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Introduction

Three Rules of this Seminar

1. **There Are No Dumb Questions.** Please ask questions if you need further explanation. We welcome your questions and will do our best to provide accurate and meaningful answers.
2. **Obtain the Information for Which You Came.** If you have a specific interest in a topic, please let us know. If your topic is not part of the course materials, we will do our best to accommodate your request. Your instructor is anxious to meet your needs.
3. **Share and Share-Alike.** Your instructor is here to share relevant information about the course. We hope that you will be willing to do the same. If you have helpful tips or experiences, please share them with the other participants and us.

Course Development

The shareholders, associates, and staff of K2 Enterprises and K2E Canada Inc. developed this course and the related course materials. We aim to deliver high-quality educational practices that help you use and understand the tools and concepts discussed in this session more effectively.

We designed our course presentation style for busy professionals. Through numerous short case studies and feature reviews, we deliver concise, easy-to-understand, easy-to-absorb information.

To maximize your time and the value of attending this course, we have carefully filtered out trivial and obscure features. Our goal is not to cover every keystroke and menu option, but to provide a fast-paced course that focuses on state-of-the-art information technology and how it can benefit you and your staff.

About K2 Enterprises

For over three decades, our team members have delivered more than 45,000 technology-focused seminars, webinars, and conferences worldwide. To stay on top of technology, our team members read numerous technology trade magazines, attend conferences, and speak with technology companies each year to stay current with the latest information for our courses. Also, we experience everything we teach and recommend to our audiences. Because our shareholders and associates are based in different states and provinces, using technology efficiently and appropriately is essential to our business's success and survival.

Our Mission Statement

K2 aims to develop and deliver the highest-quality technology seminars and conferences for business professionals. We work cooperatively with professional organizations such as state CPA societies, associations of Chartered Professional Accountants, and technology vendors. We make every effort to maintain high integrity, family values, and friendship among all involved.

Our Instructional Team

For a complete listing of instructors and bios, please visit:

K2 Enterprises

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The K2 Seminar Curriculum

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- K2's Excel PivotTables For Accountants
- K2's Excel Tips, Tricks, And Techniques For Accountants
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- K2's Better Productivity Through Artificial Intelligence and Automation Tools
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- K2's Data Analytics For Accountants And Auditors
- K2's Ethics And Technology
- K2's Excel Charting And Visualizations
- K2's Implementing Internal Controls In QuickBooks Online Environments
- K2's Improving Productivity With Microsoft 365Cloud Applications And Services
- K2's Mastering Advanced Excel Functions
- K2's Microsoft Teams
- K2's Securing Your Data: Practical Tools For Protecting Information
- K2's Technology Update
- K2's Top PDF Features You Should Know

Besides the seminars listed above, K2 also produces numerous one and two-day technology conferences annually. You can find a complete listing of our course offerings, including dates, locations, and course descriptions, on our website at:

K2 Enterprises

[Technology Conference - K2 Enterprises](#)



K2E Canada Inc.

[Technology Conference - K2E Canada Inc.](#)



On-Site Training

Working cooperatively with state CPA organizations and associations of Chartered Professional Accountants, we are pleased to offer all our seminars and conference sessions as on-site training opportunities. On-site training provides companies of all sizes with numerous advantages, including the following.

- **Customization.** K2 can customize the content of all on-site training events to meet your organization's specific needs. For example, we can combine selected parts of existing courses into a focused learning experience to meet your team's needs. Likewise, we can develop custom content from the ground up and deliver it to your team members, ensuring we meet your training objectives.
- **Cost savings.** For organizations of all sizes, on-site training can provide significant cost savings compared to public training venues. In addition to potentially reduced registration fees, these cost savings materialize in the form of reduced travel costs and reducing the amount of time team members spend away from the office.
- **Convenience.** Because you select your on-site training event's date, time, and location, on-site training is more convenient for you and your team than traditional training options. Many organizations schedule on-site training with staff meetings, retreats, and customer/client events to leverage the value of all participants' time.

Customization, cost savings, and convenience are the three C's of "training to go." For more information on how you and your organization can experience these benefits or schedule an on-site training event, please visit:

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[On-site Training - K2 Enterprises](#)

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Web-Based Training

K2 offers web-based CPE and CPD to accounting and business professionals throughout the United States and Canada. K2's award-winning instructors deliver two-, four-, and eight-hour webinars on numerous technology-focused topics.

Additionally, K2 provides on-demand training. On-demand courses offer you the advantage of receiving top-quality training at a time and location that fits your busy schedule. You can start a class today and complete it in the future. For more information, please visit:

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K2 Internet Sites

K2 maintains multiple websites containing information and links relevant to CPAs and other business professionals as a service to the profession. Further, the content of these sites can enrich your experience during and after our seminars. In addition, our pages contain links to some of the top accounting and content management software solutions and even to a few sites that are just fun places to visit. If you have any comments or questions regarding our web pages, please email webmaster@k2e.com.

K2 has two primary websites. You can view information regarding CPE and CPD opportunities, access a library of technology tips and articles, and link to K2-related websites.

www.k2e.com



www.k2e.ca



www.cpafirmtech.com

CPA Firm Technology contains technology-related information explicitly targeted at public accounting firms. We include product reviews, hardware and operating system discussions, affinity programs for CPA firms, and Cloud computing resources.



www.accountingsoftwareworld.com

Accounting Software World provides information related to accounting and financial management solutions. Here, you can find software and service reviews, product comparisons, white papers, and other material of interest to those seeking information about accounting software and service solutions.



www.totallypaperless.com

For information about document management and paperless processes, please visit **Totally Paperless**. In addition, you will find reviews on hardware and software used by all types of businesses in document imaging and management processes.



Introducing PDFs

Chapter

1

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, including 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 identically regardless of its origin or destination.

Upon completing this chapter, you should be able to:

- Describe the PDF format and list some of the advantages of working with PDFs;
- Distinguish between the offerings in the Acrobat software line;
- List the primary versions of Adobe Acrobat and differentiate between the feature set offered by each;
- Identify new features in Acrobat, including sending and tracking documents online and collecting e-signatures on PDFs;
- Work inside the redesigned user interface found in Acrobat;
- Identify collaboration options when working with PDFs while using Acrobat's Cloud options; and
- Manage and manipulate PDFs with Acrobat on mobile devices and tablets.

Why Use PDFs?

PDF documents satisfy several business objectives.

- PDF documents provide a means for archiving digital records, which 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 reviews or modifications over time.
- Users can easily transport PDF documents for use in a collaborative environment.
- 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 in accounting and finance, because they offer unparalleled portability. In addition, PDFs are platform, operating system, and application-independent.

Introducing Adobe Acrobat

While numerous applications are available for working with PDF documents, Adobe Acrobat is the industry-leading solution for creating, manipulating, editing, and securing PDFs. However, to take full advantage of all Acrobat offers, you must understand these differences and how to put them to work. In this session, you will learn about these significant changes for PDFs.

Acquiring Acrobat – Should You Purchase Your License or Subscribe?

The licensing model is one of the first things you should understand about Adobe Acrobat. Historically, Adobe offered paid versions of Acrobat as *subscription* and *perpetual* licenses. This licensing model followed a general trend in the software industry: transitioning consumers from one-time software purchases to subscription-based licensing. Potential advantages for consumers using subscription licensing include predictable expenditures, automatic upgrades, and additional features and services. Most recent purchasers of Adobe Acrobat licenses have chosen to acquire *subscription* licenses for the reasons named above. In fact, effective May 31, 2025, Adobe no longer sells any new perpetual licenses. Therefore, all future licensees must acquire subscription licenses. Further, Adobe ended all technical support, updates, security patches, and related services for existing perpetual licensees as of November 30, 2025.

With subscription licenses of Acrobat Standard or Pro, pricing varies based on whether you choose a subscription to Acrobat Standard or Acrobat Pro. Also, whether you choose a monthly or annual commitment impacts the price of your subscription. **Table 1** summarizes the monthly payment required under each scenario for common subscriptions.

	Monthly Price Without An Annual Commitment	Monthly Price With An Annual Commitment
Acrobat Standard	\$22.99/month US	\$12.99/month US
Acrobat Pro	\$29.99/month US	\$19.99/month US

Table 1 – Subscription Pricing for Adobe Acrobat Standard And Pro

Given the myriad licensing options, a complete discussion of all options, features, capabilities, and prices is beyond the scope of this session. However, for details on this subject, visit <https://www.adobe.com/acrobat/pricing.html>.

Do You Want Cloud with Your License?

The subscription versions of Acrobat provide access to Adobe’s “Document Cloud.” The Document Cloud includes several Cloud-based tools as part of the subscription price, including the following.

- Working on the go with the Acrobat Reader mobile app
- Sending documents for signature
- E-signing any document
- Accessing Acrobat through any browser using Document Cloud services
- Automatic updates/upgrades as they become available at no additional charge

To illustrate, if you have a Cloud-enabled subscription, upon logging in to your account, the **Document Cloud** presents the window pictured in **Figure 1**. A close inspection of that window reveals that you can access fundamental PDF tools in the Cloud, as well as tools for managing electronic signatures.

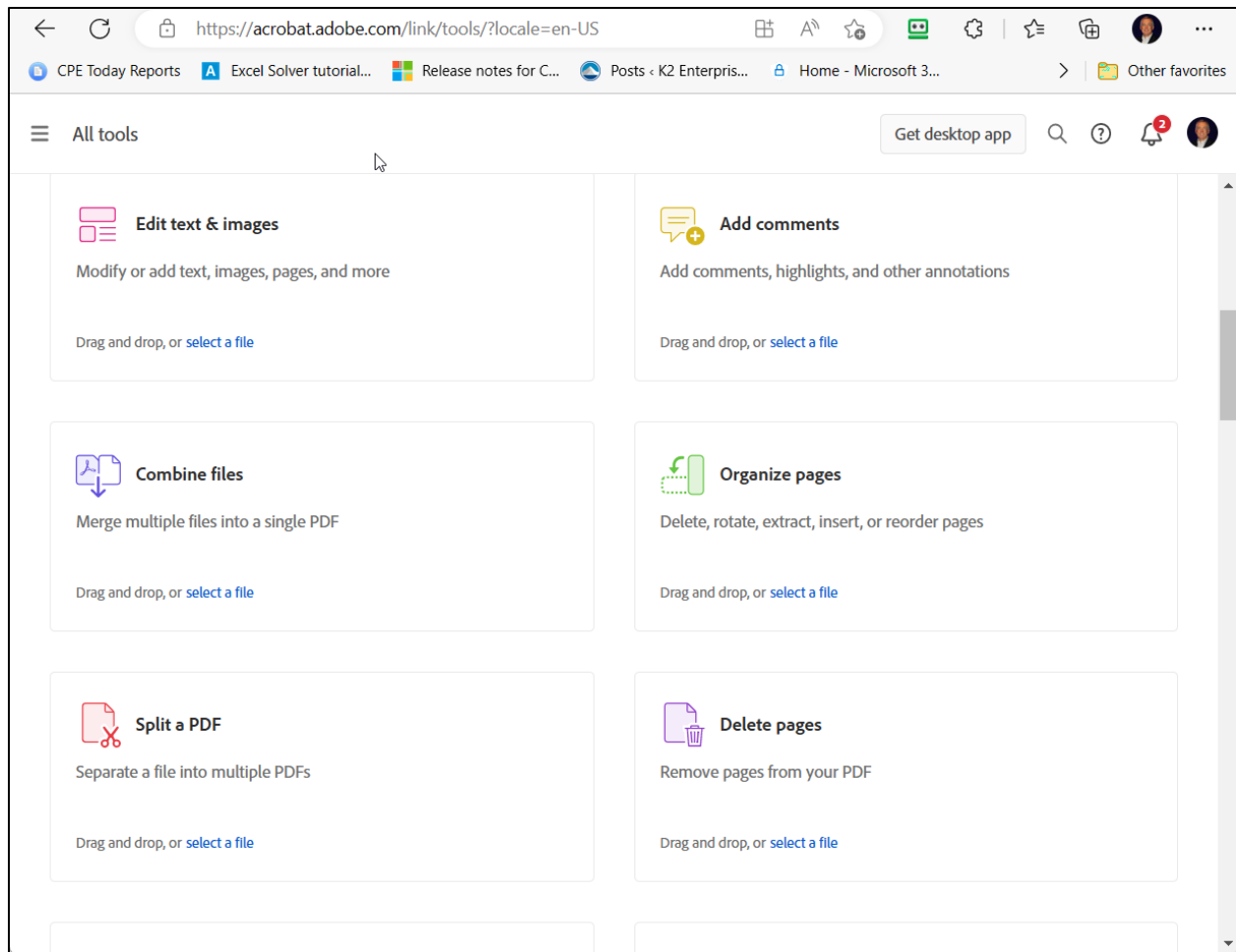


Figure 1 – Adobe Document Cloud User Interface

You can apply most of the functionality accessible in the Document Cloud to documents stored in the Cloud or locally. For example, clicking **Organize Pages** followed by **Select File to Organize** opens the window pictured in **Figure 2**. Notice the options to work on local documents or documents stored in the Document Cloud.

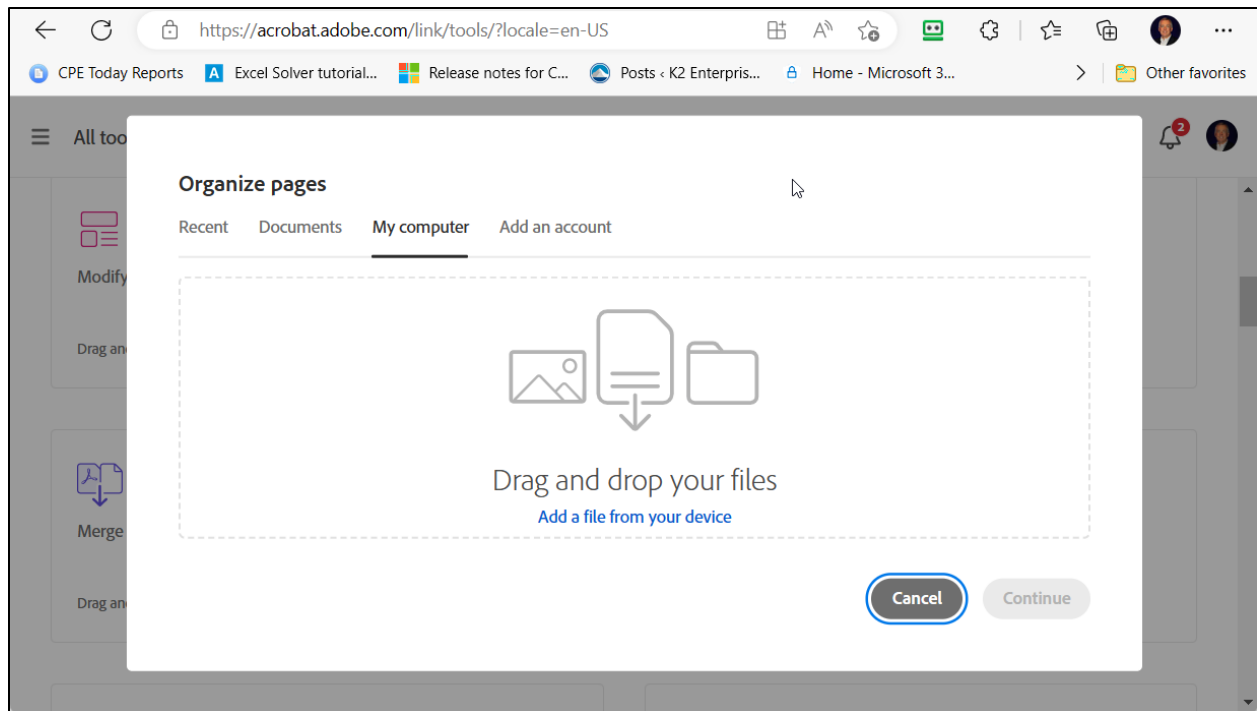


Figure 2 – Choosing between Desktop and Cloud-based Documents in Document Cloud



At this point, it is probably worthwhile to point out that there is ***no mandate*** from Adobe that you store data in the Document Cloud. Instead, it is just another option that is available to you. Those who might find this scenario attractive include business professionals who primarily work from mobile devices and seek more functionality than the Acrobat app offers.

Which Version of Acrobat is Right for You?

As with prior editions of Acrobat, Adobe offers Acrobat in three versions: 1) **Acrobat Reader**, 2) **Acrobat Standard**, and 3) **Acrobat Pro**. Further, Adobe supports each tool on Windows and macOS.

Acrobat Reader

Acrobat Reader is Adobe's free PDF reader and annotation tool that allows you to open and edit PDFs on your computer or mobile device. If you have recently purchased a new computer, Acrobat Reader may already be installed on it. If not, you can download it from the Adobe website by visiting <https://www.adobe.com/acrobat/pdf-reader.html>.

New features in Reader that make it more attractive than prior versions include more robust editing tools that allow you to add annotations to documents easily. Reader enables you to perform the following edits and annotations on your PDFs regardless of what you use.

- Viewing PDFs
- Printing PDFs
- Sharing and commenting on PDFs

Additionally, Acrobat Reader makes it easy to quickly locate recently used PDFs across all your devices. This feature should be handy for those who open PDFs on multiple devices.

Acrobat Standard

Acrobat Standard goes beyond Acrobat Reader in several areas; the following is a partial list of the differences between Acrobat Reader and Acrobat Standard. With Acrobat Standard, you can access robust capabilities for creating PDF documents, including converting existing files and images to PDFs, combining multiple PDFs, and creating PDFs from Microsoft Office documents. You can also scan documents to searchable PDFs, add security to PDF documents, create fillable PDF forms, and collect electronic signatures from others if you are using a subscription-based license to Acrobat Standard.

Acrobat Standard is a suitable choice for those who require basic to intermediate PDF functionality, including many accountants and other information workers who tend to focus on tasks for which they are responsible. In other words, Acrobat Standard is a good choice for those who do not need to facilitate other team members' actions when working with PDF documents.

Acrobat Pro

Acrobat Pro is the premium offering in the Acrobat family of tools. With Acrobat Pro, you obtain all of the functionality available in Acrobat Reader and Acrobat Standard. In addition, Acrobat Pro adds several advanced features that make it the optimal choice in many circumstances.

Distinguishing features of Acrobat Pro include the following.

