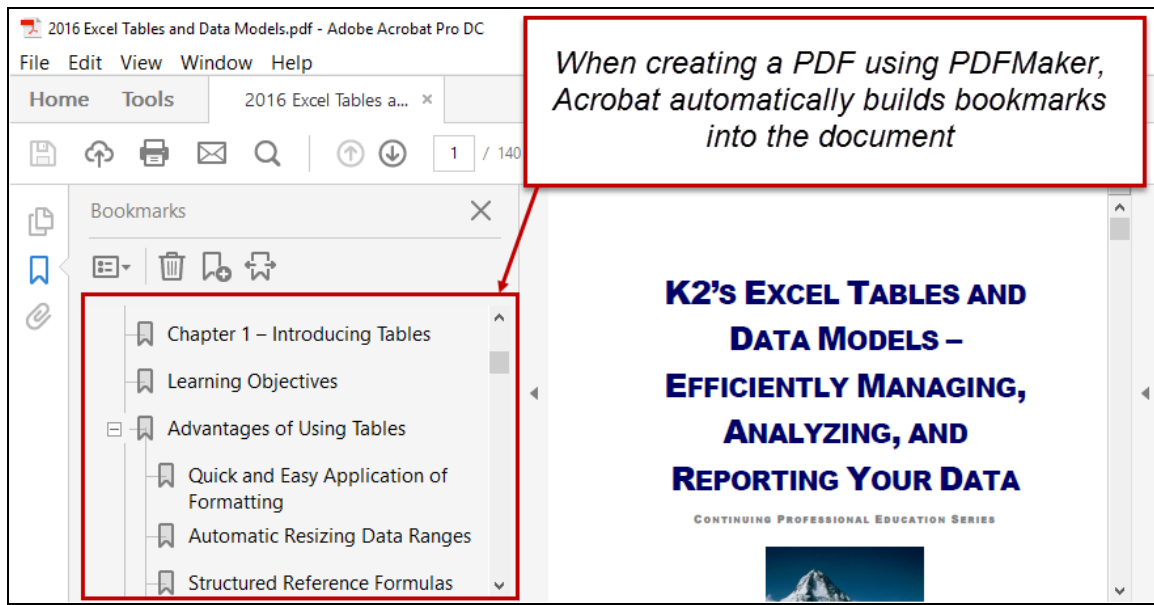


Figure 13 – Bookmarks Created Automatically in Acrobat from Word Styles

Acrobat created the bookmarks automatically from the styles applied to the section headings in the original Word document. This Microsoft Word document also had a table of contents generated from the styles used. While creating the PDF, PDFMaker built a clickable table of contents with each entry a hyperlink to its respective location in the PDF. The table of contents allows readers of the document to navigate its content easily.

Collaborating With PDFs

You can send documents to others and track their status online using Acrobat Standard and Pro. This process does not send the PDF directly to the individual. Instead, it stores it in the Document Cloud and sends a link to the document, so recipients can click on the link to view or download the file. The advantages to this procedure include improved security because sending email attachments is a notoriously unsecured means of sharing information and the ability to track who has opened or downloaded your documents.

Open a document in Acrobat Standard or Acrobat Pro to utilize this feature. Next, click **Send & Track** in the **Tools Pane**. If necessary, you can add additional files you would like to share. Next, select **Create Anonymous Link** or **Send Personalized Invitations**. If you choose the anonymous link option, Acrobat will create a link you can copy and share with recipients; this option provides only basic tracking information. If you choose the personalized link option, the Document Cloud delivers individual links to each recipient based on her email address. Further, the Document Cloud provides detailed tracking information when using this option. Add a subject line and message, and click **Send** to complete the task of sending the file.

Selected Files + Add Files

2016 Mississippi Society of CPAs Technology Conference Br....pdf

☐ Create Anonymous Link (with basic usage information)

☒ Send Personalized Invitations (with detailed tracking)

Send To Address Book

tommystephens@gmail.com × demo@k2e.com × ?

— Recipient Page —

☐ Add Your Logo & Color (Edit)

Subject & Message

Shared Files

I have shared some files with you. Please click on the link to view and download them.

Send Cancel

Figure 14 – Sending Documents Using Acrobat’s Share and Track Feature

Using the personalized invitation feature, those you send the invitation will receive a message that appears like the one in **Figure 15**. Of course, clicking **View File** will allow the recipient to view the document and provide the option of downloading it.

Tommy Stephens via Adobe Send & Track <noreply@acrobat.com> 3:39 PM (0 minutes ago) ☆

to me

Adobe Document Cloud

I have shared some files with you. Please click on the link to view and download them.

Click on the button or use the link below to view and download the file and to let Tommy Stephens know that you've received it.

<https://files.acrobat.com/a/preview/7193f7dd-b9d3-4613-96c3-15e9c7637d76>

View File

2016 Mississippi Society of CPAs Technology Conference Brochure.pdf

Powered by [Adobe Document Cloud](#) | [Terms of Use](#) | [Report Abuse](#)

Figure 15 – Message Sent to Recipients of a Shared PDF Document

If you are the document's sender, you can track and manage the documents you sent by clicking **Home**, **Sent** in Acrobat.

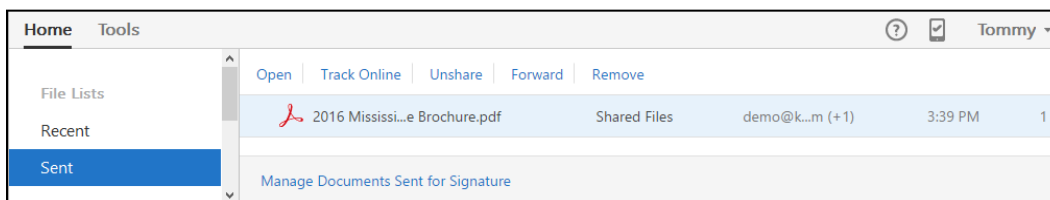


Figure 16 – Tracking Documents Sent through Acrobat's Send and Track Feature

Clicking the **Track Online** link near the top of the window provides up-to-date information about which recipients have viewed and downloaded the document, including the date and time of the activity. **Figure 17** illustrates the information provided in that audit log.

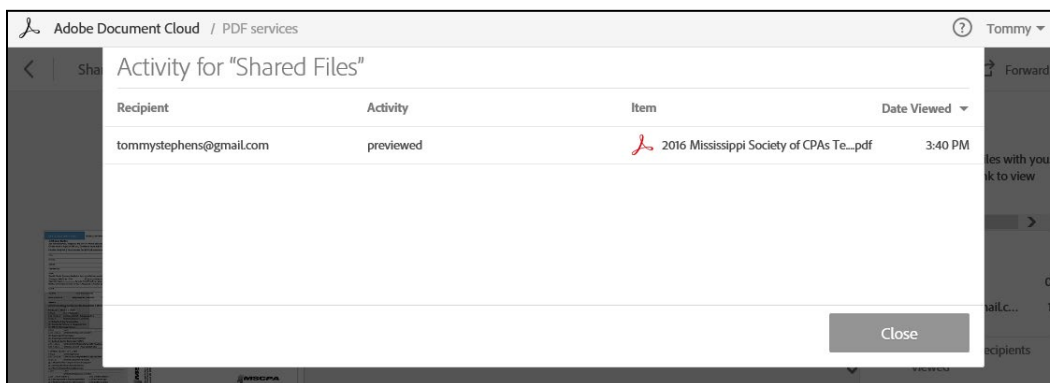


Figure 17 – Viewing Detailed Activity for a Shared File

Editing Your PDF Documents

In addition to an advanced set of markup tools beyond this course's scope, Acrobat offers an array of text- and graphics-based commenting tools – sticky notes, text boxes, callouts, text highlighters, shapes, and lines – for commenting on documents.

Sticky Notes

The ubiquitous sticky note is one of the most common means of annotating documents. To add a sticky note to a PDF, click the **Sticky Note** icon on the toolbar or right-click where you want to place your note. Then select **Add Sticky Note** from the contextual menu that appears.

Sticky Notes have a common yellow border by default. The note's title bar contains the name of the person who added the note, the date and time it was added, and an **Options** button that allows users to perform everyday tasks. To reposition a note, click on its title bar and drag it to its new location. To resize a note, click and drag one of its bottom corners.

In default, notes minimize once you navigate away from them. To redisplay a minimized note, click or double-click on the note anchor. To view a note temporarily, hover the cursor over the

note's anchor, as shown in **Figure 18**. To delete a note, click and highlight its anchor and then press **Delete** or right-click on the anchor or the note body and select **Delete** from the context-sensitive menu.

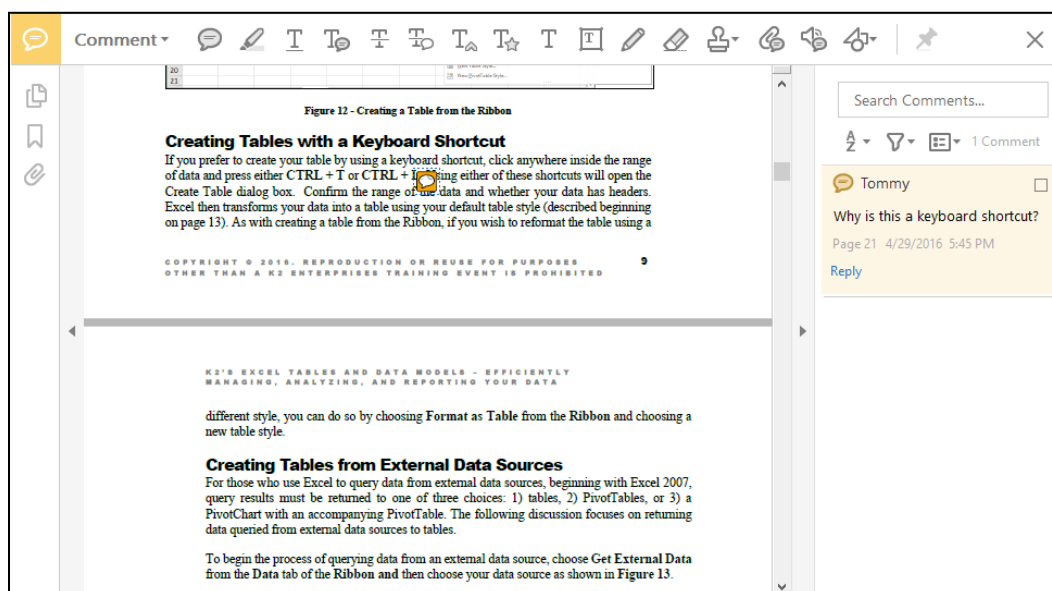


Figure 18 – Working with Sticky Notes

To change the color of a note and its anchor, click **Options, Properties** in its title bar. Next, click the **Color** box on the **Appearance** tab, select the desired color, and click **OK**. To make the chosen color the default for all notes created in all documents, right-click on the header of a note and select **Make Current Properties Default**. Alternatively, click **Options, Properties**, and check the **Make Properties Default** box. Click **OK** to complete the process. Customizing the color of notes by user is very effective in small offices. Each user can choose a different color for notes so that the color becomes a visual cue for who created it. Further, replies to notes are more difficult to overlook because the original message and another reviewer's reply appear in different colors.

To reply to a note, click **Options** and **Reply** in the note's title bar. Alternatively, right-click the anchor or note header and select **Reply** in the context-sensitive menu. You can reply directly from the **Comments List** by right-clicking on the note and selecting **Reply** from the context-sensitive menu. Alternatively, you can select **Reply** under the **Options** button on the **Comments List** toolbar. Note that the first reply to any Sticky Note is nested within the original note. Responses to previous replies appear in the **Comments List**. Acrobat links these replies at the bottom border of the initial reply in a thread.

Text Boxes and Callouts

A **Text Box** is a rectangular box where a user can enter text. Text boxes float over a document; you can position them anywhere in a PDF, as shown in **Figure 19**. Business professionals often use text boxes for general comments or information about a document. To create a Text Box,

click the **Add Text Box** button on the **Comment** toolbar, position the cursor in the document, and click and drag a sufficient-sized rectangle. Type the desired text into the box and then click outside of the box to end the process. Resize or reposition the box as required.

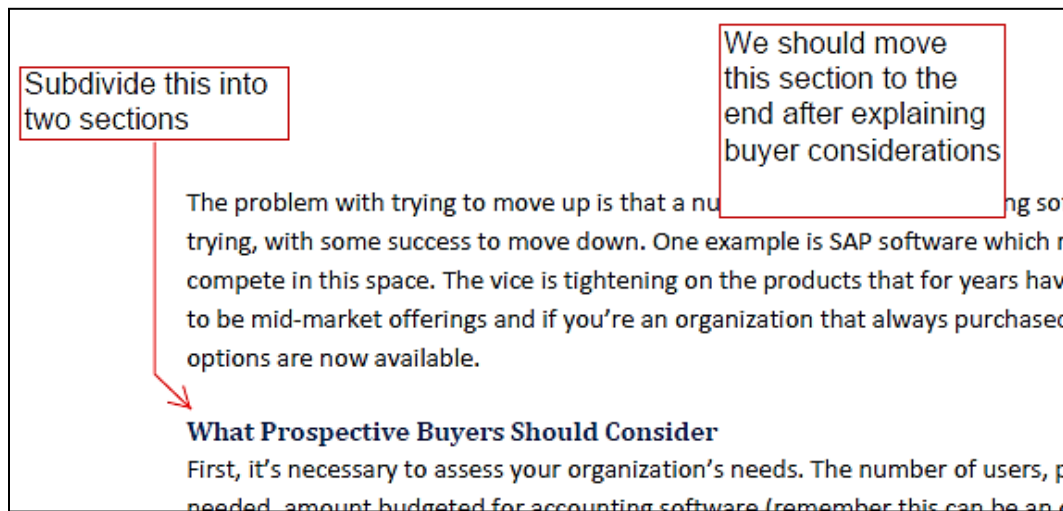


Figure 19 – Text Boxes and Callouts

Callouts are simply text boxes with an arrow anchor. To create a Callout, go to **Drawing Markups** on the **Comment** toolbar and click the **Text Callout** button. Then click and release the mouse at the location that will anchor the arrow point. Next, click and drag to establish the callout box's size and position. Finally, type the desired text into the box and click outside to end the process, as shown in Figure 19.

To set the line color and weight of a Text Box or a Callout, click to highlight the object and then right-click and select **Properties** from the context-sensitive menu. Alternatively, you can set the line characteristics by pressing **CTRL+E** to open the **Properties Box**. To set the font face, color, and size, highlight the text inside the box and then adjust the settings using the Properties Box. To make these settings the default for all Text Boxes and Callouts created in all documents, right-click on the object and select **Make Current Properties Default**. Note that the font face and font size set in Commenting Preferences do not impact the text entered in Text Boxes or Callouts.