- Converting and validating PDFs for compliance with PDF/A and PDF/X standards
- Creating PDFs that are accessible to those with disabilities
- Adding audio, video, and other objects to PDFs
- Indexing PDF documents to speed searches of text
- Redacting sensitive information from PDF documents permanently

- Comparing two PDF documents for differences
- Optimizing PDFs to reduce the file size

Of note, given the relatively small differential in pricing between Acrobat Standard and Acrobat Pro, many users will probably conclude that Acrobat Pro is a superior value and opt for it when subscribing.

A Note on Microsoft Office Integration

Acrobat continues to provide deep integration with Microsoft Office. The ability to “print” a document through an Adobe print driver to create a PDF is one such example. Another supported integration is the PDF Maker add-in. Additional integration points between Acrobat and Microsoft Office (Windows) are listed below.

- Creating PDFs from the Acrobat tab of the Ribbon in Word, Excel, PowerPoint, and Outlook
- Adding protection to PDFs created from the Acrobat tab of the Ribbon in Microsoft Office applications to restrict others from copying or editing sensitive content
- Using the Acrobat tab of the Ribbon in Word, Excel, or PowerPoint to execute many steps at once
- Using the Send & Track plug-in for Microsoft Outlook to send files of virtually any size to others and set tracking options to get notified when recipients view your file (This feature requires a subscription to Acrobat.)
- Importing comments from a PDF file into the source Word document as markups that you can accept or reject with the Microsoft Word Track Changes tool
- Simplifying email search and retrieval by archiving emails or email folders from Microsoft Outlook

Acrobat Provides A Browser-Like User Interface

Acrobat provides a browser-like interface, differentiating it from older editions, as shown in **Figure 3**.

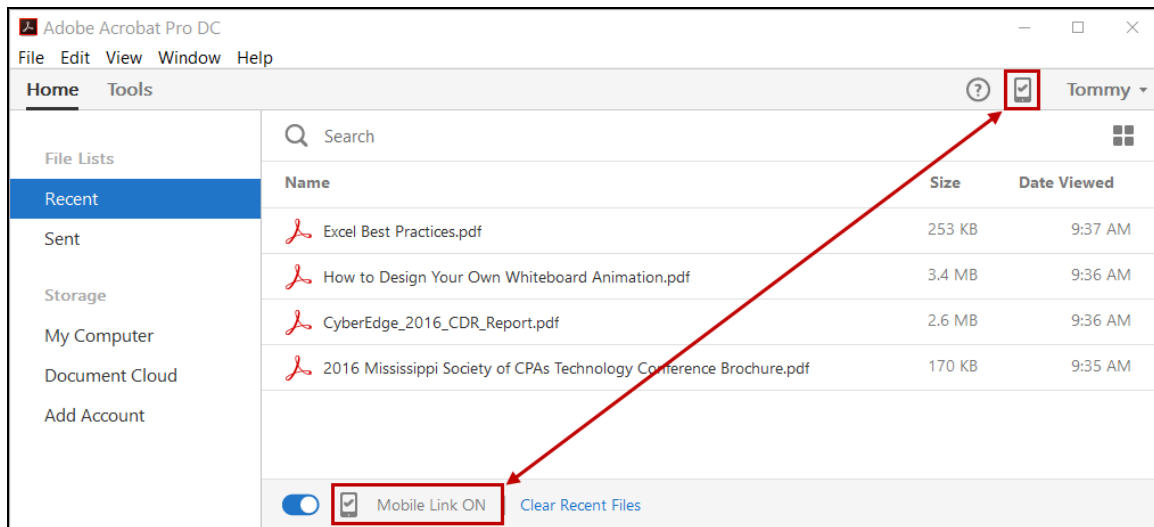


Figure 3 – Browser-like Interface in Acrobat

As you open documents in Acrobat, each document opens in a separate “tear off” tab, allowing you to drag and drop to reposition PDFs in different windows on your monitor(s) in the best configuration for you. Further, if you tear off a tab, you can later drag and drop it back onto the tab strip so that all documents are visible in the same window of Acrobat, as shown in **Figure 4**.

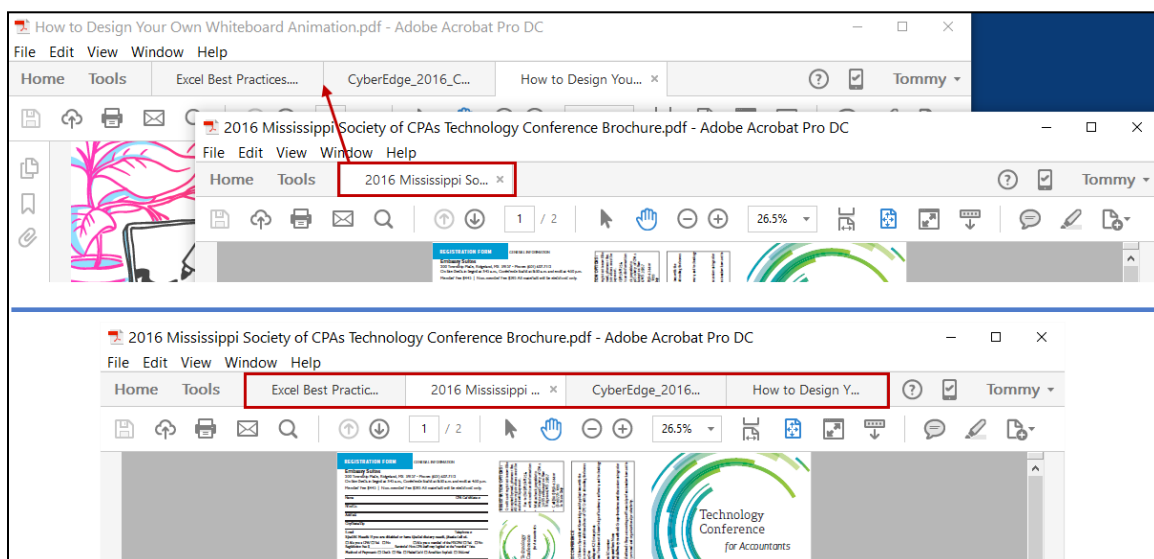


Figure 4 – Recombining Documents into the Same Acrobat Window

The user interface differences in Acrobat extend beyond just the browser-like environment. In addition, how you access Acrobat features is different. Clicking the **Tools** tab opens the window shown in **Figure 5**, which provides shortcuts to access much of the functionality available in Acrobat. (We display only a portion of the entire window for presentation purposes.) You can access various shortcuts in the window's primary section, grouped by categories, such as *Create & Edit* and *Review & Approve*. You can customize the appearance of shortcuts in this window and

remove those you anticipate you'll rarely use. To do so, click the drop-down arrow under any icons, then choose **Remove Shortcut**.

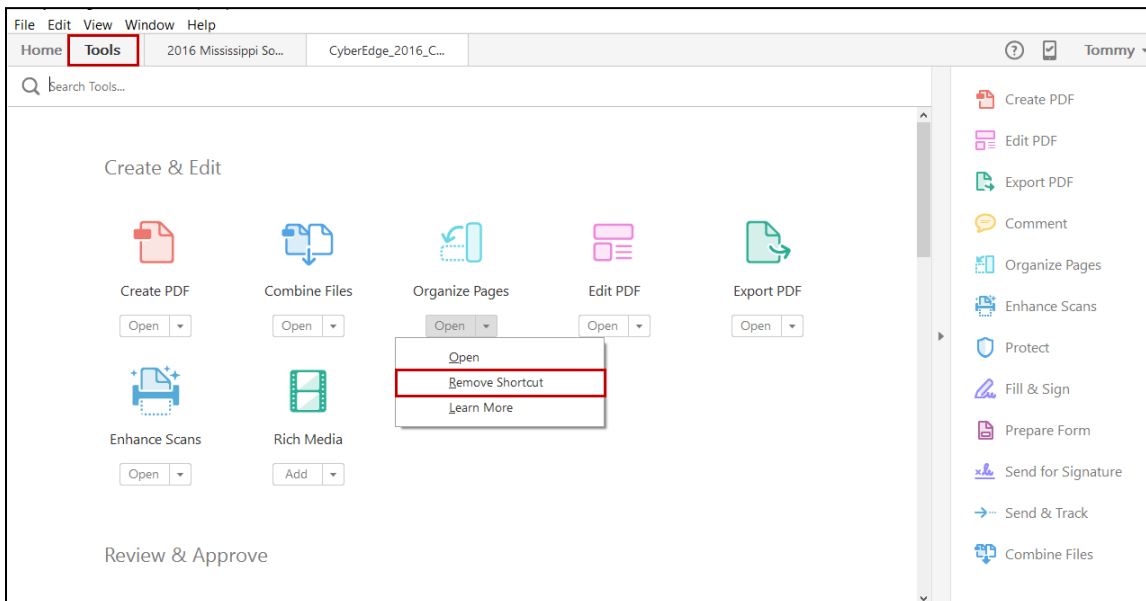


Figure 5 – Accessing and Customizing Acrobat’s Functionality from the Tools Tab

When you choose **Open** to work with a set of tools, the window switches to an optimal view for working with the selected features. In addition, Acrobat inserts a toolbar into that window unique to your chosen set of tools. For example, choosing to open the **Organize Pages** set of tools causes the user interface to change to that pictured in **Figure 6**. In particular, notice the **Organize Pages** toolbar that Acrobat added to the user interface and how Acrobat optimized the view in the main window to use the tools available in Organize Pages.

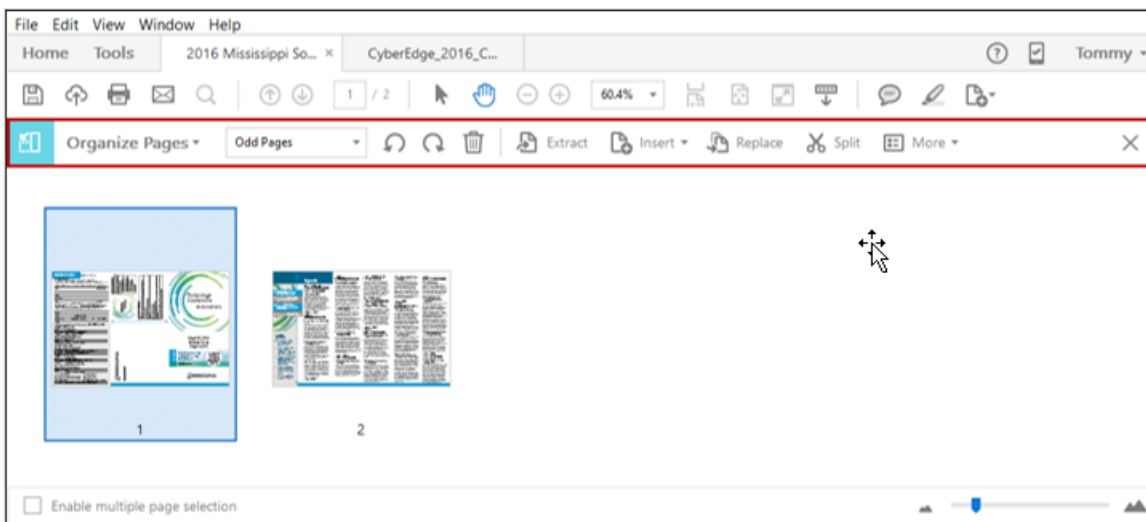


Figure 6 – Working with Acrobat’s Organize Pages Tools

You can also access much of Acrobat's functionality by clicking on the options in the **Tools Pane** on the right side of the window pictured in Figure 5. For instance, as shown in **Figure 7**. Clicking Create PDF in the Tools Pane opens a set of tools to help you create a PDF document.



In addition to accessing various tools and features through the updated user interface, you can continue to use many of the same methods for accessing tools in the newer editions of Acrobat as you used in prior editions. For example, the **File**, **Edit**, and **View** menus in Acrobat all provide access to many of the same features accessible via the techniques above.

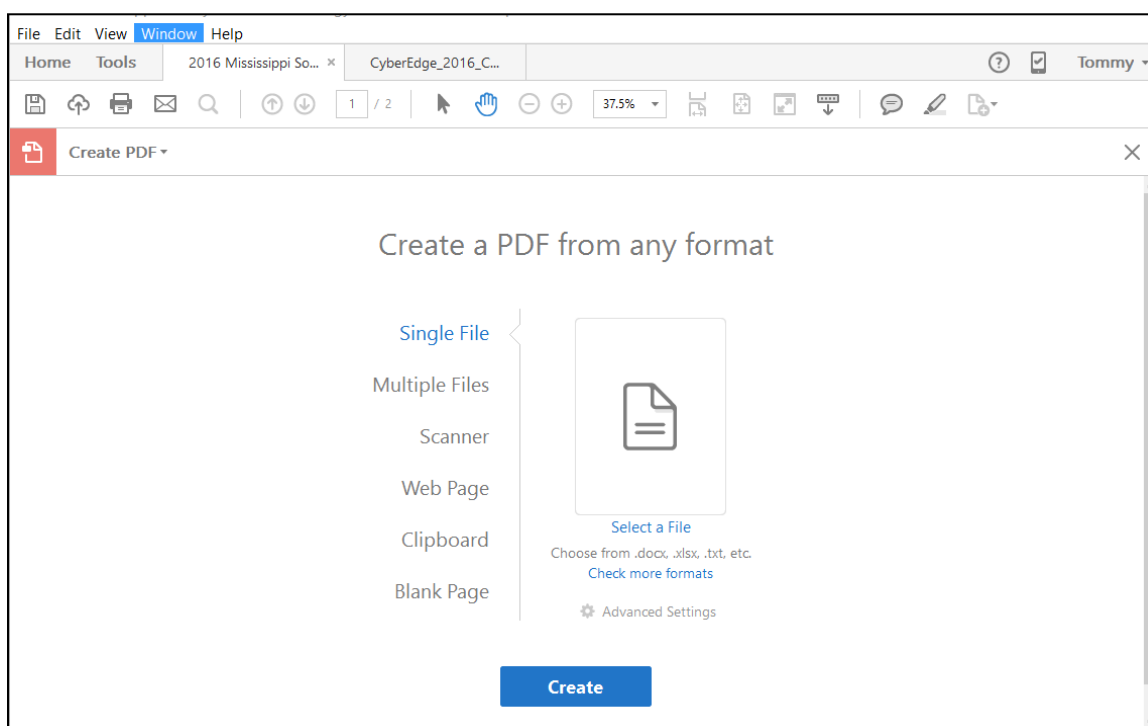


Figure 7 – Access Create PDF Tools from the Tools Pane

Customizing the User Interface for Ease of Use and Maximum Efficiency

In addition to the customization options discussed previously, you can customize your user interface to help you work as efficiently as possible. For example, when working with a document in Acrobat, you will notice a toolbar positioned immediately above the document. Realistically, it is not a single toolbar but a collection of toolbars you can customize to provide quick access to the features you need most often. The toolbars available for display in this space are **File**, **Edit**, **Page Navigation**, **Page Display**, **Select & Zoom**, and **Quick Tools**. In your instance of Acrobat, these toolbars may resemble the one pictured in **Figure 8**.



Figure 8 – Default Combination of Toolbars in Acrobat

To customize the toolbars pictured in Figure 8, right-click on any toolbar and choose **Show <<toolbar name>> Tools**. Then, select or deselect the available items until the items on that toolbar meet your needs. Customizing Quick Tools is slightly different. After right-clicking on the toolbar, choose **Customize Quick Tools**. Then select the items you want to include or remove from Quick Tools.

Acrobat Offers New Features to Consider

In addition to the broad changes outlined above that address licensing, user interface, and Cloud services, Acrobat offers features that reflect the changes impacting today's information workers and the ever-increasing usage of mobile devices. The following are five relatively new Acrobat features you should consider using.

Get More Work Done on Touch-enabled Devices

iPad, iPhone, and Android users can use additional functionality in each platform's free **Acrobat Reader** app. To illustrate, you can organize pages on your mobile device equipped with Acrobat Reader, including reordering, deleting, and rotating them. To access this feature, click **Organize Pages** to open the Organize Pages window shown in **Figure 9**. Then tap-and-drag to rearrange the pages as necessary or tap the icons near the bottom of the window to rotate or delete selected pages.

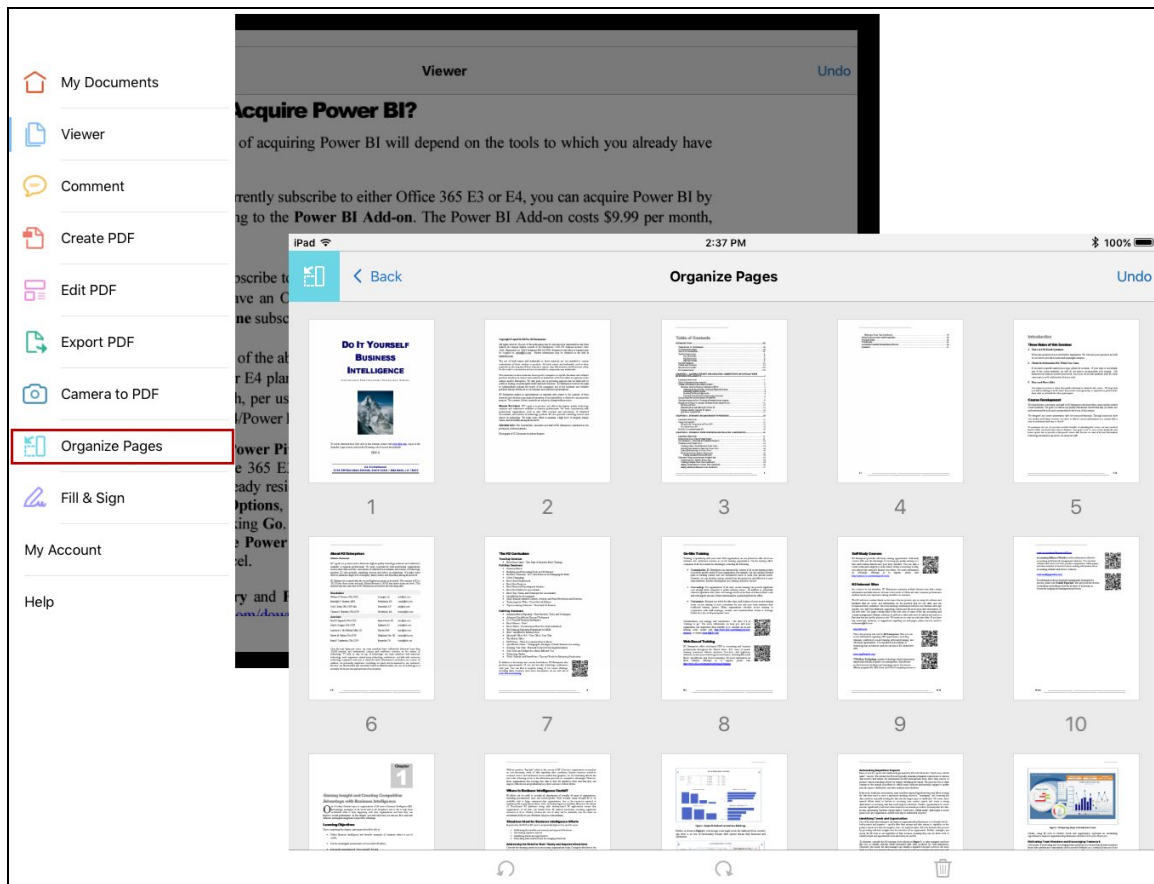


Figure 9 – Organizing Pages on an iPad Using Acrobat Reader

Likewise, you can tap **Fill & Sign** on the left side of the window in Figure 9 to open a form you need to fill and add your signature. As shown in **Figure 10**, you need only to click the “signature” icon near the bottom of the window and choose between a saved signature and a set of initials.