Highlighter

You can use the Highlighter tool to mark or call attention to the text in a document. First, click the **Highlighter** button on the **Comment** pane under the **Annotations** section and then drag the cursor to select the text to highlight. You can customize the text highlight color by right-clicking on the highlighted area and selecting **Properties** or in the **Properties Box** that opens when you press **CTRL+E**. By default, the Highlighter only marks one text selection at a time, requiring a user to click the Highlighter button to highlight a text passage and then click the button again to highlight more text. This process can be tedious if you highlight multiple text selections. To remedy this frustration, right-click the Highlighter tool icon and check **Keep Tool Selected** on the

contextual menu, as shown in **Figure 20**. Once selected, a user can progress through a document and highlight multiple text selections without clicking the Highlighter button repeatedly. To deactivate the Highlighter tool, press **ESC**.

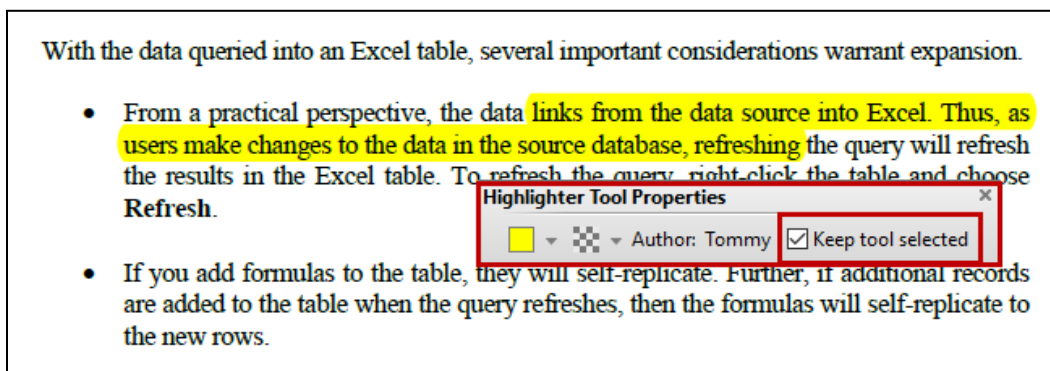


Figure 20 – Using and Configuring the Highlighter

You can associate an explanation or comment to highlighted text in the **Comments List**. First, locate the Comment in the list and then enter an explanation or comment in the available text box, as shown in **Figure 21**.

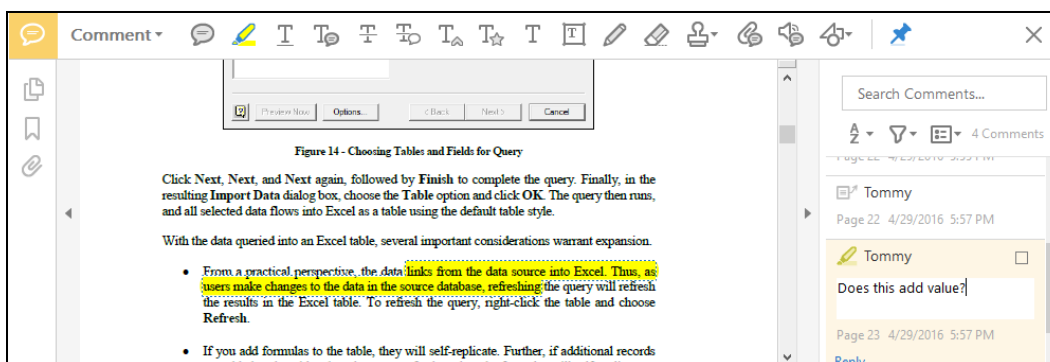


Figure 21 – Associating an Explanation with Highlighted Text in the Comments List

Business Stamps and Tick Marks

Acrobat comes preconfigured with a large selection of standard business stamps. Some are static, and some are dynamic. Dynamic stamps include the current date, time, or user's name in the stamp body, as shown in **Figure 22**. You can establish the name displayed in dynamic stamps in Preferences. Select **Edit, Preferences, and Identity** from the menu to specify or edit these settings. Stamps also have associated pop-up notes that you can display to add additional detail. Just double-click a stamp to show or hide its note.

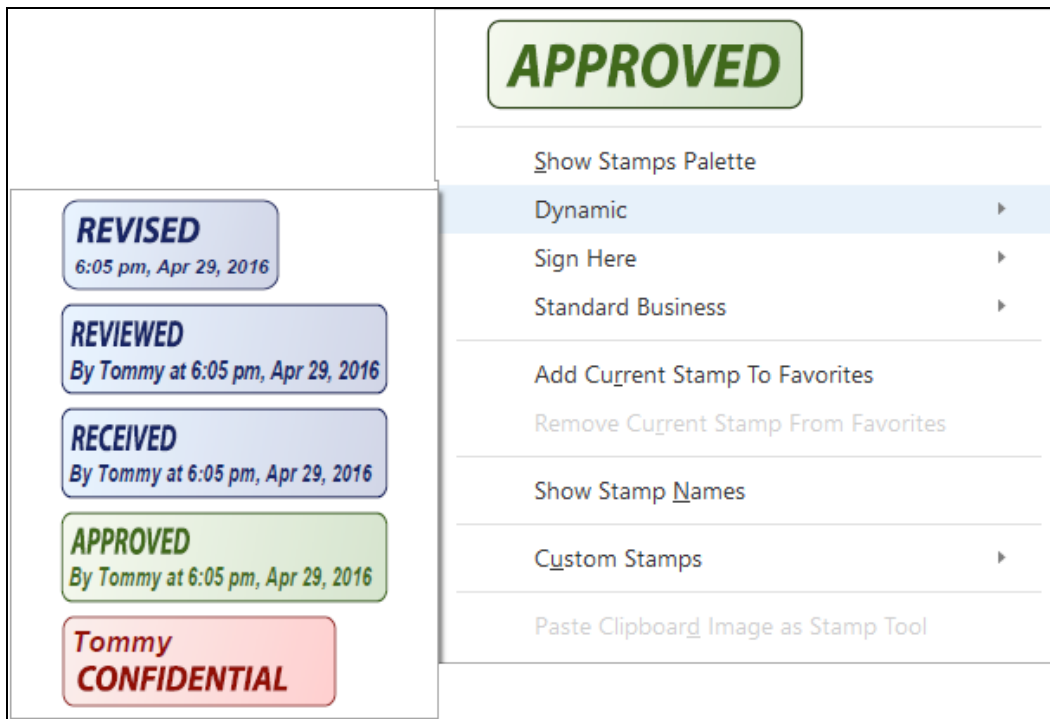


Figure 22 – Standard Business Stamps Available in Acrobat

Stamps can be applied by selecting the **Comments** toolbar and then clicking **Add Stamp**. Once you choose the **Stamp Tool**, select a stamp group – **Dynamic**, **Sign Here**, or **Standard Business** – and then click on the desired stamp. Use the mouse to position the transparent stamp cursor in the document and then click and release on the face of the document to place the stamp.

Alternatively, you can apply stamps from the Stamps Palette. To display the Stamps Palette, click the drop-down arrow on the **Stamp Tool** and select **Show Stamps Palette**, as shown in **Figure 23**. Next, select the appropriate Stamps group from the drop-down list. Finally, to apply a stamp, click the stamp in the **Stamps Palette** and then click on the document face, using the process previously described.

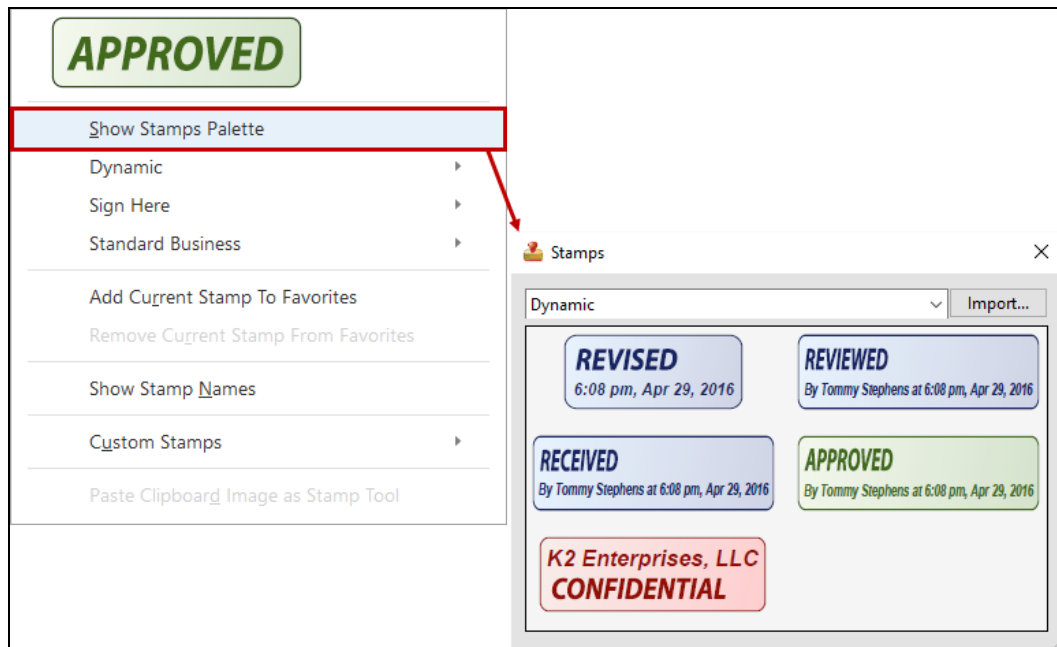


Figure 23 – Acrobat Stamps Palette

Add Text Tool

The **Add Text Tool** allows you to type characters in PDF documents, like using a typewriter to add text to paper documents. You can select the font, color, and size and adjust line spacing. This tool is handy for filling PDF forms that are static scanned images of paper forms. In addition, you can move each typed element as a separate object. If the text doesn't align with the form, you can click and reposition it accordingly. The Add Text tool is accessible by selecting **Text** from the **Comment** toolbar.

Edit Text & Images Tool

This tool's text editing capabilities allow users to modify a PDF's text, which can be beneficial when the source document is unavailable. In addition, the feature facilitates correcting spelling, grammar, or calculation errors. However, bad actors can use this capability to commit fraud, such as modifying documents for financial gain.

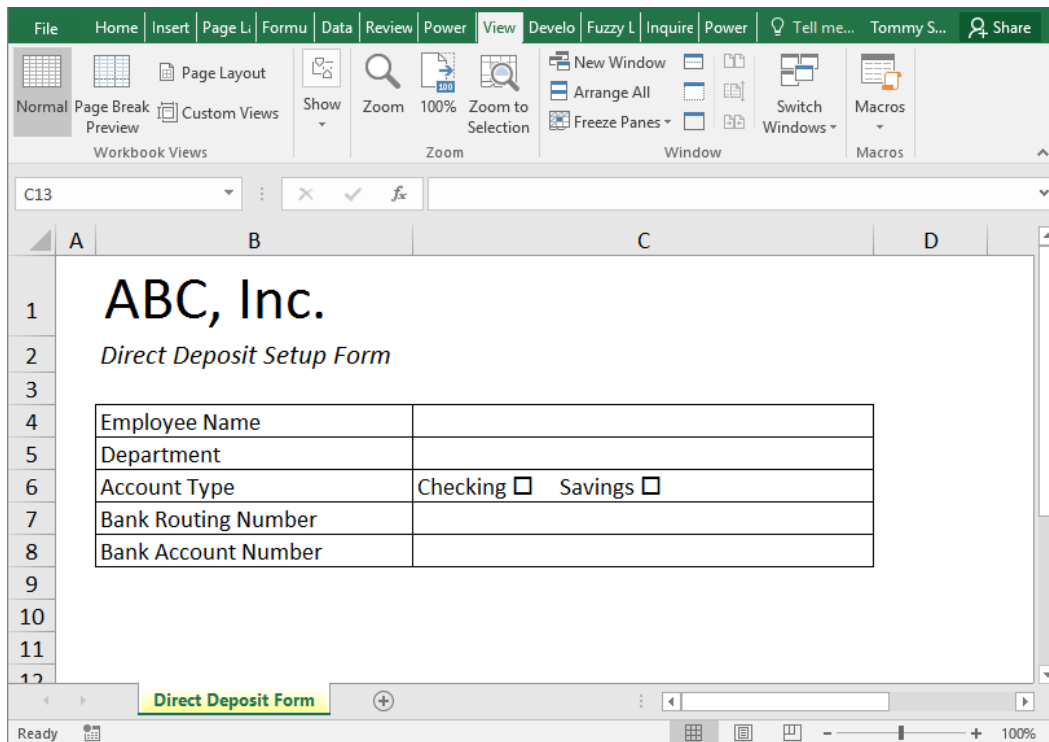
To use the **Edit Text & Images Tool** to work with text, place the cursor on the text that requires edits and select **Edit** from the **Edit PDF** toolbar. Acrobat will identify the area around the cursor in a blue border to show users what content they can manipulate from the current cursor placement. You can now make the necessary modifications. If the base font is unavailable in the document, click **OK** to allow Acrobat to substitute a closely matching font. Next, click outside the blue border and press **ESC** to end the process. Finally, save the file with a different name to preserve the original PDF.

Creating Fillable PDF Forms

Creating simple PDF forms is a quick, easy, and straightforward process. You can create forms from existing electronic documents or existing paper forms. Acrobat analyzes an electronic document or a scanned image of a paper form during the procedure and determines what fields it should place on the new PDF form. Generally, you only need to make minor adjustments to the form created to complete the process.

From an Electronic Document

In this example, we will create a simple Direct Deposit Information form from the existing Microsoft Office Excel document pictured in **Figure 24**.



The screenshot shows a Microsoft Excel spreadsheet with the following content:

	A	B	C	D
1		ABC, Inc.		
2		Direct Deposit Setup Form		
3				
4		Employee Name		
5		Department		
6		Account Type	Checking ☐ Savings ☐	
7		Bank Routing Number		
8		Bank Account Number		
9				
10				
11				
12				

The spreadsheet is titled "Direct Deposit Form" and is displayed in the "View" tab of the Microsoft Office Excel ribbon. The status bar at the bottom indicates "Ready" and "100%".

Figure 24 – Microsoft Office Excel Document to Convert to Fillable PDF Form

Because the document is already in electronic form, converting it to a PDF requires only a few keystrokes.

1. Select the **File, Create, Create Form**, and select the existing file to use as the foundation for your form.
2. Confirm that the foundational document is the one that you want to use. Then click **Start** to transform the original document into a fillable form, as shown in **Figure 25**.