Sample Form Done

PERSONAL INFORMATION

First Name	Last Name	☐ Male	☐ Female
Home Address	City	State	Zip
Phone Number	Email Address		

EMERGENCY CONTACT INFORMATION

First Name	Last Name	☐ Male	☐ Female
Phone Number	Relationship		

By signing I Agree to enter a Sample Gym at my own risk and I agree to the thirty (30) day return policy on anyone in before

Signature I

Pamela G. Smith

TS

Navigation icons: back, forward, search, etc.

Figure 10 – Adding a Saved Signature to a PDF Form

Additionally, you can edit and annotate a PDF on your mobile device. With the desired document open, click the **Edit** icon near the bottom of the Acrobat Reader window to expose the editing and annotation functionality, as shown in **Figure 11**.

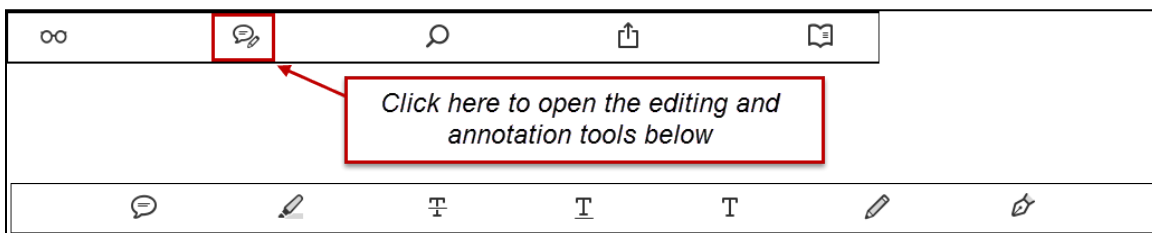


Figure 11 – Accessing Acrobat Reader’s Editing and Annotation Capabilities

You can create PDFs from Word documents and PowerPoint presentations in the mobile app. To do so, open the source file and click **Create PDF** from the left side of the window.

Send and Track Documents Online

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 the document in

the Document Cloud and sends a link so recipients can view or download it. The advantages of this procedure include improved security, since sending email attachments is a notoriously insecure way to share 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 their email address. Further, the Document Cloud provides detailed tracking information when using this option. Add a subject line and a message, then click **Send** to complete the file transfer.

The screenshot shows the 'Send & Track' dialog box in Adobe Acrobat. At the top, there's a 'Selected Files' section with a blue '+ Add Files' button. Below this, a file named '2016 Mississippi Society of CPAs Technology Conference Br....pdf' is listed with a red Adobe logo icon and a close button (X). The dialog has two radio button options: 'Create Anonymous Link (with basic usage information)' and 'Send Personalized Invitations (with detailed tracking)'. The second option is selected. To the right of these options is a 'Recipient Page' section with a checkbox for 'Add Your Logo & Color (Edit)'. Below the radio buttons is the 'Send To' section, which includes an 'Address Book' link and a text input field containing two email addresses: 'tommystephens@gmail.com' and 'demo@k2e.com', each with a close button (X) and a help icon (?). Below the 'Send To' section is the 'Subject & Message' section, which has a text area containing the text 'Shared Files' and 'I have shared some files with you. Please click on the link to view and download them.' At the bottom of the dialog are two buttons: 'Send' (blue) and 'Cancel' (gray).

Figure 12 – Sending Documents Using Acrobat’s Share and Track Feature

Using the personalized invitation feature, those to whom you send the invitation will receive a message that appears like the one in **Figure 13**. Of course, clicking **View File** will allow the recipient to view the document and download it.

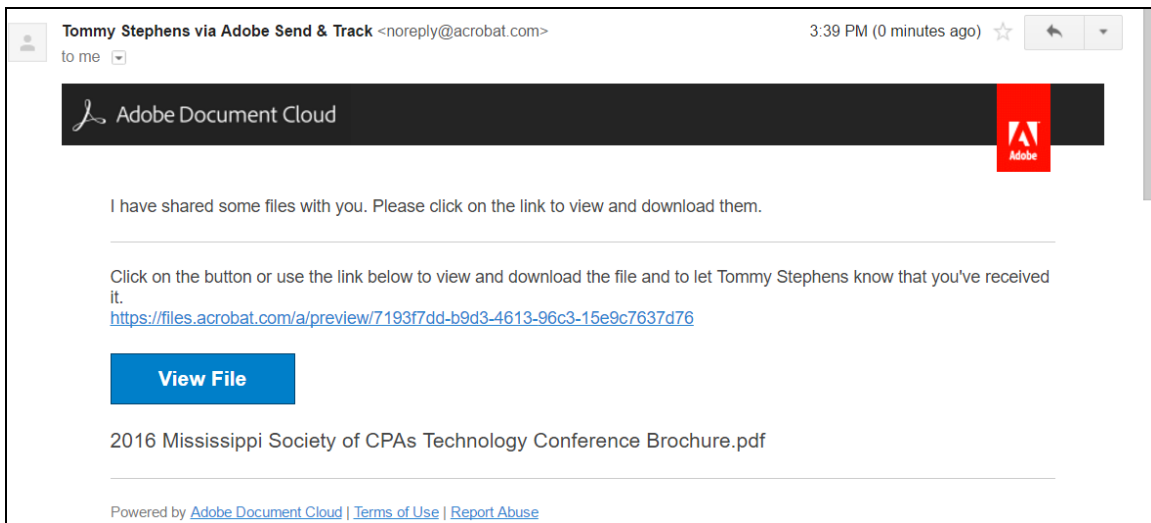


Figure 13 – Message Sent to Recipients of a Shared PDF Document

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

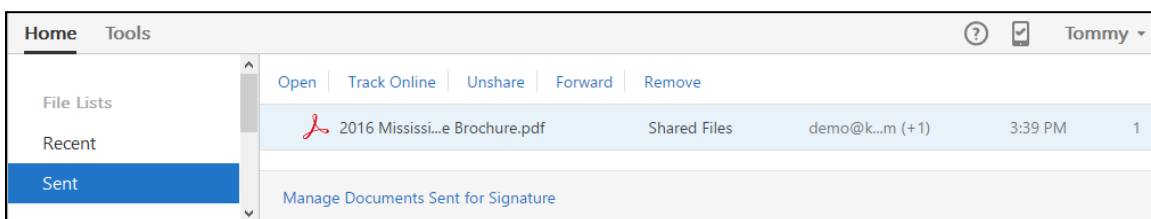


Figure 14 – Tracking Documents Sent through Acrobat's Send and Track Feature

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 15** illustrates the information provided in that audit log.

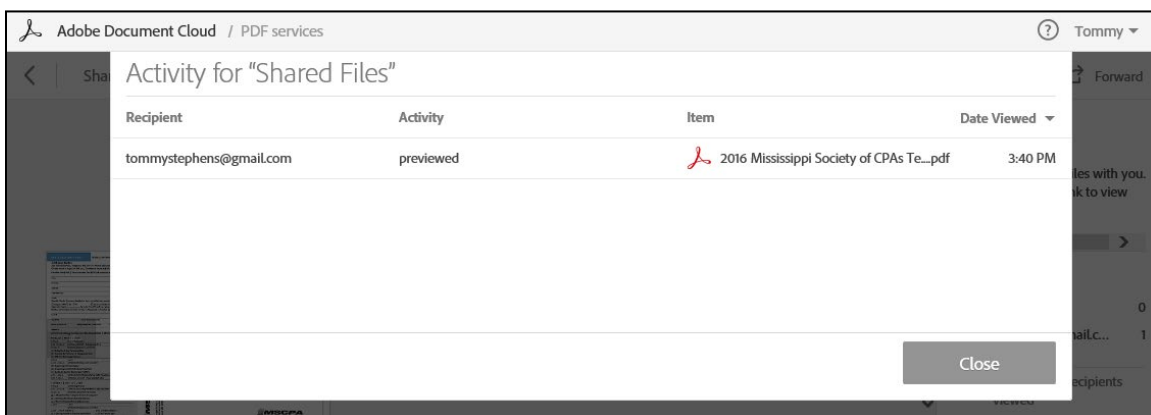


Figure 15 – Viewing Detailed Activity for a Shared File

Fill, Sign, and Send Forms Electronically

You have been able to create fillable electronic forms easily using Adobe tools for years. With Acrobat, filling in, signing, and sending forms is easy. Previously, we discussed this feature in the context of the Acrobat Reader app on mobile devices. Let us now see how we can use Acrobat Standard and Acrobat Pro for the same purpose.



If you have not created fillable forms using Adobe tools, you may be surprised at how easy the process is. Perhaps the most straightforward approach is to design your form's layout in Word or Excel. Then, choose **Prepare Form** from the Tools Pane and select the Word or Excel file you wish to convert to a form.

Alternatively, if you already have a paper copy of the form you want to digitize, you can scan it after choosing Prepare Form. Either way, Acrobat Standard or Acrobat Pro will convert the document to a fillable form, typically leaving you with only minor "touch-up" work for a polished final product.

To begin, open the PDF document that serves as the form you need to complete and sign. Then, click **Fill & Sign** in the **Tools Pane** to access the tools required to fill and sign the form. You should notice your profile information on the right side of the window. You can enter data directly in the **Profile** fields if any of that data is incomplete or incorrect. Once you have complete and correct information, you are ready to proceed.

For any field on the form that requests data stored in your profile, you can drag and drop the data from the Profile directly onto the form. **Figure 16** illustrates this process. To the extent the form requests information not stored in your Profile, you can enter that data manually on the form. To do so, click any **Fill & Sign** toolbar icons to utilize that feature. Then, click in the form to add the requested information. For example, if you need to add text to the form, click the **Add text** icon at the top of the window. Then, click the field where you need to type the text and start typing. Repeat that process as many times as necessary to complete the form.

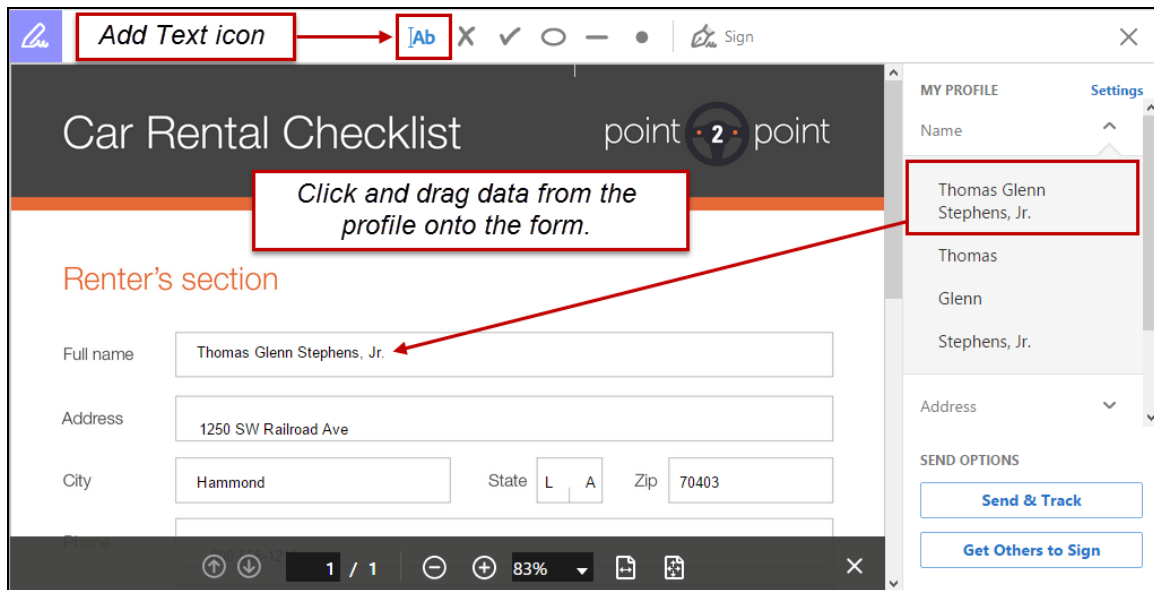


Figure 16 – Using Acrobat’s Fill & Sign Feature

When it is time to sign the form, click the **Sign** icon at the top of the window. This action opens a dialog with your stored signature and initials. If you do not have a signature or initials saved, Acrobat will prompt you to add them. Next, select the signature or initials you want to apply to the document and click and drag the selection to the appropriate field on the form. **Figure 17** illustrates this process. Note that you cannot change fields once you sign and save the document.

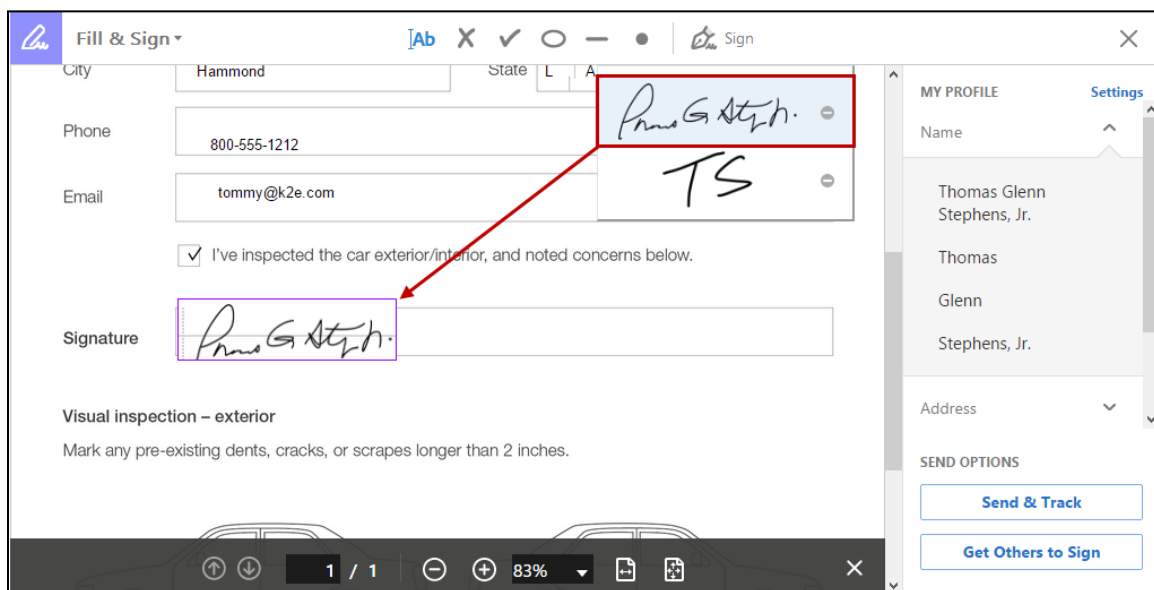


Figure 17 – Adding a Signature to a Document

After filling out and signing the form, click **Send & Track** to send the document to others securely. Or, you could click **Get Others to Sign** if you need additional signatures.

Collect Electronic Signatures from Others

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: Helena Smith | Spouse's social security number: 888888888

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

Line	Description	Amount
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 78a; 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 acknowledgment 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 1-888-303-4537. 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
ERO firm name
as my signature on my tax year 2015 electronically filed income tax return.
Enter five digits, but do not enter all zeros

☐ 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
ERO firm name
as my signature on my tax year 2015 electronically filed income tax return.
Enter five digits, but do not enter all zeros

☐ 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: _____

Search Tools...

Create PDF
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Export PDF
Comment
Organize Pages
Enhance Scans
Protect
Fill & Sign
Prepare Form
Send for Signature
Send & Track
Combine Files

Your current plan is Creative Cloud
Learn More

Figure 18 – 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 – in the form 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 19**.¹

¹ 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...

133%

Prepare Form

reason for any delay in processing the return or return, and (g) the date or any return. If applicable, I authorize the U.S. Treasury and the Department of the Treasury 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 ERO firm name to enter or generate my PIN 1 1 1 1 1 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 Your Signature Date Date

Spouse's PIN: check one box only

☒ I authorize Luca Pacioli ERO firm name to enter or generate my PIN 2 2 2 2 2 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 Spouse Signature Date 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. 1 2 3 4 5 6 7 8 9 1 2 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 19 – 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**, as pictured in **Figure 20**.

Send for Signature

Add recipients in the order in which they will sign:

To:

Show Cc

Enter or paste email addresses

Agreement Name:

Message:

Form 8879 For Electronic Signature.pdf
Upload complete.

Select from: [Document Library](#)

Send

Figure 20 – Sending a Form for Electronic Signatures

Each recipient receives a message similar to the one pictured in **Figure 21** 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 21 – 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**.

Editing Text and Images with Paragraph Reflow

Many do not realize the editing capabilities of Acrobat Standard and Acrobat Pro. These tools' ability to perform editing tasks rivals that of market-leading word processing applications just a few years ago. With these tools, you can quickly and easily edit a PDF document, correct typographical errors, add or delete bullet points, and crop images, among other tasks. Although these editing capabilities have existed for many years, they are better now in Acrobat because paragraphs flow with the edited text.

To edit a PDF document in Acrobat Standard or Acrobat Pro, perform the following steps.

1. Open the document in Acrobat Standard or Pro.
2. Click the **Edit PDF** tool in the Tools Pane.
3. Click the text or image you wish to edit.
4. Add or edit text on the page. Lines and paragraphs reflow automatically, or you can click and drag to resize elements.

5. Add, replace, move, or resize images on the page using selections from the **Objects** list.
6. Click on the **Link, Headers and Footers, Watermark, or Background** tool to edit these objects in your PDF.

To illustrate, in **Figure 22** the only action necessary to convert the bullet point list into a numbered list was to select the desired text and click the **Create a numbered list** option in the task pane on the window's right side.

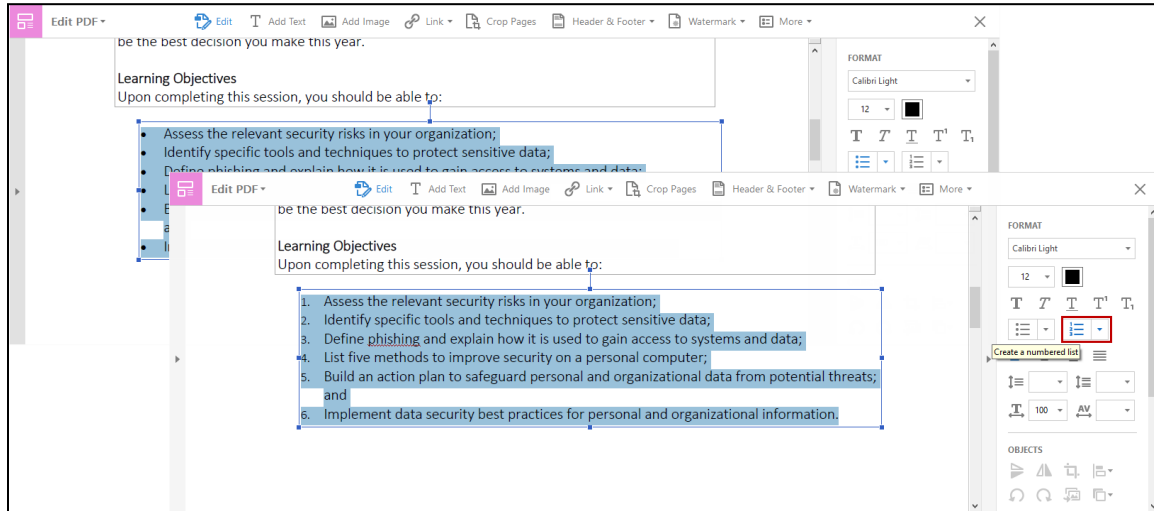


Figure 22 – Converting a Bullet Point List into a Numerical List in Acrobat

Given the price differences between Adobe Standard and Adobe Pro, how can users or organizations justify purchasing Acrobat Pro? Many features important to accountants and other business professionals in Acrobat Pro are not available in Acrobat Standard. The following are some of the most notable differences.

1. Enabling users of Adobe Reader to review documents using familiar commenting tools such as sticky notes, highlighting, lines, shapes, and stamps
2. Enabling users of Adobe Reader to sign PDF documents digitally
3. Deleting sensitive information permanently, including specific text or illustrations, with redaction tools
6. Comparing and highlighting the differences between two versions of a PDF document

Most users are unaware that they can use Adobe Reader to edit PDF documents, but this is possible only if they extend that functionality in Acrobat Pro. The first two enumerated features allow Acrobat Pro users to enable individuals using the free Adobe Reader to perform everyday tasks. Included are reviewing, commenting, marking up, and digitally signing PDF documents. This extended functionality generates cost savings over Adobe Standard and Adobe Pro. However,

you must enable this functionality through Adobe Acrobat Pro before you can edit or modify that document in Reader.

Adobe Pro can also permanently redact sensitive information from PDF documents. If a client requests that her tax return be sent to a bank to support a new loan, Pro users can redact her Social Security Number from the document before transmission. Pro and Pro Extended can also compare PDF documents to identify and highlight differences. For example, an organization can transmit a contract to a client for a signature and then compare the signed and returned document to the original to ensure that no one changes the contract's terms.

The next significant difference between Standard and Pro involves the Portfolio feature, which allows users to assemble and organize a group of PDF documents or other files into a single PDF. Acrobat Pro enables users to create customized Portfolios to maintain or extend their market branding. For example, public practitioners may assemble a tax return, supporting schedules, and scanned receipts into a single PDF for transmission to their clients. Further, the supporting documents could be Excel, Word, or other file types. A Portfolio typically includes the practitioner's name, address, and contact details, but Pro users can change styles, fonts, and colors and add logos to extend their brand image.



What are the primary differences between the current versions of Adobe Acrobat and the prior versions of Adobe Acrobat? How do the cloud-based options potentially affect how you use the platform?

Creating PDF Documents

Chapter

2

For many business professionals, their only exposure to PDF documents has been via Adobe Reader. Similarly, many professionals who routinely use PDFs believe that Acrobat is the only product for creating or manipulating them. However, as discussed in the first chapter, PDF is an open standard, and many products exist for creating and managing PDF documents. In this chapter, the focus shifts to creating PDF documents using Adobe Acrobat tools.

Learning Objectives

Upon completing this chapter, you should be able to:

- Create PDF documents from external data sources such as Microsoft Word documents using the Print function and the PDFMaker Add-in;
- List and describe four techniques for creating PDFs from within Acrobat;
- List two techniques for creating PDFs from multiple files; and
- Define Optical Character Recognition and describe using Acrobat to convert an unreadable document into editable text.

Creating PDF Documents

Acrobat provides three primary methods of creating PDF documents.

1. Using the **Adobe PDF Printer**, which employs Adobe Distiller to convert the document, the printing process creates a flat file devoid of internal structure. The file treats headings, tables of contents, and other tagged elements in the source document as if they were any other text. As a result, PDFs created with the Adobe PDF Printer do not contain automatically generated comments or bookmarks for navigation.
2. Using the **PDFMaker add-in for Microsoft Office Word, Excel, PowerPoint, or Outlook** – This method creates a tagged document that maintains the internal structure of the original document. However, the process can be cumbersome and take longer to complete. By default, PDF Maker automatically creates bookmarks from Word heading styles and maintains the navigation provided by Word's automatically generated tables of contents. However, for this method to yield the automated navigation elements described, formats in the original document must have been applied using Word styles.

3. Using **commands available from Acrobat toolbars or menus** – Acrobat provides several ways to create PDF documents from within the application. For example, you can create PDFs directly from files, a scanner, a web page, an image copied to the clipboard, or a blank page. Acrobat can also create a single PDF from multiple files, batch-create multiple PDFs from multiple files, or assemble a PDF portfolio from several files. These processes preserve the internal structure of the files created.

Printing to PDF

Acrobat creates a PDF printer as part of its typical installation. The Adobe PDF printer allows users to create a PDF from within an application by capturing the print stream when a document prints. Generally, Adobe renders a document to PDF just as it would if printed to paper.

The Adobe PDF printer can be specified at print time or set as the default printer, just as with any other print device. Also, you can modify default PDF creation preferences such as Acrobat compatibility, graphic resolution, security, or the output folder.

To modify PDF creation preferences, follow these steps.

1. Right-click the **Adobe PDF** printer icon in the **Devices and Printers** folder and select **Printing Preferences**, as shown in **Figure 23**.
2. Change the printing preferences as desired and click **OK** to commit the changes. Alternatively, save the custom settings for future use. Click **Save As**, enter a name for the custom settings, click **Save**, and click **OK**.



Print to PDF is widely available with applications other than Adobe Acrobat, many of which are free. Note that Microsoft Office can create PDFs with its built-in PDF creation capabilities.

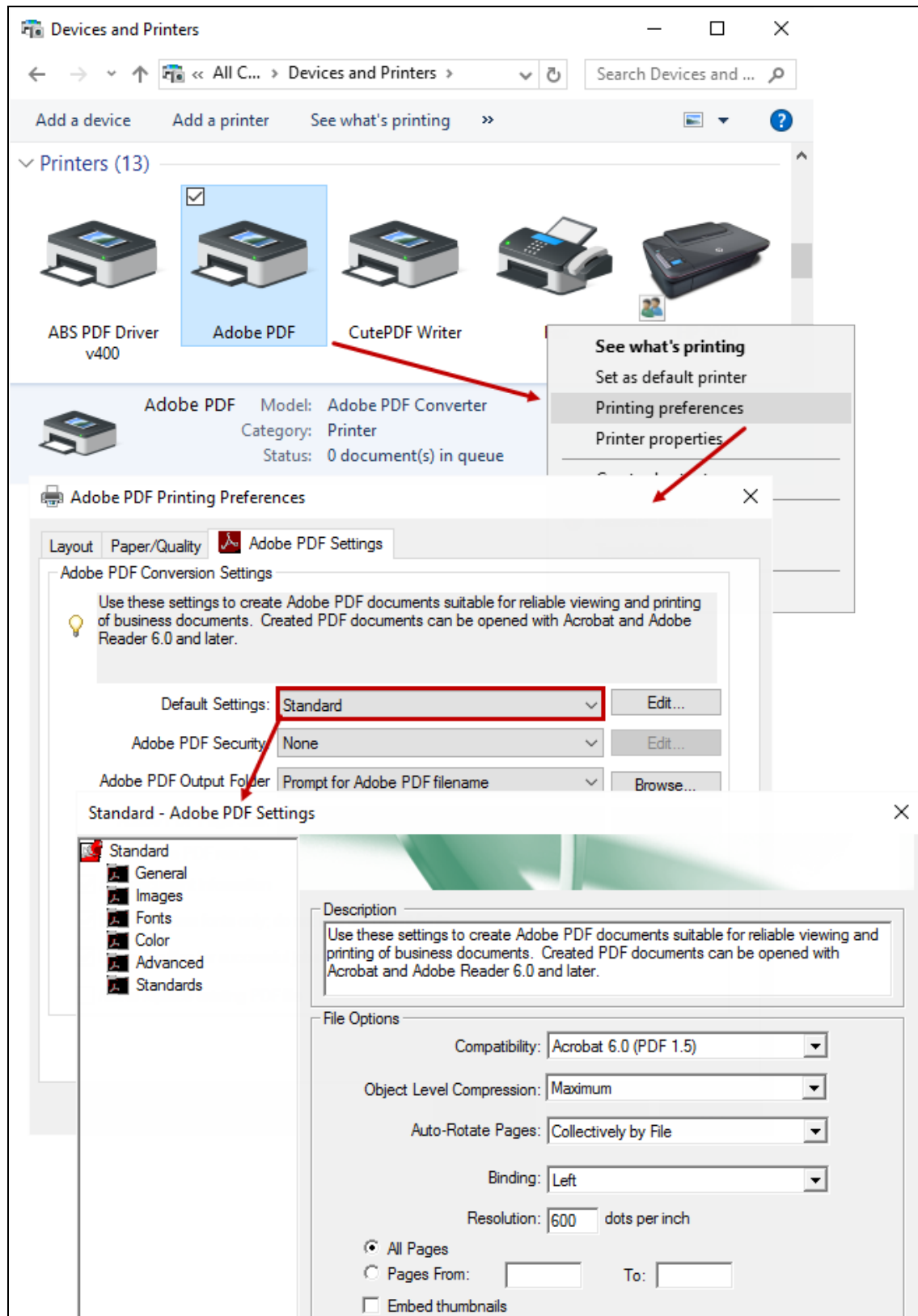


Figure 23 – Customizing Adobe PDF Printing Preferences

Using the PDFMaker Add-in

In Microsoft Office, Acrobat automatically installs the **PDFMaker** add-in. This add-in creates an **Acrobat** tab on the Ribbon, as shown in **Figure 24**. Additionally, the PDFMaker add-in modifies other selections on the **File** tab of the Ribbon.

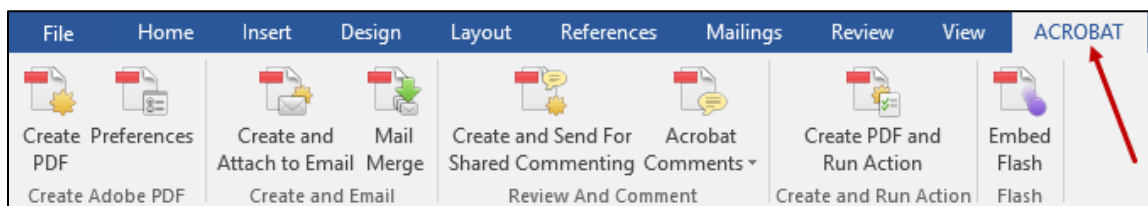


Figure 24 – Acrobat Add-in Tab in Word 2016

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 25**.
2. In the **Acrobat PDFMaker** dialog box, change the conversion preferences as desired and click **OK** to accept the changes.

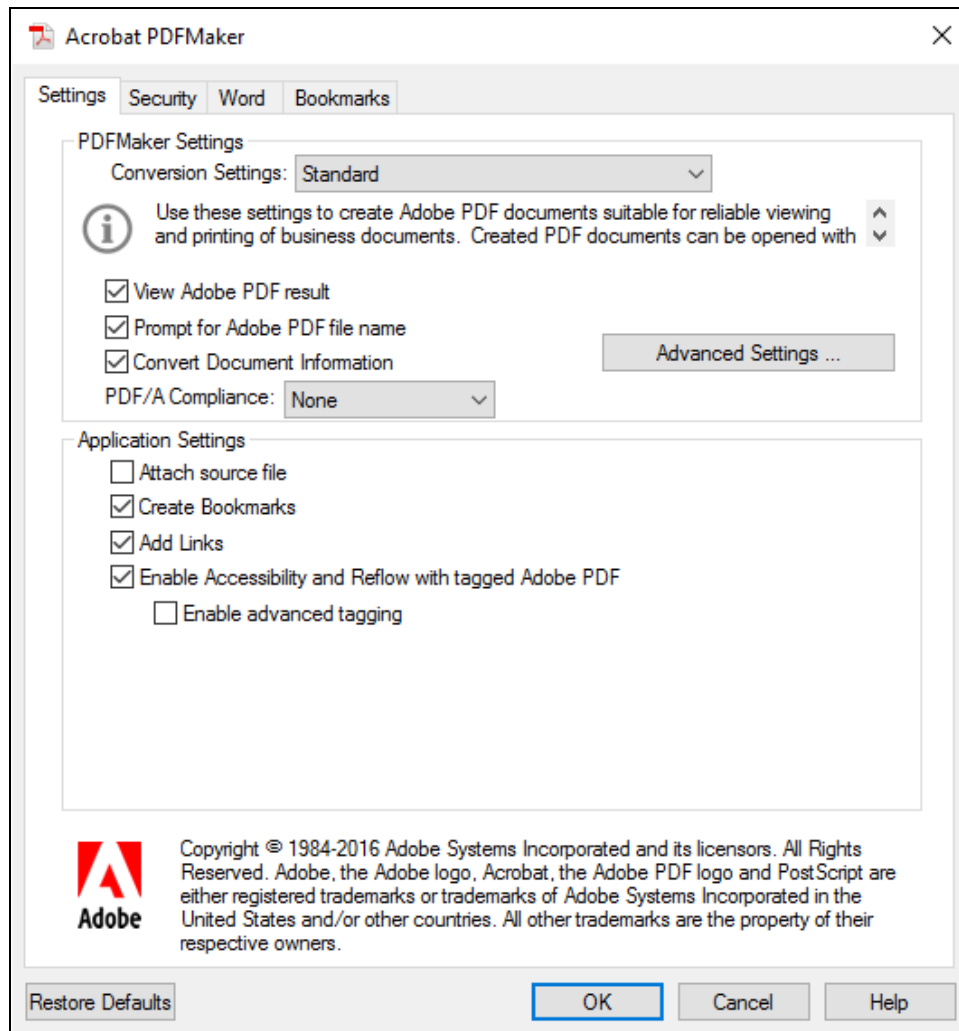


Figure 25 – Modifying PDFMaker Conversion Preferences

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 significant advantage of PDFMaker is that it understands formatting, including styles from Microsoft Word documents. PDFMaker can automatically convert formatted section headings into bookmarks in the resulting PDF. It can also convert Word tables of contents into clickable tables of contents in a PDF document. For users unfamiliar with Word styles and formatting, the Styles gallery lets them 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 26** shows the **Styles** gallery in Microsoft Word. To fully understand the importance of styles and their impact on working with PDFs in Acrobat, let us briefly review their use in Microsoft Word.



Figure 26 – The Styles Gallery in Microsoft Word

If the formatting in a Word document is applied using styles, the metadata and structure of the document will be preserved in the PDF after conversion. By default, subject headings convert to bookmarks, and table of contents entries convert to hyperlinks, allowing quick navigation to a specific section or page in the PDF document. **Figure 27** displays the bookmarks in a PDF document created automatically during conversion.

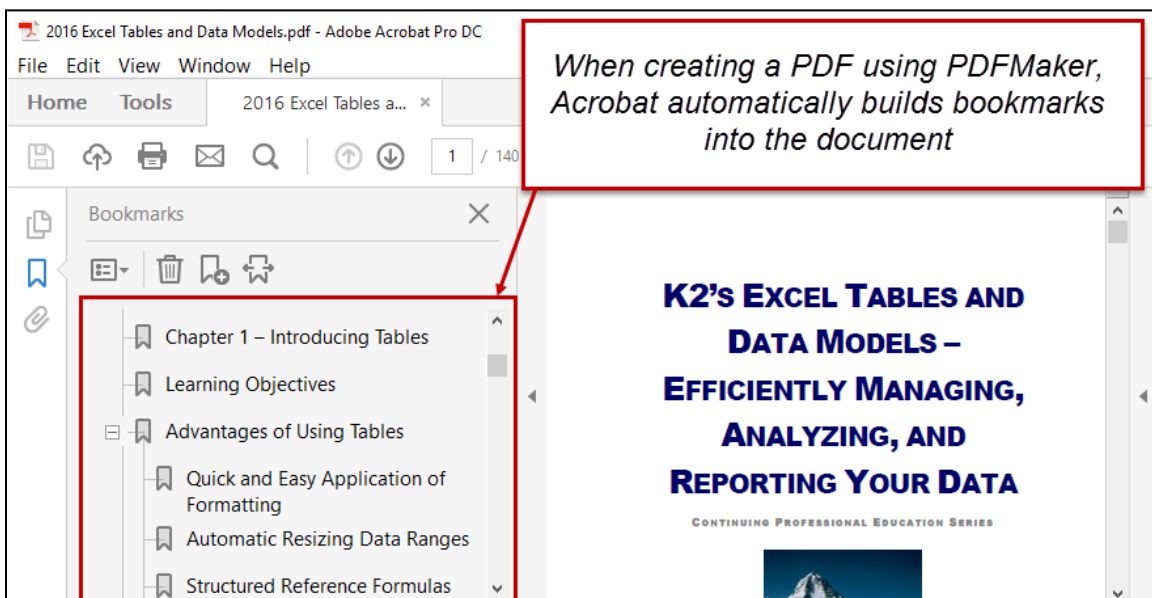


Figure 27 – Bookmarks Created Automatically in Acrobat from Word Styles

Adobe 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 used styles. While creating the PDF, PDFMaker generated a clickable table of contents with each entry a hyperlink to its respective location in the PDF. The table of contents allows readers to easily navigate the document.