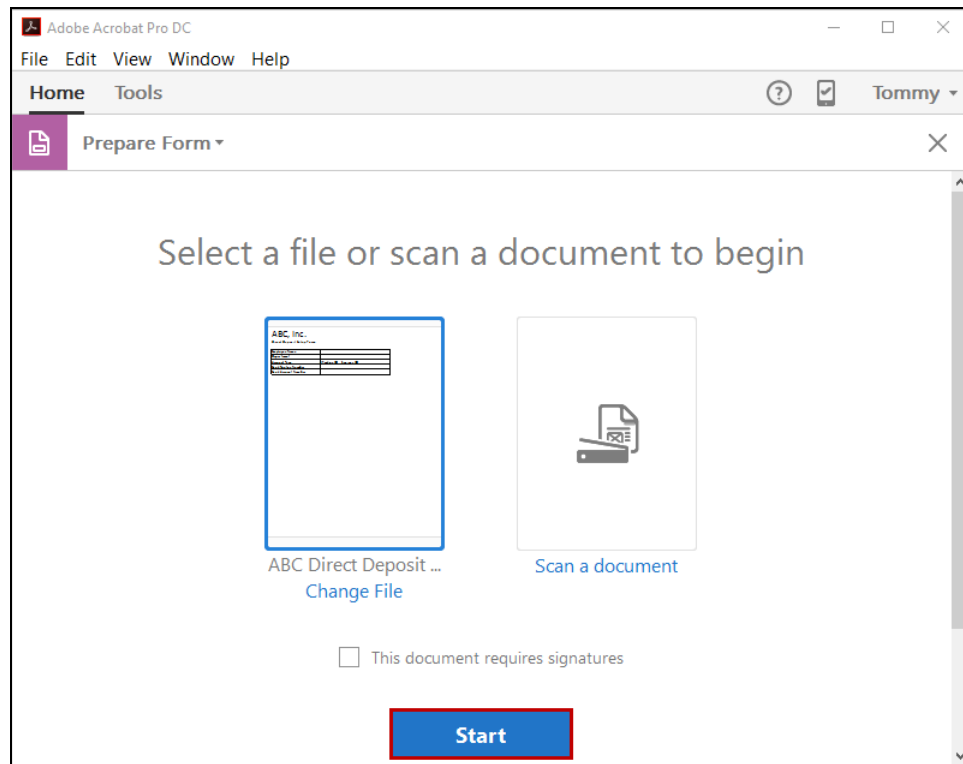


Figure 25 – Selecting and Confirming a Foundational Document for Converting to a Fillable PDF Form

3. Acrobat then starts the conversion process and, as shown in **Figure 26**, displays a draft of the fillable PDF form upon completion.

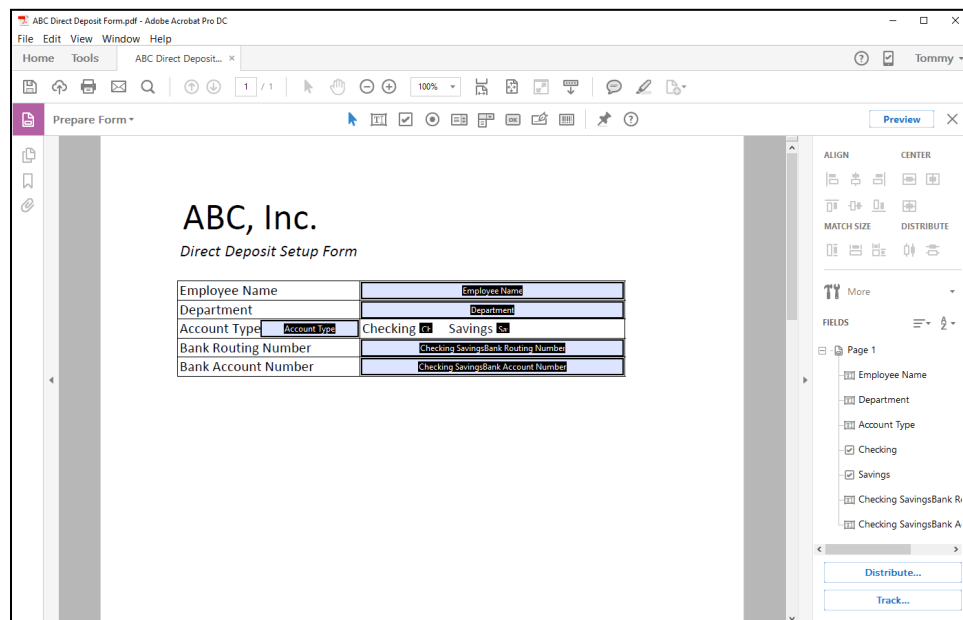


Figure 26 – Selecting a File for Converting to a PDF Form

When converting an existing electronic document to a PDF form, Acrobat analyzes the document for potential form fields and automatically converts those fields to click-and-fill fields in the PDF form. However, the conversion process is imperfect, as shown in **Figure 27**. Note that Acrobat created a “false field” entitled *Account Type*.

ABC, Inc.
Direct Deposit Setup Form

Employee Name	Employee Name
Department	Department
Account Type	Account Type
Bank Routing Number	Checking Savings Bank Routing Number
Bank Account Number	Checking Savings Bank Account Number

Figure 27 – Converted Word Document as a PDF Form Showing Field Errors

Fortunately, you can resolve the errors quickly. For example, click on the field to remove the false Account Type field and press **Delete**.

In some cases, it might be necessary for you to edit other fields. For example, though Adobe’s form creation tool appropriately recognized the checkboxes for **Checking** and **Savings** and added them as form fields, changing their field types from checkboxes to radio buttons is necessary. The deposit bank account can be a checking or a savings account, but not both. Therefore, radio buttons are an excellent choice to prevent users from selecting **Checking** and **Savings** as the account type. To ensure that a radio button selection is exclusive within a button group, ensure that all button fields in the group have the same Radio Group Name.

To establish **Checking** and **Savings** as radio buttons, delete the two checkboxes created by Acrobat. Then, click the Radio Button icon on the Prepare Form toolbar, and with your mouse, draw the location where you want the radio button for the **Checking** field to appear. Next, as shown in **Figure 28**, the pop-up properties dialog box establishes **Checking** as the Radio Button Choice name and **Account Type** as the Group Name. Additionally, indicate that this is a *required* field. Finally, click **Add Another Button** and repeat the process for the Savings field, ensuring that you rename it **Savings**.

ABC, Inc.

Direct Deposit Setup Form

Employee Name	Employee Name
Department	Department
Account Type	Checking ☒ Savings ☐
Bank Routing Number	
Bank Account Number	

Radio Button Choice: ⓘ

Checking

Group Name:

Account Type

☒ Required field [All Properties](#)

⚠ Warning: 1 button in group. At least 2 buttons needed.

[Add Another Button](#)

Figure 28 – Adding a Radio Button to a Fillable PDF Form

Upon completing this process, you should see **Checking** and **Savings** as options under **Account Type** in the field list, as shown in **Figure 29**.

FIELDS

Page 1

- Employee Name
- Department
- Checking SavingsBank R
- Checking SavingsBank A
- Account Type**
 - Checking
 - Savings

[Distribute...](#)

[Track...](#)

Figure 29 – Radio Buttons Added to Fillable PDF Form

If desired, you can change the appearance of the newly added radio button so that it looks like checkboxes instead of circles. To do so, right-click on **Account Type** in the field list, and choose **Properties**. Then, change the **Button Style** to **Check** on the **Options** tab, as shown in **Figure 30**.