Creating a PDF from within 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 28**, or from the toolbar by clicking the **Create** icon, as shown in **Figure 29**.

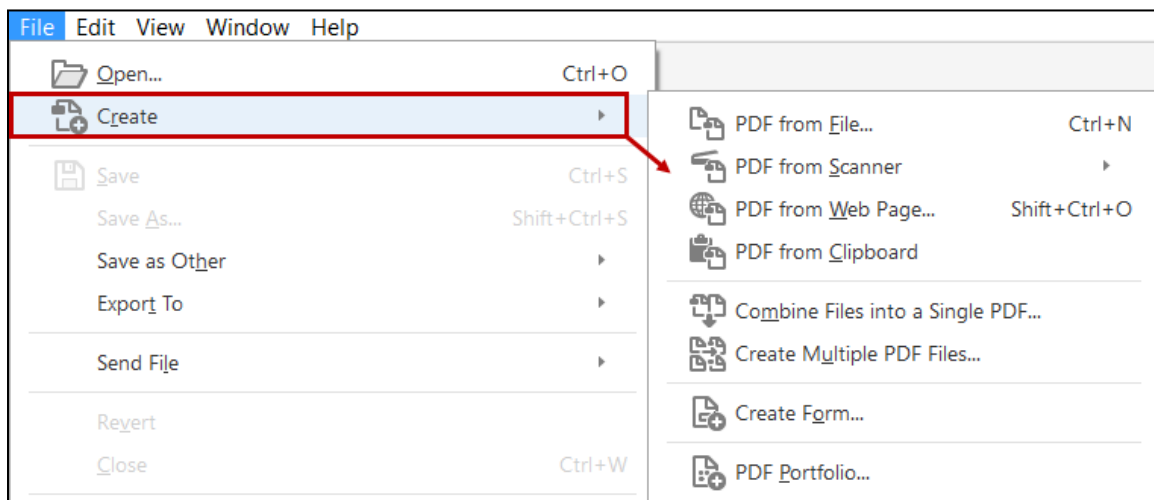


Figure 28 – Creating a PDF from the File Menu

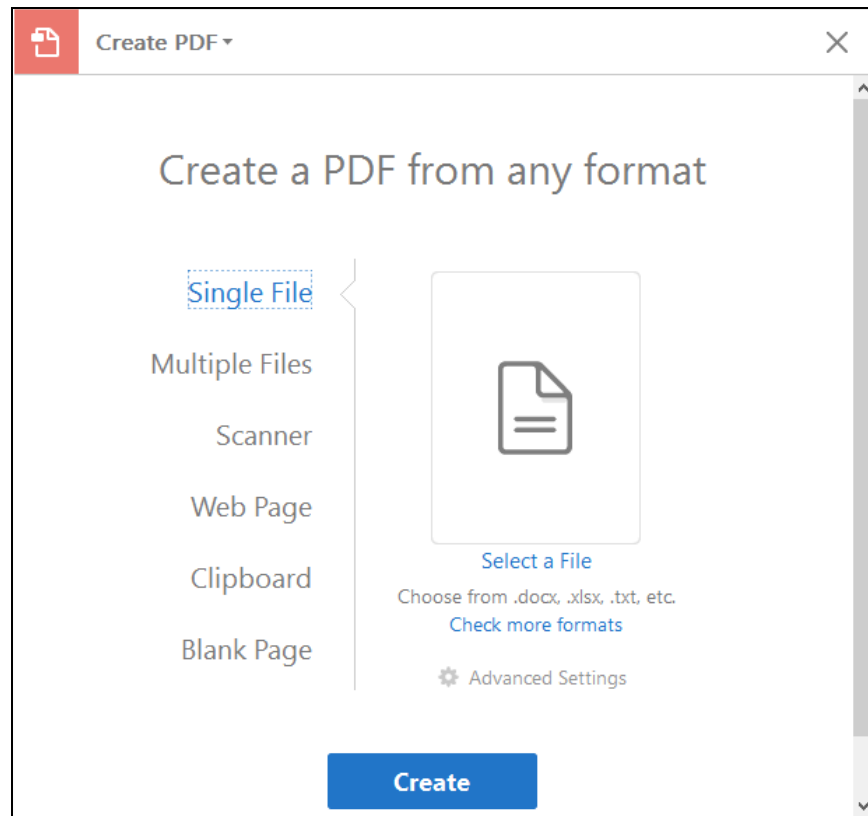


Figure 29 – Creating a PDF from the Toolbar

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 chosen file must be in 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 30**.

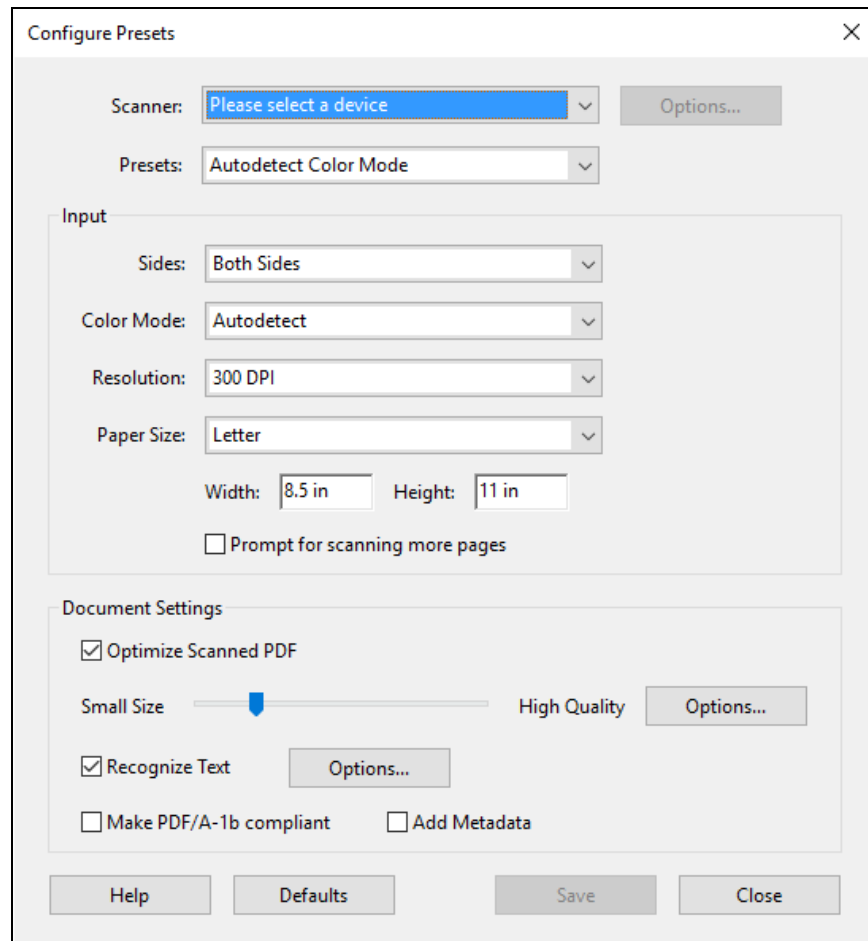


Figure 30 – Configuring Scan Settings in the Custom Scan Dialog Box

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 lets users adjust image settings to improve scanned image quality. 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 simple copy-and-paste from the PDF yields an image rather than editable text. However, there is no need to rescan 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 31**. When the action is complete, the text in the document will be searchable and selectable, yielding satisfactory results in cut-and-paste operations.

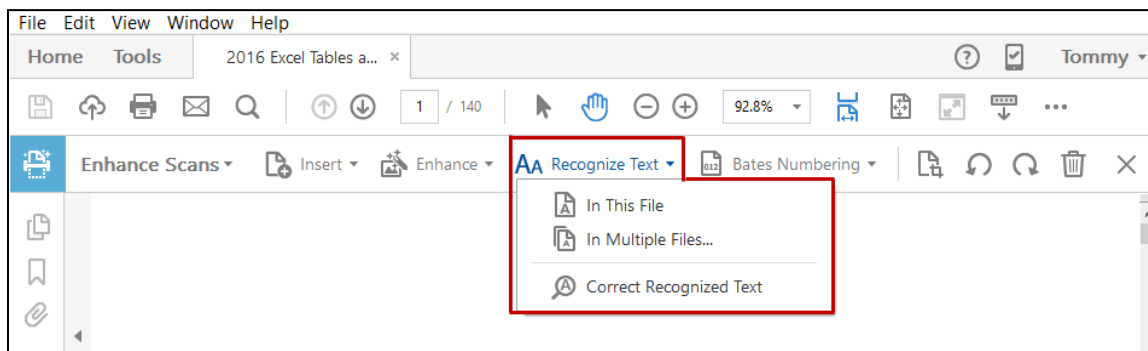


Figure 31 – Running OCR after the Fact

Figure 31 illustrates that 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 run OCR on all the files 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 way to capture an article for later reading or review. 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 that let you navigate it as if it were a live website. This feature, for example, would allow salespeople to access an online product 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 32**.

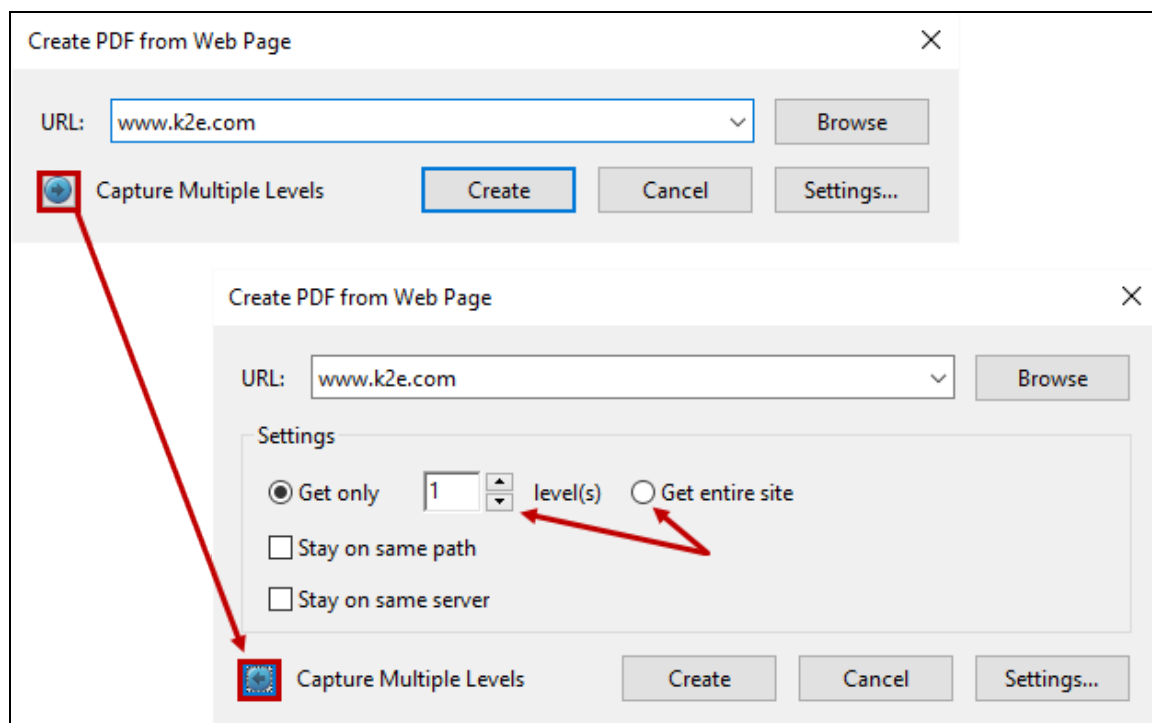


Figure 32 – Creating a PDF from a Web Page or Website

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 the PDF should be created from pages on the same path or on the same server to reduce its size. Additional settings, such as whether to create bookmarks, can be configured by clicking the **Settings** button. The time required to capture an entire website depends on the website's complexity and size, as well as your Internet connection speed.

Figure 33 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 on the live website. In this case, the created PDF file was less than one megabyte in file size.

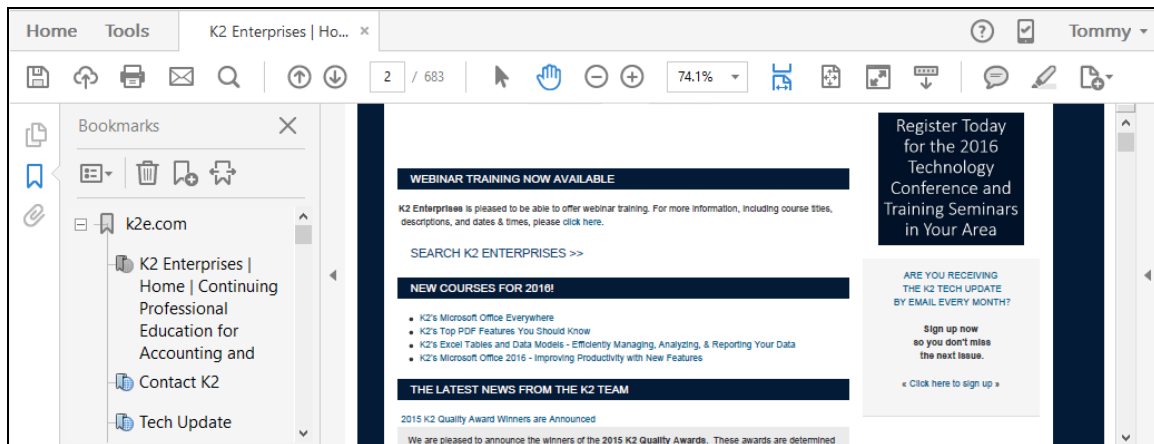


Figure 33 – PDF Created to Capture an Entire Website

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 preserving the original files' internal structure. For example, you can select specific pages of Word documents or specific 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 PDFs; instead, they retain their native formats within the portfolio's “wrapper.”

Merging Files into a Single PDF

Merging files is an excellent option at the end of a project, audit, or compilation to consolidate all the working files into a single PDF that serves as an archive or historical record. The combined files need not be PDFs; they 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 the plus sign above a document to expand the content, then choose the desired pages. Finally, rearrange the content, specify an appropriate file size, and click **Combine Files**, as shown in **Figure 34**.

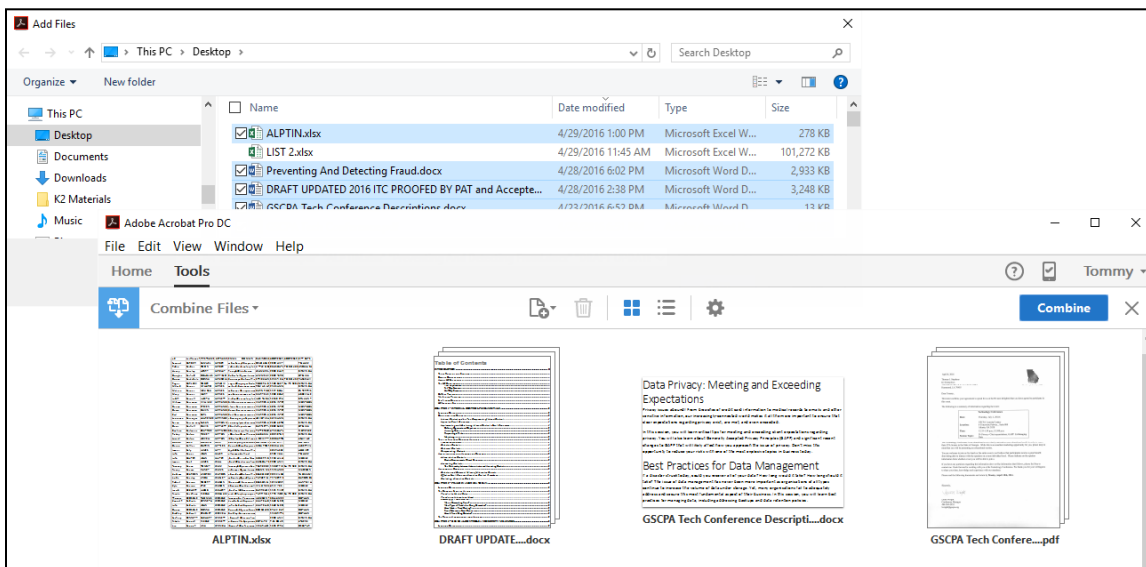


Figure 34 – Merging Files into a Single PDF

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, then clicking **Create** in the lower-right corner of the window. **Figure 35** displays a portfolio during the creation process.

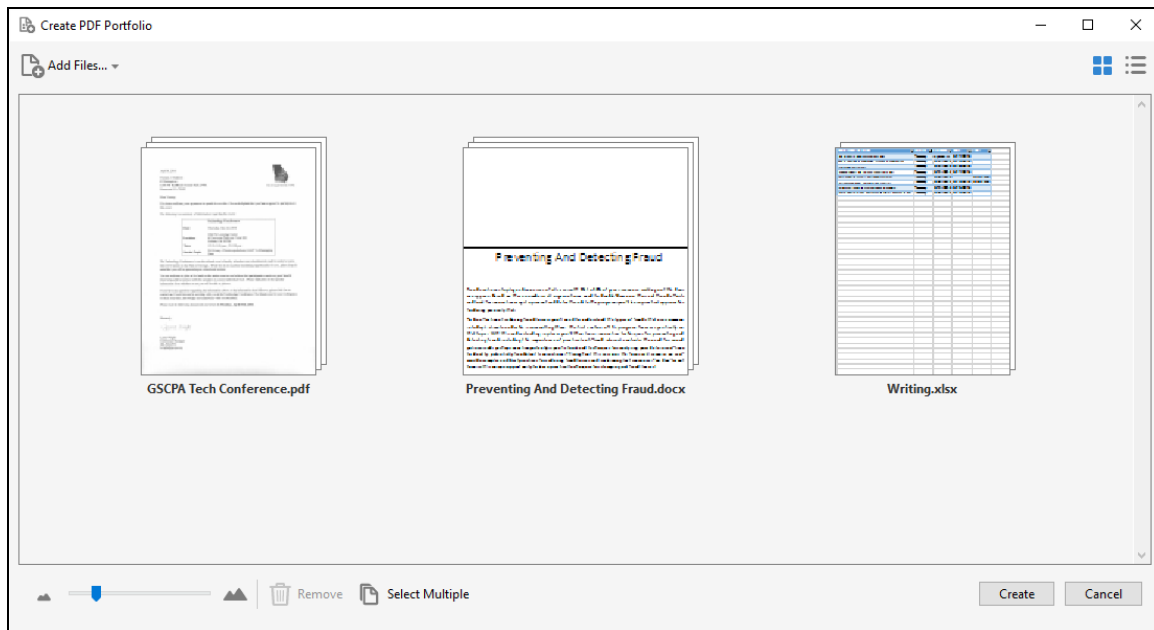


Figure 35 – Creating a PDF Portfolio

Creating a Batch of Individual PDFs

When you need to convert multiple documents or spreadsheets into individual PDF files, Acrobat can batch-process them 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 36**. Next, add files or folders, like merging files into a single PDF, and click **OK**.