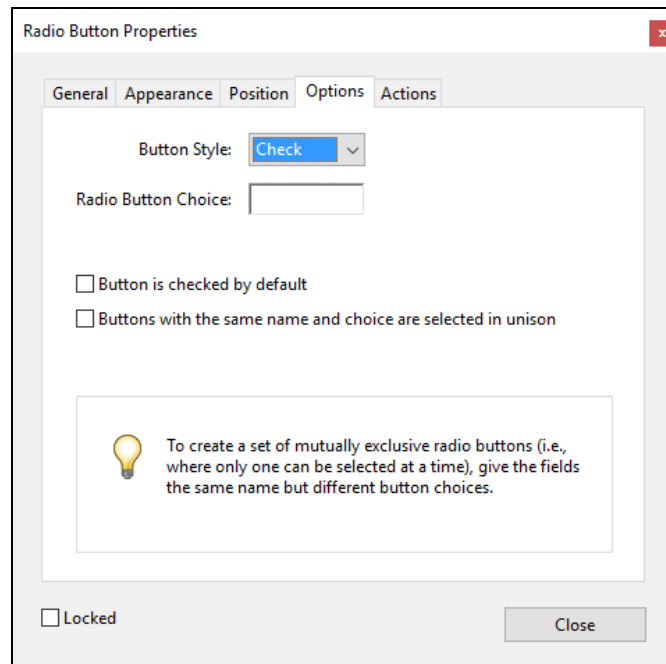


Figure 30 – Changing a Radio Button's Appearance

Of course, you can continue to modify the appearance of the form and its functionality by adding and editing other objects to the extent necessary. Upon completing these customization tasks, your form is ready to distribute to others. Beyond the scope of this program, know that Adobe offers **Distribute and Track** tools to assist in distributing forms to others and tracking their responses. More specifically, these tools can assist you when distributing your forms via email or on a server. They can also help you identify which team members have responded and which may require follow-up.

Creating a PDF Form from a Paper Document

The example above identified the steps required to convert an existing electronic document – Word, Excel, PDF, and others – to a fillable PDF form. If the file you want to base your PDF form on is paper-based, converting it to a fillable form is simple. Like the example above, select **File**, **Create**, and **Create a Form**. However, you would next select **Scan a Document** and scan the paper-based form into Acrobat. Upon doing so, Acrobat would recognize the fields on the paper-based document and convert them into fillable ones on the newly created PDF form, just as it did when beginning with an electronic file. Once the field recognition process completes, you can perform any necessary edits and corrections to finalize your PDF form.

Securing PDFs

As more accounting firms, commercial businesses, and organizations move to paperless processes, protecting the confidentiality and privacy of information has become the most critical issue they face in their transition.

Acrobat provides a broad range of tools and functionality for protecting sensitive information and securing documents while facilitating the exchange of information. With Acrobat, users have the following four capabilities.

1. Control access to a document;
2. Assign specific permissions to document users;
3. Identify who created or signed a document; and
4. Ensure that no one alters a document.

This section covers two of Acrobat's most common security and privacy features – *password protection* and *redaction*.

Password Security

You can limit access to a PDF by setting passwords and restricting certain features such as printing and editing. To quickly encrypt and password-protect a PDF, open the document and complete these steps.

Select the **Protect** toolbar and choose **Encrypt**, followed by **Encrypt with Password**, to open the dialog pictured in **Figure 31**. Alternatively, you can select **File** and **Properties** from the menu. Next, click the **Security** tab in the **Document Properties** dialog box and choose **Password Security** from the **Security Method** drop-down list.

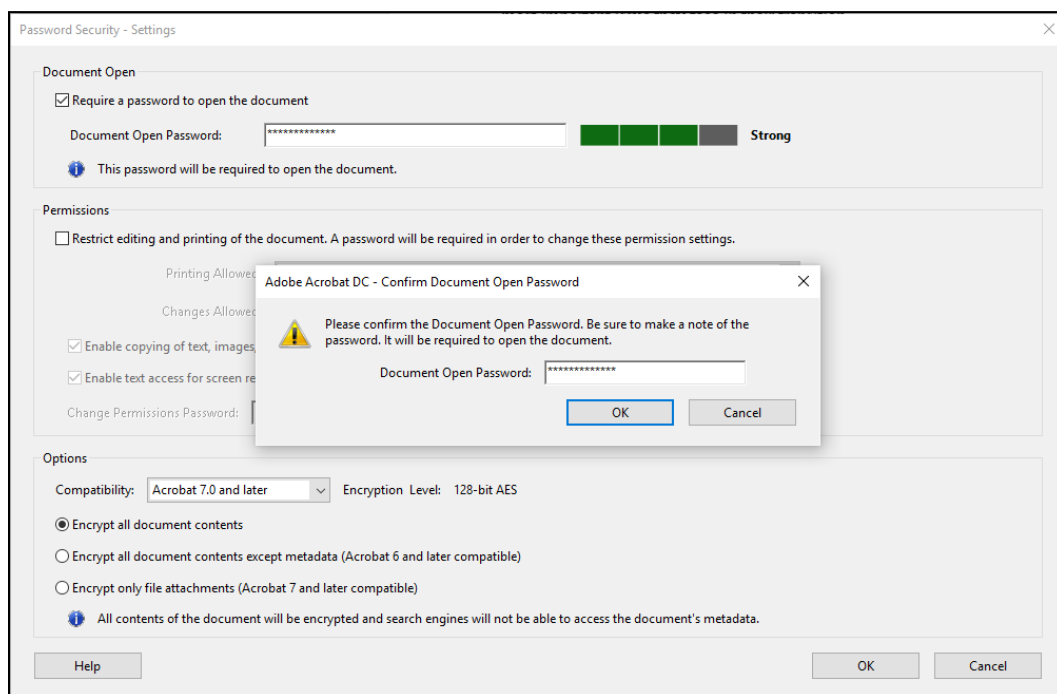


Figure 31 – Password Security – Settings

To set password security, complete the following steps.

- a. Configure the desired settings in the **Password Security – Settings** dialog box to encrypt and secure the document. Then click the appropriate radio button to **Select Document Components to Encrypt – All document contents, All document contents except metadata, or Only file attachments**.

A document's metadata is also encrypted when all document contents are encrypted. If metadata searches are essential, encrypt all content except the metadata. A PDF can be a security "wrapper" for other files, hence the ability to secure only file attachments.

- b. To require a password to open the document, check the box labeled **Require a password to open the document** and enter a strong **Document Open Password**. This option is unavailable if **Encrypt Only File Attachments** is selected.
- c. Select the security **Compatibility** level. Acrobat XI and newer uses 256-bit AES to encrypt documents. Acrobat VII and VIII use 128-bit AES. Note that individuals using an earlier version of Acrobat cannot open a PDF document with a compatibility setting for a later version. For example, if Acrobat XI settings are applied, others using Acrobat VII or VIII cannot open the document.

If restricted permissions are not required, click **OK** to end the process. The new security settings are not applied until you save the file.

- d. To require a password to change the permissions on a document, check the box labeled **Restrict editing and printing of the document**. Then type a strong password.



The Document Open Password and the Change Permissions Password must be different. If you secure a PDF with both types of passwords, it can be opened with either password. However, only the permissions password allows users to change the restricted features.

- e. Select **Printing Allowed** from the drop-down list. The choices are **None, Low Resolutions (150 dpi), and High Resolution**.
- f. Select **Changes Allowed** from the drop-down list. The choices follow.
 - i. **None** – Users cannot change the document.
 - ii. **Inserting, Deleting, and Rotating Pages** – Users can insert, delete, and rotate pages and create bookmarks and thumbnails.

- iii. **Filling in Form Fields and Signing Existing Signature Fields** –Users can fill in forms and add digital signatures but cannot add comments.
- iv. **Commenting, Filling in Form Fields, and Signing Existing Signature Fields** – Users can fill in forms, add digital signatures, and add comments but cannot move pages.
- g. To allow users to select and copy document contents to another document or application, check **Enable copying of text, images, and other content**.
- h. To allow visually impaired users to read the document with screen readers, check the **Enable text access for screen reader devices for the visually impaired** box.
- i. Click **OK** and confirm the passwords to end the process. The new security settings do not go into effect until you save the document. To maintain an unprotected version of the document, save the file with a different file name.