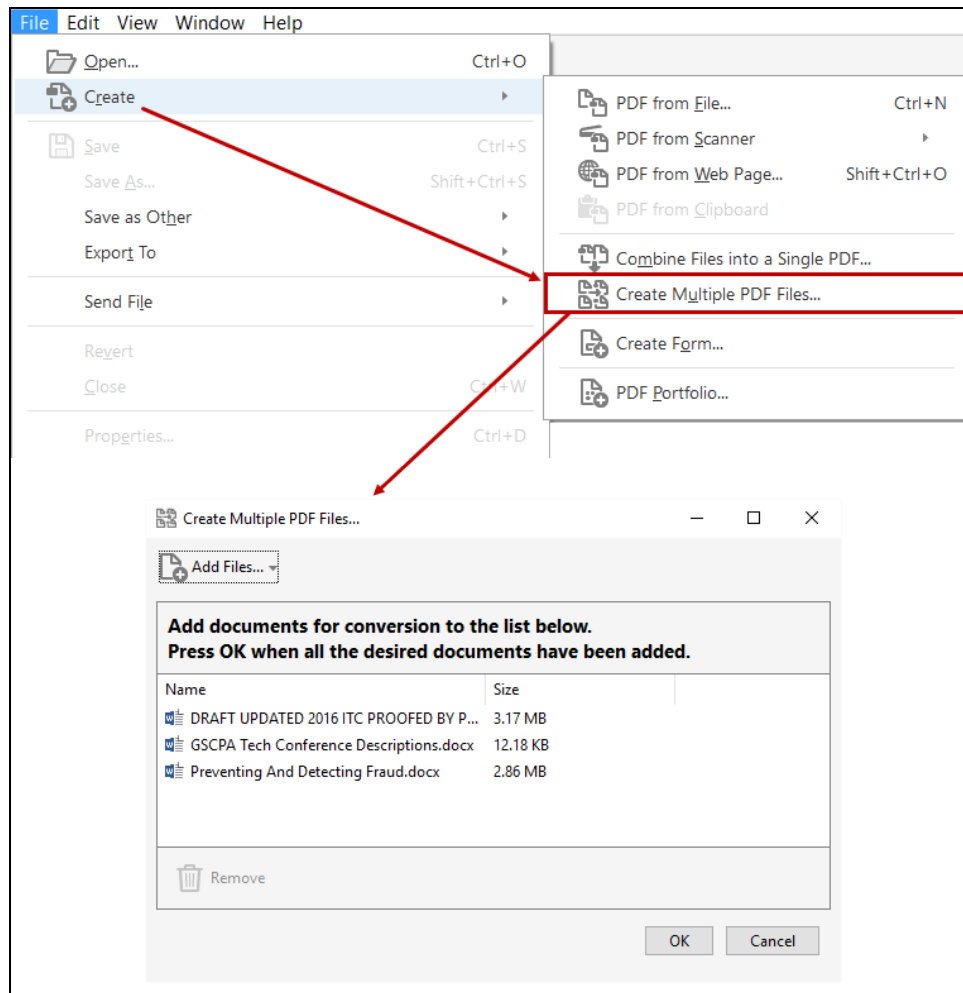


Figure 36 – Processing Multiple Files into Individual PDFs

?

When creating a PDF document from Word, what is the importance of ensuring that the Word document is formatted using Word's *Styles* feature?

Organizing PDF Files

Chapter

3

PDFs are incredibly useful, but simply creating them is insufficient to use them effectively and efficiently in business settings. PDF documents are often modified during use. For example, pages need to be rearranged or deleted, additional pages or entire documents need to be appended, headers or footers need to be added, watermarks need to be applied, or navigation aids need to be created. PDFs can become time-consuming and cumbersome without the skills to perform the tasks required most often. In addition, when jobs or projects are complete, a systematic way to combine PDFs for archival storage is frequently needed. This chapter covers the skills required to organize, archive, and retrieve information from PDF documents. The conversation begins by discussing how to manipulate and rearrange pages within a PDF.

Learning Objectives

Upon completing this chapter, you should be able to:

- Identify the processes required in Acrobat for reorganizing pages and splitting the content of a PDF;
- Create bookmarks in PDFs and use them to assist in navigating through documents;
- Add and edit headers and footers to PDF documents;
- Create and add watermarks and backgrounds to PDF documents; and
- Attach other documents to PDFs.

Users sometimes need to combine individual PDF documents or insert, extract, replace, delete, or rearrange pages in an existing document. You can complete all these tasks by clicking the **Organize Pages** button on the toolbar to access the tools highlighted in **Figure 37**.

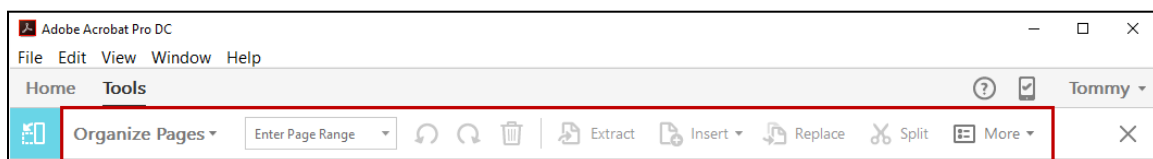


Figure 37 – Page Manipulation Commands Accessible from Organize Pages

Another way to make these sorts of modifications quickly and intuitively is in the Navigation Pane. Just right-click in the Pages panel and select the appropriate action. Note that you can

expand or contract the Navigation Pane by dragging the right border of the pane. You can also change the size of the page thumbnails to make them larger or smaller by using the Page Size Slider tool shown in **Figure 38**.

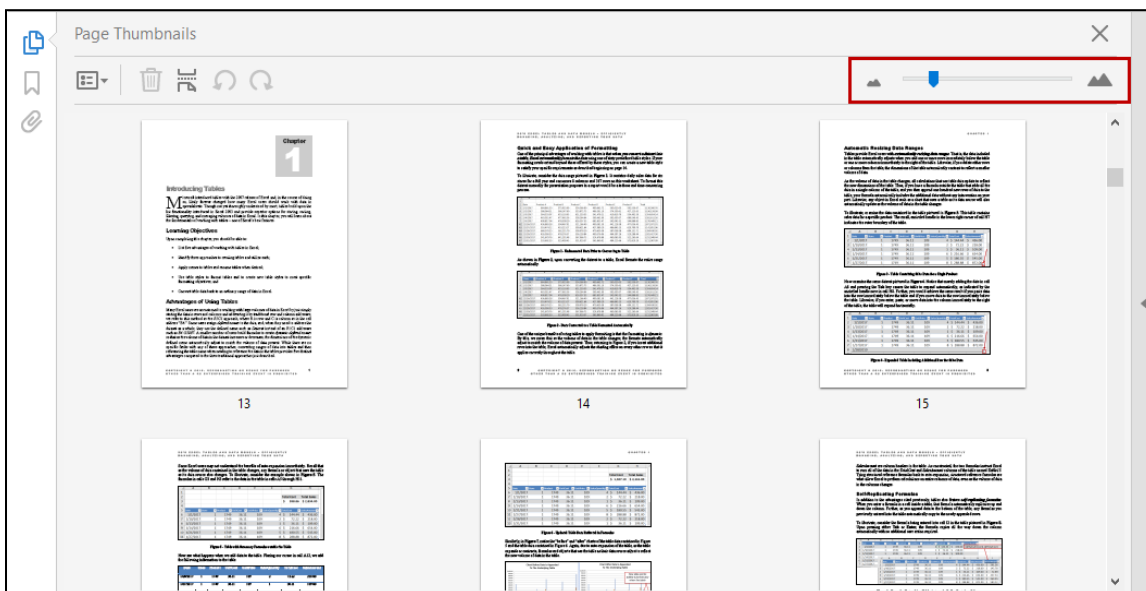


Figure 38 – Manipulating Pages in the Navigation Pane

To delete pages from a PDF, select the thumbnails of pages to delete in the Pages panel, press **Delete**, and then confirm the deletion by clicking **OK**. You can choose multiple pages by holding down the **CTRL** key while clicking the page thumbnails. Also, use the **SHIFT** key to designate endpoint thumbnails between which you will delete all pages.



CAUTION! Page manipulation actions are permanent. You cannot use the **Undo** command to restore a document to a previous state after executing a command or dragging a page to a new location. Once you save a document, Adobe permanently commits all changes. If you make an unwanted change accidentally, close the file without saving it.

Instead of deleting a page or pages, you may need to extract a page or pages from an existing PDF. For example, clients may request copies of their W-2 or 1099 forms from their tax returns. To extract pages from a PDF, select the page or range of pages to remove and then right-click and choose **Extract Pages** from the context-sensitive menu. Then, in the **Extract Pages** dialog box, confirm the pages to extract and check **Delete Pages After Extracting** or **Extract Pages As Separate Files**, as shown in **Figure 39**. Note that you cannot extract *non-contiguous* pages in the same action. In addition, the pages marked for extraction must be in a contiguous range.

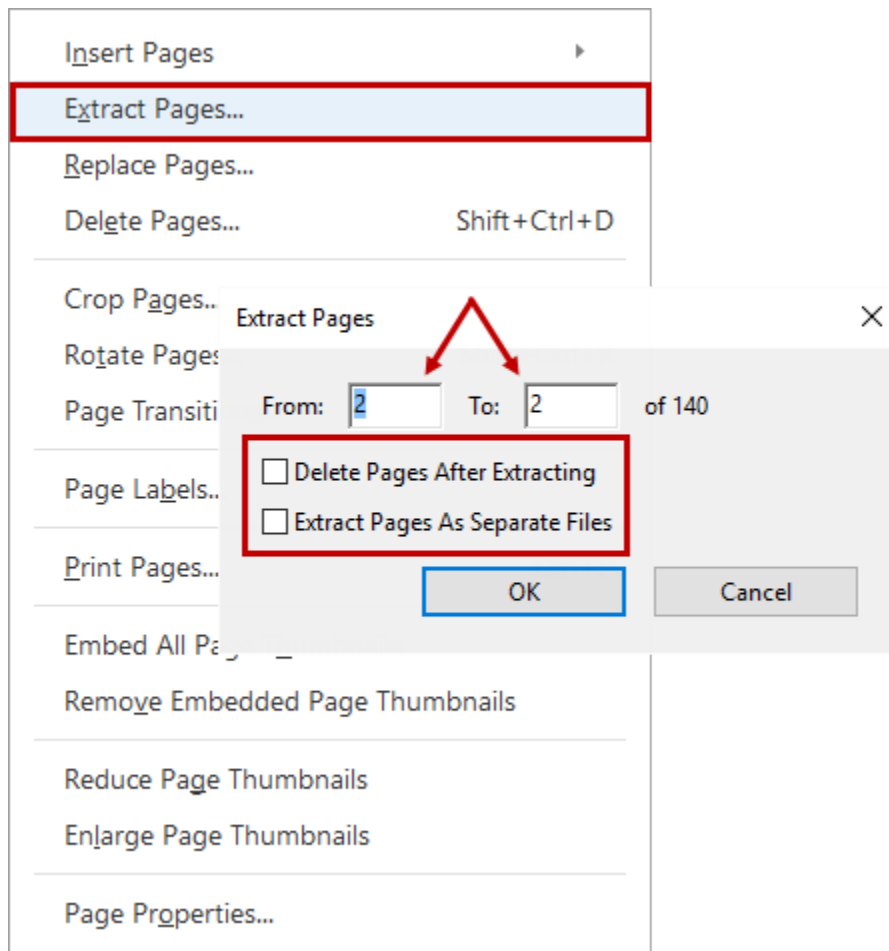


Figure 39 – Extracting Pages from a PDF

To insert pages into a PDF, position the cursor in the Page pane by selecting a page where you want to insert the new page(s). Then right-click and choose **Insert Pages, From File** from the context-sensitive menu. In the **Select File to Insert** dialog box, choose the file to insert and click **Select**. In the **Insert Pages** dialog box, identify where you want to insert the new pages: **Before** or **After** the **First Page**, the **Last Page**, or a selected page. Click **OK** to complete the process. Note that the Insert Pages command inserts an entire PDF document, not individual pages. If you need to insert individual pages, extract them to a separate file or files, then insert them into the document.

Note also that you can insert pages from the system clipboard. For example, you can copy paragraphs, pages, or images from Microsoft Word, Excel, Internet Explorer, or any other application, such as a tax or write-up solution. Once copied, you can insert the copied text or images as pages using the **Insert Pages, From Clipboard** command shown in **Figure 40**. Acrobat will convert the text to PDF and insert it at the specified location. This capability allows users to modify existing PDF documents incrementally without the cumbersome process of creating a PDF to insert into a document.

You can also copy an entire PDF document to the system clipboard and then paste it into another PDF. To copy a PDF to the clipboard, open the PDF and select **Edit, Copy File to Clipboard**. First, open the PDF file where you want to insert the document. Then use the **Insert Pages, From Clipboard** command to complete the process.

A change introduced with the release of Acrobat X and carried forward in subsequent versions is the ability to insert a blank page between existing pages in a PDF document. You can accomplish this by using the **Insert Pages** menu and choosing **A Blank Page**. Alternatively, you can use the keyboard shortcut **SHIFT+CTRL+T**.

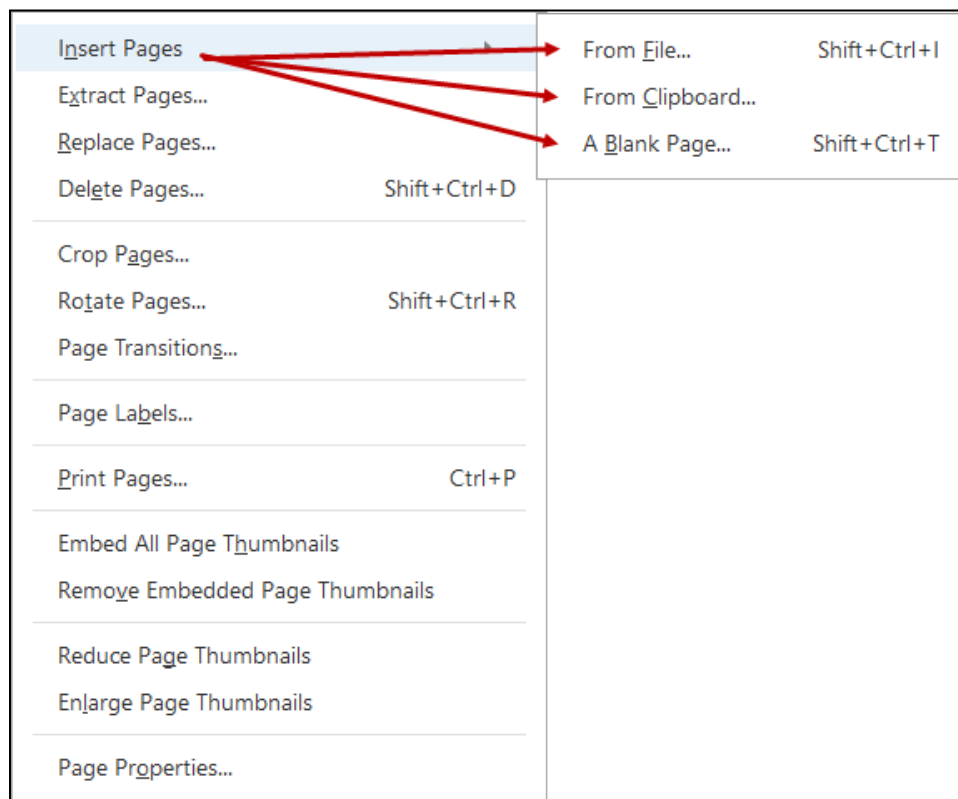


Figure 40 – Insert Pages Menu on Navigation Pane

Acrobat also allows users to replace existing pages in a PDF with updated pages. For example, accountants could use this process to edit a PDF copy of a client's tax return. After a client approves her tax return, you can print the signature page, have the client sign it, and then scan it to add it back to the PDF. The digital copy of the signed return is now ready for archiving without scanning the entire document. To replace an existing page, select the page in the Page pane. Then right-click the mouse and select **Replace Pages** from the context-sensitive menu. Next, in the **Select File with New Pages** dialog box, select the file containing the replacement pages, then click **Select**. Next, in the **Replace Pages** dialog box, identify 1) the page or range of pages to replace in the existing document and 2) the page or range of pages to make the replacement. Click **OK** and then confirm the action to complete the process.

Note that the Replace Pages command replaces a single page or a range of pages in a document. More importantly, replacing pages rather than inserting new pages and deleting the old ones maintains the file's internal organizational structure and navigational elements. For example, if a W-2 in a tax return PDF were bookmarked and subsequently replaced, the updated W-2 would also be bookmarked. This action would maintain the internal structure of the tax return working papers. However, inserting a new W-2 and then deleting the old one would break the existing bookmark and compromise the document's organizational structure. To move pages within a PDF, click and drag the page or pages to the desired location in the **Pages** pane of the Navigation Panel, as shown in **Figure 41**.