To review the security settings for a document, select **File, Properties** from the menu and then click the **Security** tab in the **Document Properties** dialog box. Alternatively, you can choose **Tools, Protection, More Protection**, and **Security Properties**. For information on the encryption level set, click **Show Details**, as shown in **Figure 32**.

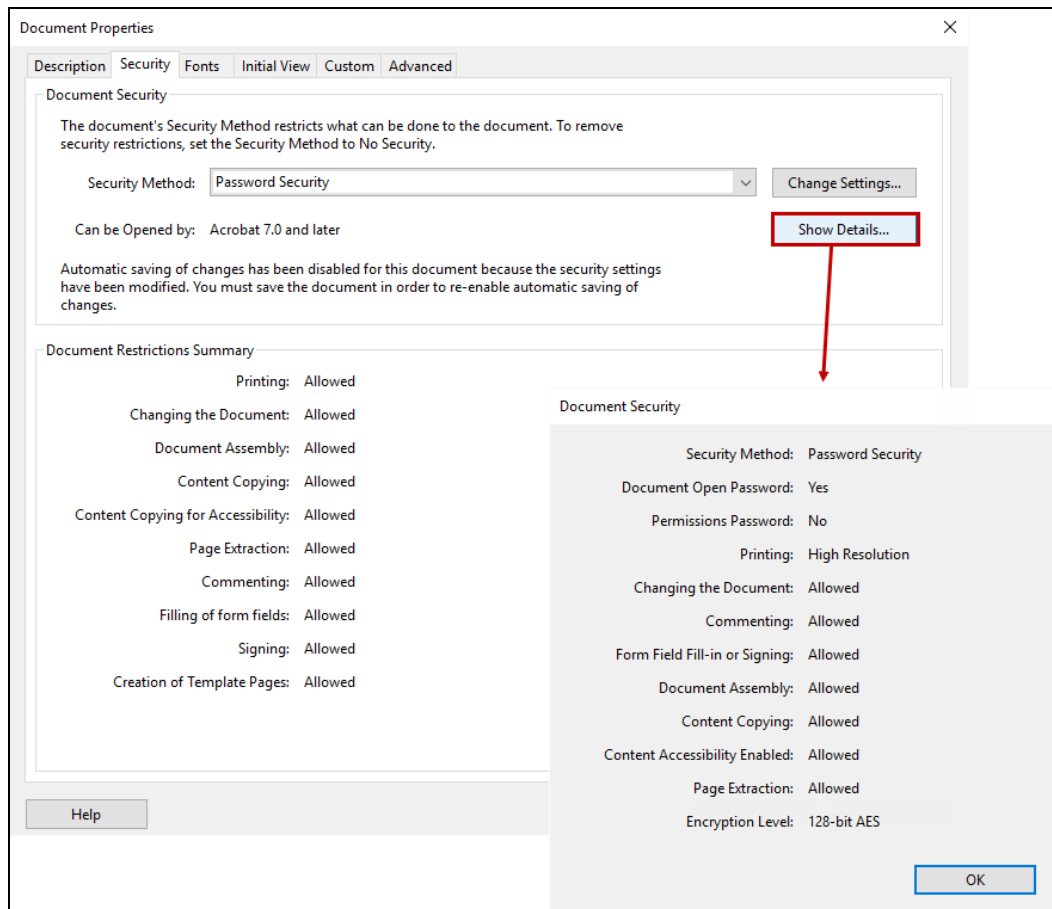


Figure 32 – Reviewing Document Security Settings

Redacting PDFs

You can use the **Redaction Tool** in Acrobat Pro to remove sensitive information from a document. For example, suppose a client requested that her W-2 be forwarded to a bank to support a loan application. In that case, users could redact the client's Social Security Number from the document before sending it. The Redaction Tool is available by choosing **Redaction** from the gallery of options available upon clicking **Tools**. Redaction is a two-step process. The data to redact is first marked, and then redaction is applied.

To redact selected data passages, choose **Mark for Redaction** and select the text, images, or pages you wish to censor. After you select each desired object, click **Apply** to complete the process of removing the sensitive data from the document.

Acrobat also allows users to search and redact a document of specified information. In a preceding example, a client requested that a firm forward her W-2 to a bank. In such a case, censoring the single instance of her Social Security Number would be relatively easy before sending the document. If, on the other hand, the client requested that her entire tax return be communicated to a bank, manually redacting her Social Security Number from the tax return

could be a cumbersome and time-consuming task. Instead, select **Find Text** to open the **Search** dialog box pictured in **Figure 33**. Indicate the word, words, or patterns of text you would like to redact and then choose **Search & Remove Text**. Note that redaction permanently removes data from a PDF document. Once redaction is applied, Acrobat will prompt you to save the redacted document with a different name to avoid overwriting the original document.

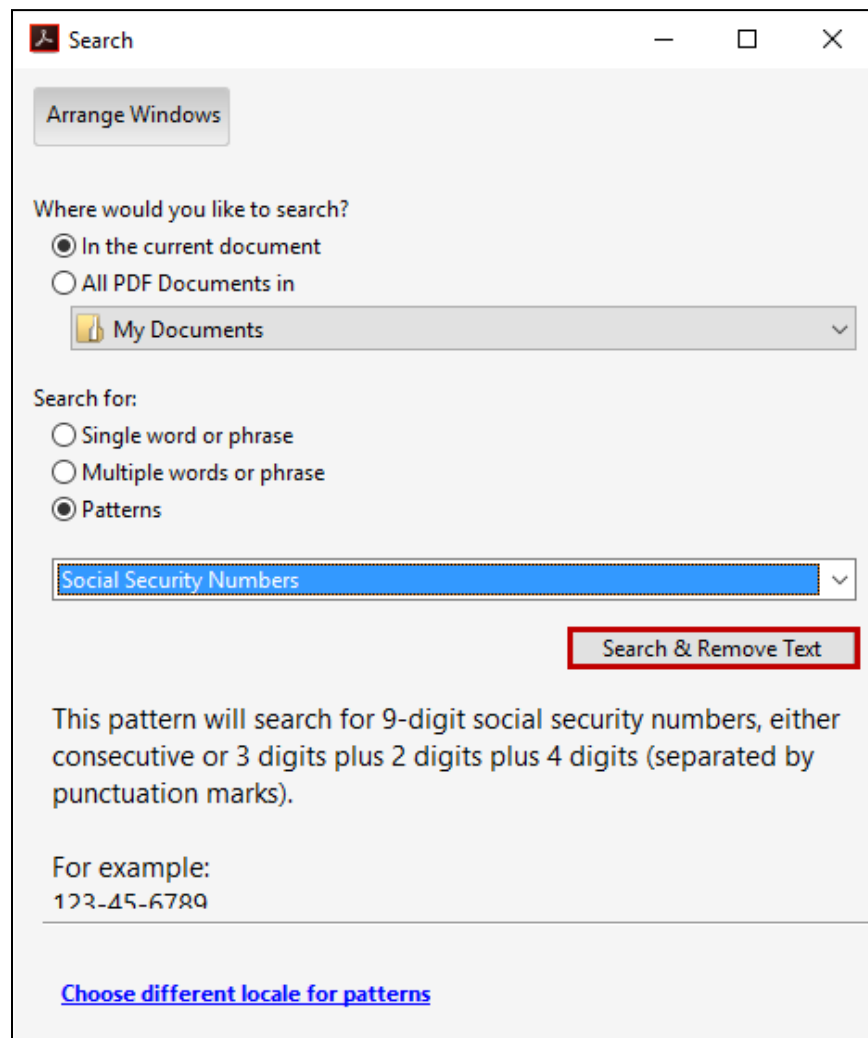


Figure 33 – Accessing the Redaction Tools from the Menu

PDFs And Electronic Signatures

The previously described process discussed adding a proxy for a handwritten signature to a document. Understand that such a signature is not an *electronic signature*, at least not in the legal sense of the term. An actual, secure electronic signature is legally binding in most developed countries, including the United States and Canada. Acrobat Standard and Acrobat Pro facilitate collecting electronic signatures on documents such as contracts and proposals.

To send a document for an electronic signature, open the document in Acrobat Standard or Acrobat Pro and click **Send for Signature**, as shown in **Figure 18**.

Form 8879 | **IRS e-file Signature Authorization** | OMB No. 1545-0074 | **2015**

Department of the Treasury | Internal Revenue Service | ▶ Do not send to the IRS. This is not a tax return. ▶ Keep this form for your records. ▶ Information about Form 8879 and its instructions is at www.irs.gov/form8879.

Submission Identification Number (SID) ▶ 123456789123456789

Taxpayer's name: Frank Smith | Social security number: 999999999
 Spouse's name: Helene Smith | Spouse's social security number: 888888888

Part I Tax Return Information—Tax Year Ending December 31, 2015 (Whole Dollars Only)

1	Adjusted gross income (Form 1040, line 38; Form 1040A, line 22; Form 1040EZ, line 4)	150000
2	Total tax (Form 1040, line 63; Form 1040A, line 39; Form 1040EZ, line 12)	18000
3	Federal income tax withheld (Form 1040, line 64; Form 1040A, line 40; Form 1040EZ, line 7)	17000
4	Refund (Form 1040, line 76a; Form 1040A, line 48a; Form 1040EZ, line 13a; Form 1040-SS, Part I, line 13a)	0
5	Amount you owe (Form 1040, line 78; Form 1040A, line 50; Form 1040EZ, line 14)	1000

Part II Taxpayer Declaration and Signature Authorization (Be sure you get and keep a copy of your return)

Under penalties of perjury, I declare that I have examined a copy of my electronic individual income tax return and accompanying schedules and statements for the tax year ending December 31, 2015, and to the best of my knowledge and belief, it is true, correct, and complete. I further declare that the amounts in Part I above are the amounts from my electronic income tax return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send my return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

☒ I authorize Luca Pacioli to enter or generate my PIN 1 1 1 1 1 1
 as my signature on my tax year 2015 electronically filed income tax return.
☐ I will enter my PIN as my signature on my tax year 2015 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature ▶ Date ▶

Spouse's PIN: check one box only

☒ I authorize Luca Pacioli to enter or generate my PIN 2 2 2 2 2 2
 as my signature on my tax year 2015 electronically filed income tax return.
☐ I will enter my PIN as my signature on my tax year 2015 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature ▶ Date ▶

Right-hand side (Adobe Acrobat toolbar):

- Search Tools...
- Create PDF
- Edit PDF
- Export PDF
- Comment
- Organize Pages
- Enhance Scans
- Protect
- Fill & Sign
- Prepare Form
- Send for Signature** (highlighted in red)
- Send & Track
- Combine Files
- Your current plan is Creative Cloud
- Learn More

Figure 34 – Sending a PDF Document for Electronic Signatures

In the following dialog box, click **Prepare Form** to add information and signature fields to the form as necessary. In many cases, Acrobat will recognize various fields – including signature fields –and will automatically convert them to fillable fields. In these cases, you should delete any unnecessary fields and modify the names of fields that Acrobat creates. You can do this in the task pane on the right side of the window in **Figure 35**.²

² Use of Form 8879 is for illustrative purposes only. Practitioners should independently determine whether electronic signatures applied using the methodology described meets IRS requirements.

Form 8879 For Electronic Signature.pdf - Adobe Acrobat Pro DC

File Edit View Window Help

Home Tools Form 8879 For Elec...

1 / 1 113%

Prepare Form

reason for any delay in processing the return or refund, and (g) the date or any refund, if applicable, I authorize the U.S. Treasury and the designated financial institution to initiate an ACH electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of my federal taxes owed on this return and/or a payment of estimated tax, and the financial institution to debit the entry to this account. This authorization is to remain in full force and effect until I notify the U.S. Treasury Financial Agent to terminate the authorization. To revoke (cancel) a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537. Payment cancellation requests must be received no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I further acknowledge that the personal identification number (PIN) below is my signature for my electronic income tax return and, if applicable, my Electronic Funds Withdrawal Consent.

Taxpayer's PIN: check one box only

☒ I authorize Luca Pacioli to enter or generate my PIN
ERO firm name Enter five digits, but do not enter all zeros

as my signature on my tax year 2015 electronically filed income tax return.

☐ I will enter my PIN as my signature on my tax year 2015 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Your signature Date

Spouse's PIN: check one box only

☒ I authorize Luca Pacioli to enter or generate my PIN
ERO firm name Enter five digits, but do not enter all zeros

as my signature on my tax year 2015 electronically filed income tax return.

☐ I will enter my PIN as my signature on my tax year 2015 electronically filed income tax return. Check this box only if you are entering your own PIN and your return is filed using the Practitioner PIN method. The ERO must complete Part III below.

Spouse's signature Date

Practitioner PIN Method Returns Only—continue below

Part III Certification and Authentication—Practitioner PIN Method Only

ERO's EFIN/PIN. Enter your six-digit EFIN followed by your five-digit self-selected PIN.
Do not enter all zeros

I certify that the above numeric entry is my PIN, which is my signature for the tax year 2015 electronically filed income tax return for the taxpayer(s) indicated above. I confirm that I am submitting this return in accordance with the requirements of the Practitioner PIN method and Publication 1345, Handbook for Authorized IRS e-file Providers of Individual Income Tax Returns.

ERO's signature Date

ALIGN CENTER

MATCH SIZE DISTRIBUTE

More

FIELDS

Page 1

Your Signature

Date

Spouse Signature

Date_2

Send for Signature

Figure 35 – Editing Signature Fields in Acrobat

When ready to send the form to the intended signer(s), click the **Send for Signature** button and click **Ready to Send**. Then, in the resulting **Send for Signature** dialog box, enter the email addresses of those who should sign the form along with an **Agreement Name** and a **Message**. Each recipient receives a message like the one pictured in **Figure 36** requesting a signature on the form.

Tommy Stephens Has Sent You Form 8879 For Electronic Signature to Sign

Tommy Stephens (TOMMY@K2E.COM) says:
 "Please review and sign Form 8879 For Electronic Signature."

[Click here to review and sign Form 8879 For Electronic Signature.](#)

After you sign Form 8879 For Electronic Signature, the agreement will be sent to demo@k2e.com. Then, all parties will receive a final PDF copy by email.

Do you need to forward this to a party authorized to sign it? [Click here](#)

To ensure that you continue receiving our emails, please add echosign@echosign.com to your address book or safe list.

Figure 36 – Message Received by Those from Whom a Signature is Requested

As each signatory signs the form, Adobe updates the document's status in the Document Cloud. You can check the document's status by clicking **Home**, **Sent**, and **Manage Documents Sent for Signature**.

Summary

PDF files are much more than meets the eye! Yes, they preserve the integrity of documents and facilitate sharing of documents across a variety of platforms. But, equally important, if not more so, PDFs provide document editing, collaboration, and data management options to business professionals. Therefore, now is the time to take another look at PDFs to ensure you leverage this technology to solve some of your data and information issues.