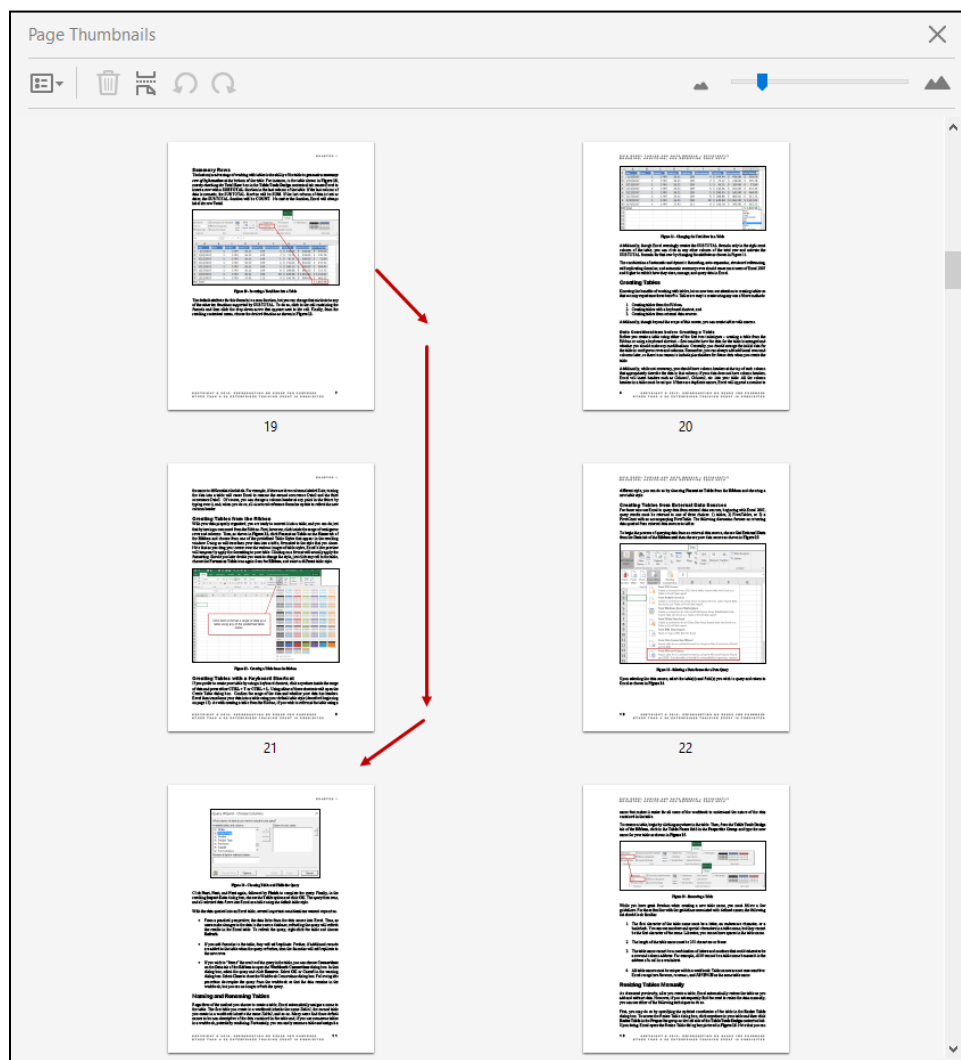


Figure 41 – Moving a Page Using Click-and-Drag

You can rotate pages to better accommodate large images or spreadsheets, which are more easily viewed or presented in landscape orientation. First, select the page you need to turn. Then right-click and choose **Rotate Images** on the context-sensitive menu. In the **Rotate Pages** dialog box, select the direction of rotation, the range, and the characteristics of the pages to rotate, as

shown in **Figure 42**. Click **OK** to complete the process. Note that users can **Undo** or **Redo** page rotation from the **Edit** menu.

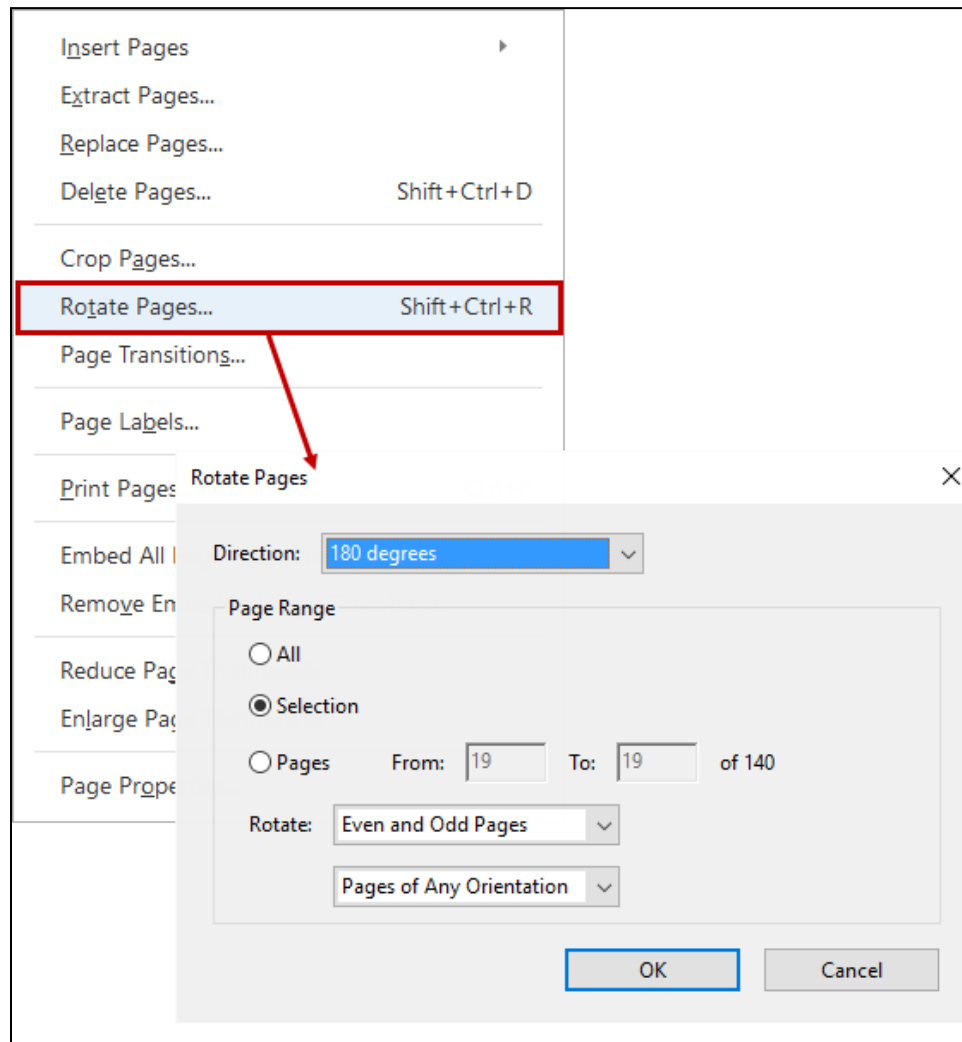


Figure 42 – Rotating Pages for Better Viewing

Splitting Documents

You can split one or more documents into multiple smaller documents. For example, accounting staff at a small office maintenance company generate monthly invoices using mail merge in Microsoft Word. Each of the seventy-eight customers receives a single-page invoice. After merging the invoices into a single Word document, the staff prints the document to PDF using the Adobe PDF printer. The PDF containing the seventy-eight invoices splits into seventy-eight one-page PDFs so the team can mail them to customers.

When splitting a document, you can configure Acrobat to divide the file by the maximum number of pages, file size, or top-level bookmarks. For example, to split one or more open PDFs, use this procedure.

1. Select **Split** from Organize Pages, as shown in **Figure 43**.
2. In the **Split Document** dialog box, specify the criteria for dividing the document.
 - a. **Number of Pages** – Specify the maximum number of pages for each document in the split.
 - b. **File Size** – Specify the maximum file size for each document in the split.
 - c. **Top-level Bookmarks** – Acrobat creates one file for every top-level bookmark if the document contains bookmarks.
3. Click **Output Options** to specify file-naming preferences and a target folder for the split files. You can run the command on multiple files by clicking Apply to Multiple and selecting **Add Files**, **Add Folders**, or **Add Open Files**. Click **OK** to complete the process.

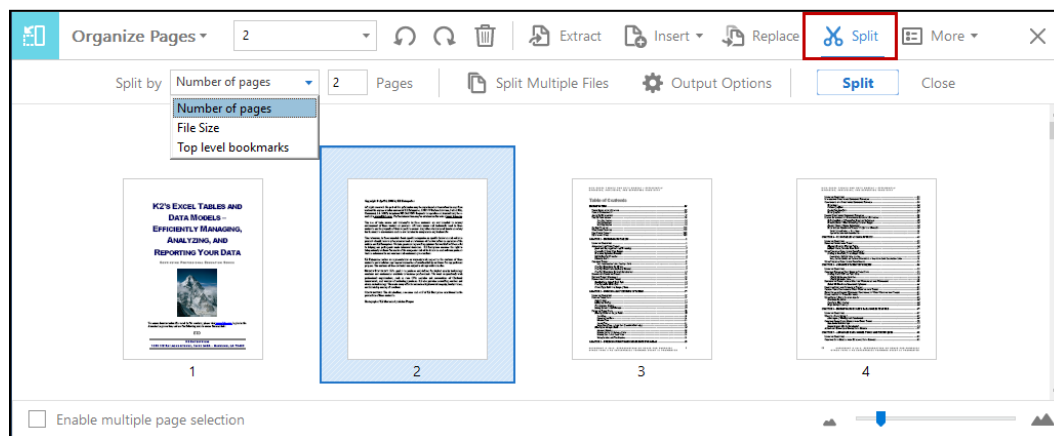


Figure 43 - Split Documents Navigation

Note that the Split Document command is available only from the Pages menu of the Tools Pane. You cannot access it from the context-sensitive menu in the Pages panel of the Navigation Pane.

Bookmarks

Bookmarks are links displayed in the Navigation Pane; you can use them for navigating to specific locations in a document. However, you can also use them to navigate other documents or web pages. Additionally, you can use bookmarks to perform different actions, such as executing a menu item, submitting a form, playing media files, or running JavaScript. Users can generate bookmarks manually and also automatically using the PDFMaker add-in. Automatic bookmark generation is the most efficient and effective way to create bookmarks in lengthy documents

such as policy and procedure manuals. However, you must use Styles in the source document to automatically generate bookmarks. Additionally, you should create the PDF using the PDFMaker add-in because the Adobe PDF printer will not automatically create bookmarks.

Execute these steps to create a simple bookmark in an open document to navigate to a specific location in the file.

1. Open the **Bookmark** panel in the Navigation Pane.
2. Navigate to the page to be displayed when the bookmark is selected. Arrange the page view and adjust the page **Zoom** as desired.
3. Place the cursor in the document at the bookmark's desired location.
 - a. To bookmark text, drag the cursor across the text to select it. The selected text will become the label of the new bookmark. You can edit the label after you create the bookmark.
 - b. To bookmark an image, select the image or drag a rectangle around the image or part of the image.
4. If bookmarks exist in the document, select an existing bookmark under which you will create the new one. If you do not choose a current bookmark, Acrobat will add the new bookmark to the bottom of the list.
5. Click the **New Bookmark** or the **Options** button and select **New Bookmark** from the menu. Alternatively, right-click on the page and choose **Add Bookmark** from the context-sensitive menu, as shown in **Figure 44**. If you prefer a keyboard shortcut, you may insert your bookmark by pressing **CRTL+B**.
6. Type in or edit the name for the new bookmark if desired.

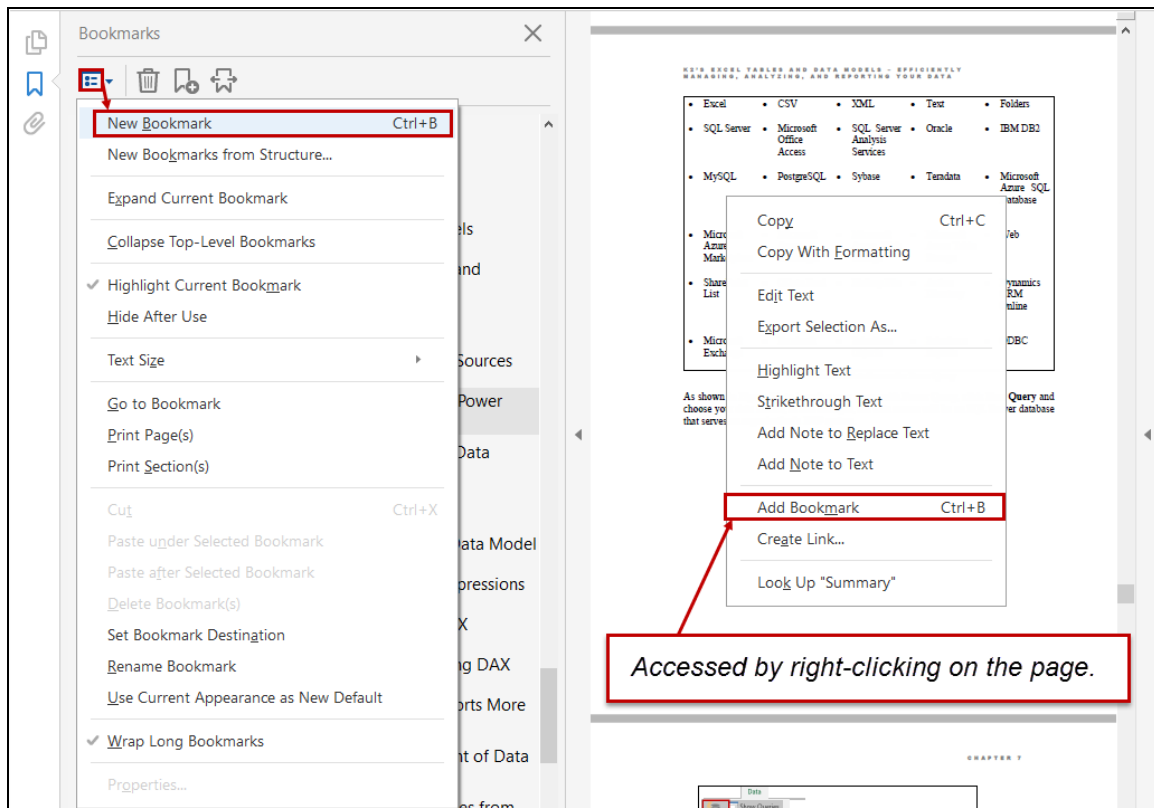


Figure 44 – Manually Creating a Bookmark

Use this process to create a bookmark to open another document or web page or take other actions.

1. Create a new bookmark in the **Bookmarks** panel and rename the bookmark as desired.
2. Right-click on the bookmark and select **Properties**.
3. In the **Bookmark Properties** dialog box, click on the **Actions** tab.
4. In the **Actions** box, select **Go to a page in this document** action that was automatically created and click **Delete**.
5. In the **Select Action** drop-down menu, note all actions you can link to a bookmark. In this example, select **Open a web link** and then click **Add**.
6. In the **Edit URL** dialog box, type or copy the web page URL to open when selecting the Bookmark. Click **OK** and then **OK** again to complete the process, as shown in **Figure 45**.

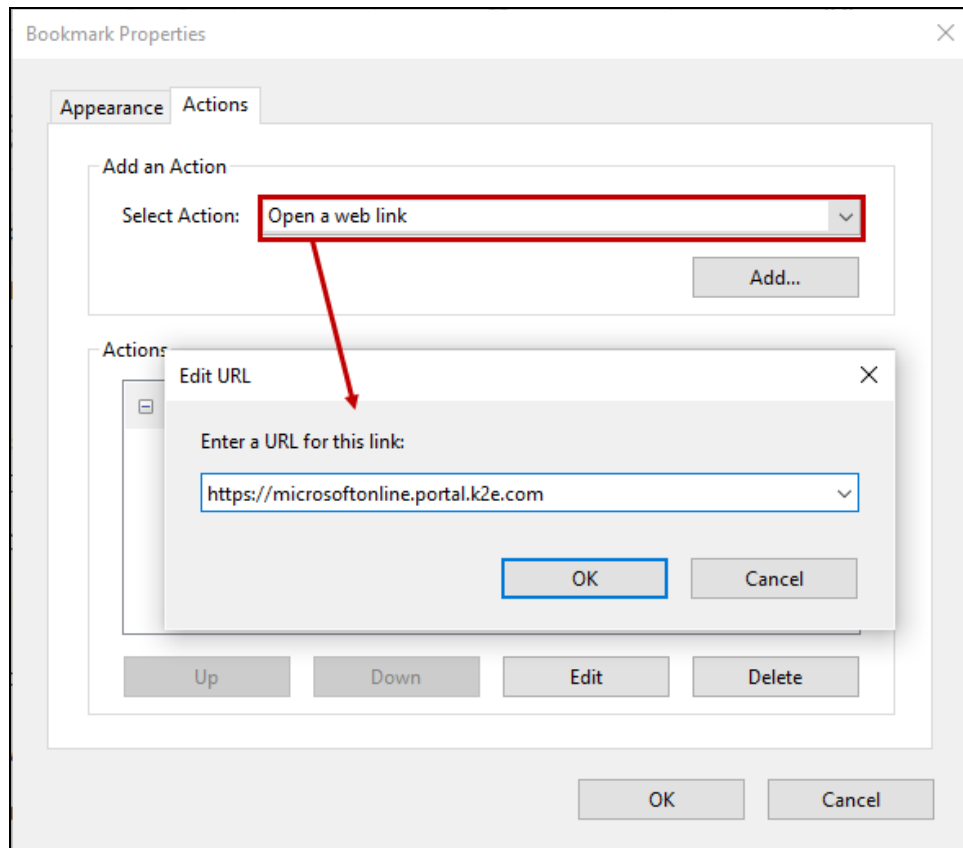


Figure 45 – Configuring a Bookmark to Open a Web Page

The object to which a bookmark is linked is its destination. You can reset a bookmark's destination at any time without recreating the bookmark. First, navigate to a new destination for an existing bookmark. Then right-click the bookmark in the Bookmarks panel and select Set Destination from the context menu. Confirm the action to complete the process. For example, a user could insert a signed signature page into a digital tax return and then delete the unsigned page. Any bookmarks linked to the unsigned signature page would break and no longer function. Rather than creating a new bookmark, naming it, and then repositioning it in the proper order, the user could reset the destination of the existing bookmark to link to the signed page. Recall that you can avoid this process by replacing the page rather than inserting a new page and deleting the old one. Replacing an existing page in a PDF document does not break existing bookmarks.



How can you utilize bookmarks in large PDF documents to speed navigation?
What is the general process for creating bookmarks in PDFs?

Headers and Footers

Acrobat allows users to add headers and footers to PDF documents. The process is very similar to adding headers or footers to a worksheet in Microsoft Excel, with three regions—left, center,

and right—where you can add them. You can access header and footer functionality by selecting **Tools, Edit PDF, Header & Footer**, then choosing the desired action. You can **Add, Update**, or **Remove** an existing header or footer, as shown in **Figure 46**.

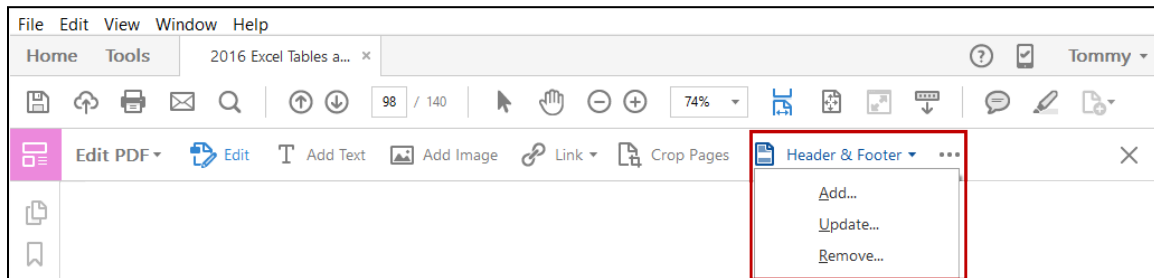


Figure 46 – Header and Footer Menu Selections

The secret to applying headers and footers successfully in Acrobat is to remove them from the source documents. Then, after converting source documents to PDFs, you add headers and footers with pagination in Acrobat. Otherwise, the headers and footers created in Acrobat will overwrite those from the source document during the conversion.

Acrobat provides a full range of header and footer functionality, available within the **Add/Update Header and Footer** dialog box shown in **Figure 47**. You can add page numbers and format headers or footers independently of the source document. For example, you can specify header and footer margins, page number and date formats, and header and footer fonts. In addition, you can apply headers or footers to an entire document or a specified page range. This option allows users to configure Acrobat to use unique headers or footers in different sections of the same document. You can also apply different headers and footers to odd or even pages so that facing pages can have unique headers and footers.

Acrobat provides three productivity-enhancing features in its header and footer functionality.

1. After adding them to the document, a **Preview** pane at the bottom of the dialog box lets users see how headers and footers will look. This view eliminates the time-consuming trial-and-error of specifying headers and footers.
2. You can apply headers and footers to multiple documents with a single command. To do so, click the Apply to Multiple button, select the files where the headers and footers are to appear, and then click **OK** to complete the process.

- Header and footer settings can be named and saved to be applied quickly and easily to other documents. Click the **Save Settings** button, type in a name, and click **OK**. You can then use a saved setting to add headers and footers to other PDFs by selecting its name from the drop-down menu in the **Add Header and Footer** dialog box.

Figure 47 – Add Header and Footer Dialog Box

Watermarks and Backgrounds

A watermark is an image or text that appears above or behind existing document content. For example, accounting professionals may want to apply a “Confidential” watermark to pages with sensitive information. You can add watermarks to a page or a range of pages. Further, you can add multiple watermarks to a single PDF. To add a watermark to a document, select **Watermark** from the **Edit PDF** menu, then choose **Add Watermark** from the menu, as shown in **Figure 48**.

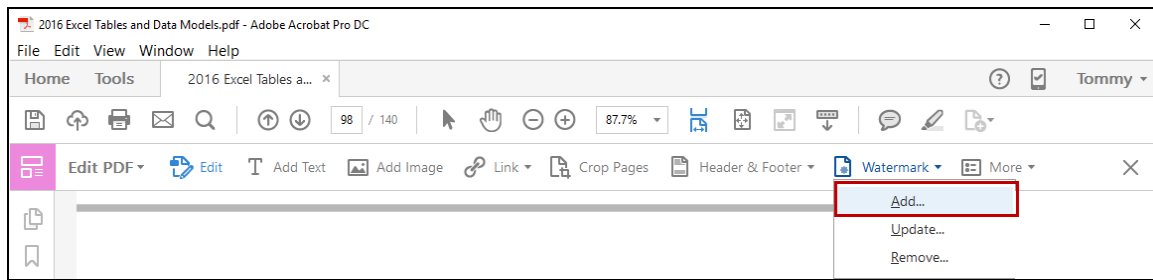


Figure 48 – Creating Watermarks

You can customize the watermark's format, including its font, rotation, and opacity. The settings can be applied to multiple files with a single command, and the settings can be named and saved for future use.

Backgrounds are solid colors or images appearing behind the text or images on a page. Like watermarks, you can apply them to a single page or a range of pages in a PDF. Select **Tools, Edit PDF, More, and Background** to add a background to a PDF. You can customize a background's format—color, image, or opacity—to meet your needs. The settings can be applied to multiple files with a single command, and the settings can be named and saved for future use.

Attachments

You can attach multiple files of any type – PDFs, Microsoft Office Excel workbooks or Word documents, QuickBooks company files, for example – to a PDF. This feature may be helpful in a variety of circumstances. For example, when archiving PDF documents for long-term storage, some users attach source documents to their PDFs, so access to the source, not just the document image, is available in the future. In addition, there is only one file to maintain and administer, as the source files are embedded in the PDF. Another example is when users submit completed PDF forms, such as expense reports, to accounting staff. The supporting expense receipts can be scanned and attached to the PDF form. This workflow reduces paper, speeds up the process, and reduces the number of files to maintain and administer by accounting.

To attach files to a PDF, follow these steps.

1. Select **Tools, Edit PDF, More, and Attach File**. Alternatively, expand the **Attachments** panel in the **Navigation Pane**, click the **Add** or **Options** button, and select **Add Attachment**. Then, select one or more files in the **Add Files** dialog box and click **Open**.
2. To add or edit a description for an attached file, select the file in the **Attachments** panel, click the **Options** button, and then select **Edit Description** from the menu. Next, type in a description and click **OK** to complete the process.

Miscellaneous PDF Techniques

Chapter

4

In addition to creating and managing PDF documents, you will likely need to be proficient with several other techniques to succeed when working with PDFs. For example, applying comments and markups is useful when editing and reviewing PDFs. Likewise, securing sensitive information in PDFs is virtually mandatory in today's business climate, and creating PDF forms can be a valuable timesaver. In this chapter, you will learn about these features and how to work with them.

Learning Objectives

Upon completing this chapter, you should be able to:

- List and apply the various markup tools in Acrobat and use each to annotate and mark up PDF documents;
- Add and edit text in a PDF document;
- Define Reader extensions and how to enable them;
- Apply fundamental security techniques to a PDF; and
- Create simple fill-in forms using PDF technology.

Annotations

All the comment and markup tools are available by clicking **Tools, Comments** to open the **Command** toolbar shown in **Figure 49**.

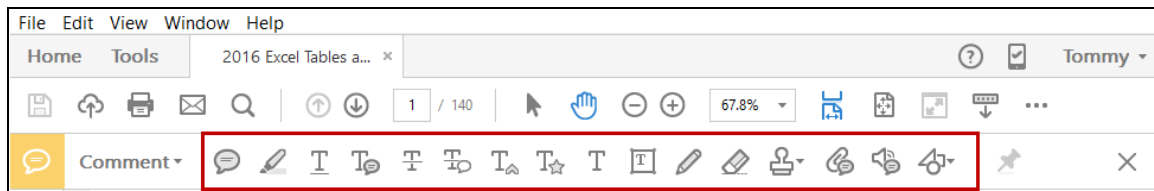


Figure 49 – Comment & Markup Tools

Fundamental Commenting and Markup Tools

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 ways to annotate 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 default yellow border. 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.

By 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 50**. 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.

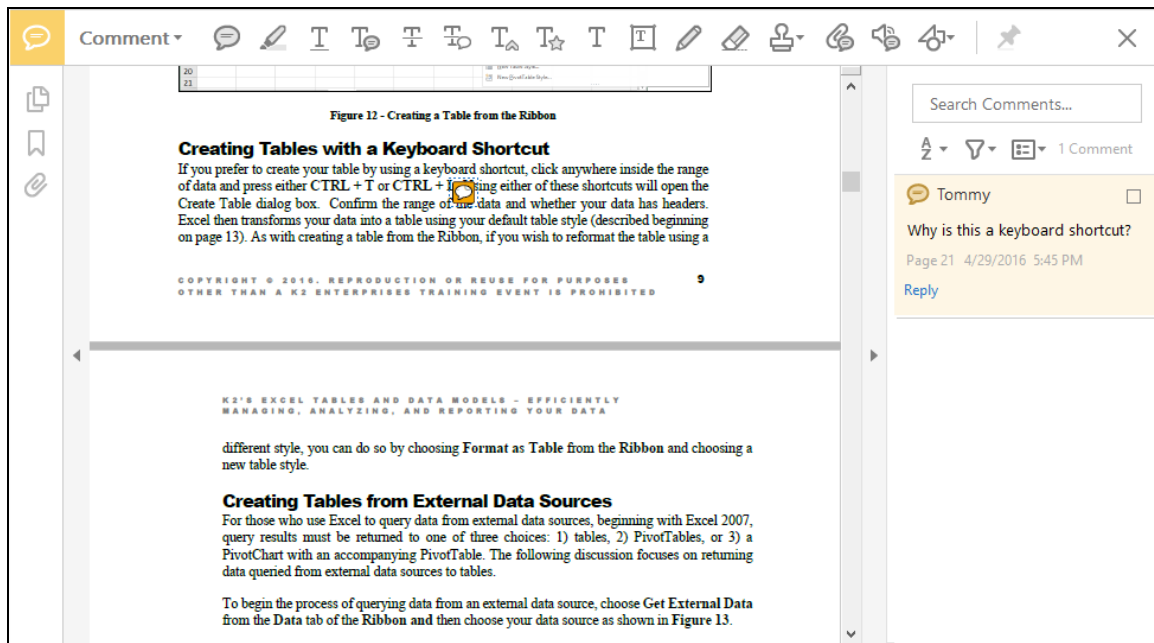


Figure 50 – Working with Sticky Notes

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 their notes, making the color 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, then select **Reply** from 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. Replies to previous replies appear in the **Comments List**. Acrobat links these replies at the bottom border of the initial reply in a thread.

Setting Commenting Preferences

Acrobat allows users to set their commenting preferences. To set these preferences, select **Edit** and **Preferences** from the menu. Then, in the **Preferences** dialog box, click **Commenting** in the Navigation Pane on the left to display the commenting choices in the pane on the right, as shown in **Figure 51**.

Several settings deserve special consideration. The first is the font used for viewing comments. Use the drop-down menu to select the desired font and font size. Note that this setting only affects how comments display in note boxes such as Sticky Note, Replacement Text, and Inserted Text boxes. This setting does not affect text entered into callouts or text boxes. You can select settings based on your personal needs. The text used to display comments in note boxes is independent of the settings used by other reviewers, even those of the user who created a particular comment. For example, when Mary reviewed a PDF document, she annotated several sections with Sticky Notes. She had set her viewing preferences to 12pt Times Roman. Betsy, who participated in the review, had her viewing preferences set to 14pt Arial to make the comments easier to read. Mary's comments would display to Betsy in 14pt Arial, consistent with her personal viewing preferences.

A second setting that deserves more consideration is the checkbox that determines which name appears as the author of comments created by the user. By default, the **Always use Log-in Name for Author name** option is enabled, so a user's Windows account name is displayed. If a user wants a more formal name to display, such as *Robert Jones*, instead of a less formal Windows account name like *Bob*, they should clear this checkbox.

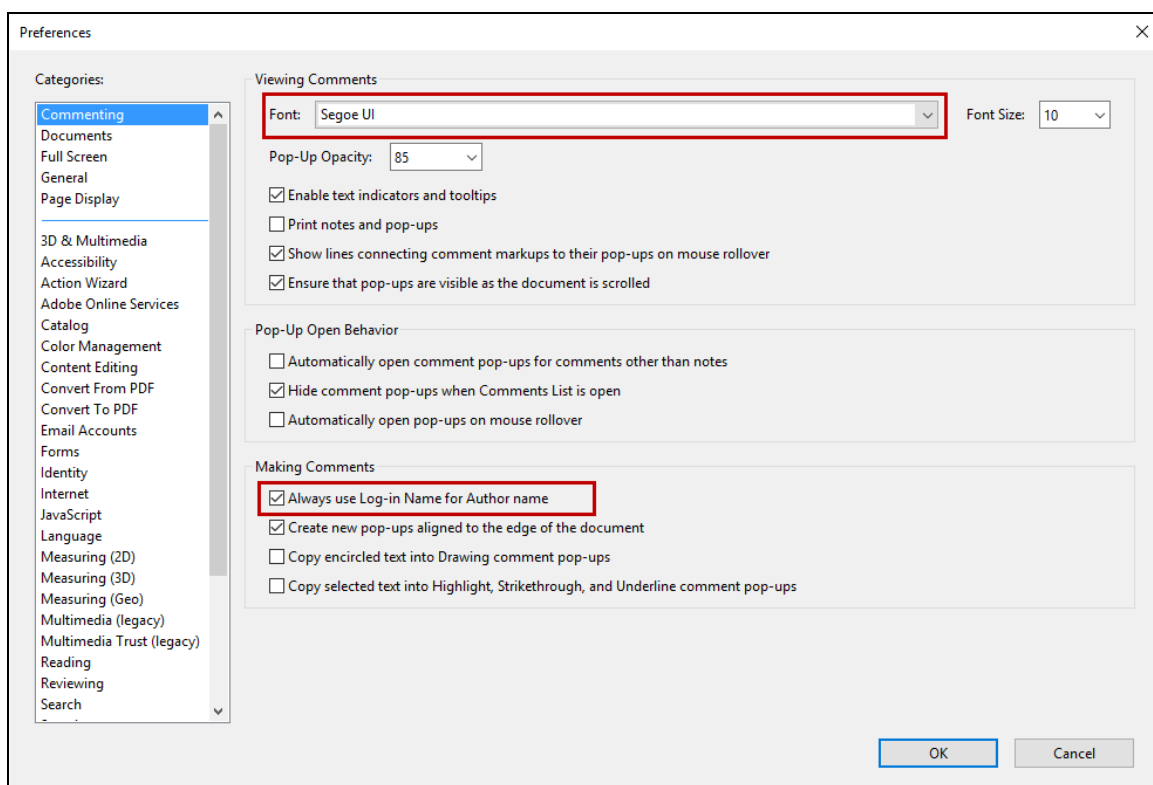


Figure 51 – Modifying Commenting Preferences

The properties of individual commenting and markup tools can be modified using the **Properties Bar**. To display the Properties Bar, press **CTRL + E**. With the Properties Bar displayed, you can adjust the settings of any selected comments or markups. Further, you can set the adjusted

settings as the default for a selected tool, as illustrated earlier with Sticky Notes. This action allows users to customize the look and feel of any commenting and markup tool. Note that the properties are different for each type of comment or markup, as shown in **Figure 52**. If you select a tool on the **Comment & Markup** toolbar, the Keep Tool Selected checkbox is also accessible on the **Properties Bar**.

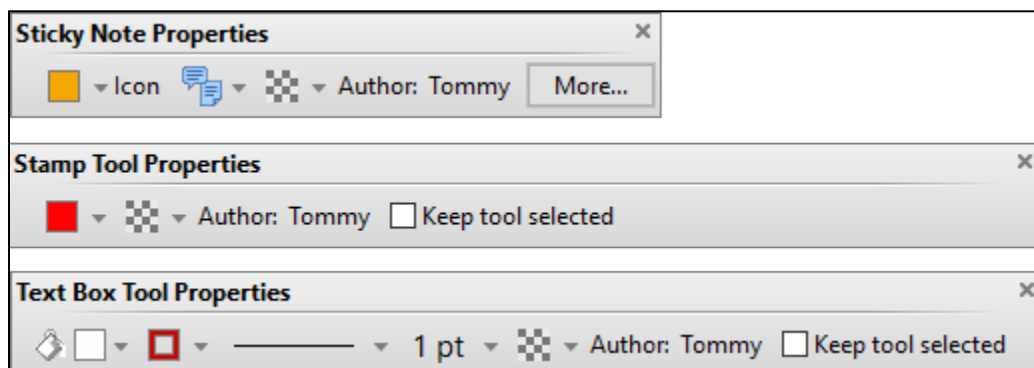


Figure 52 – Properties Displayed Depending on Comment and Area Selected

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 53**. 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.

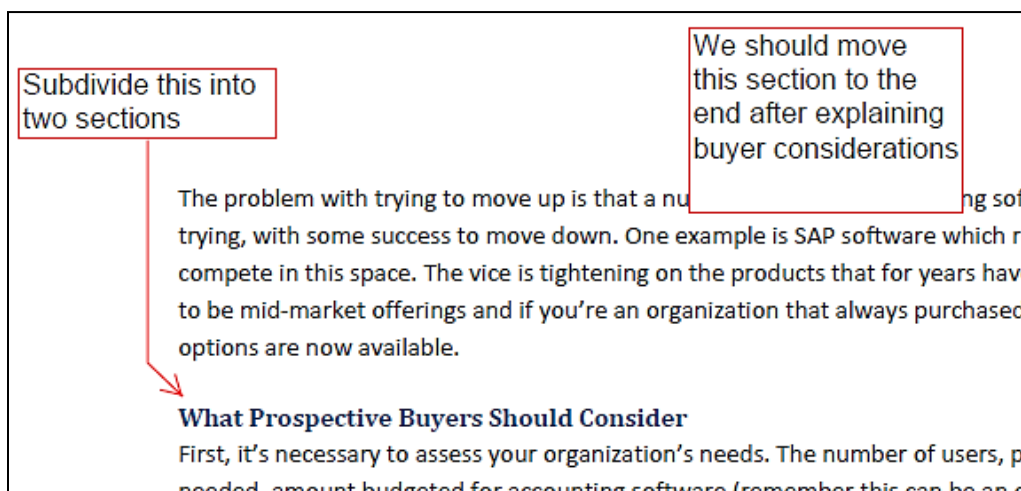


Figure 53 – Text Boxes and Callouts

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 53.

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 54**. 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**.

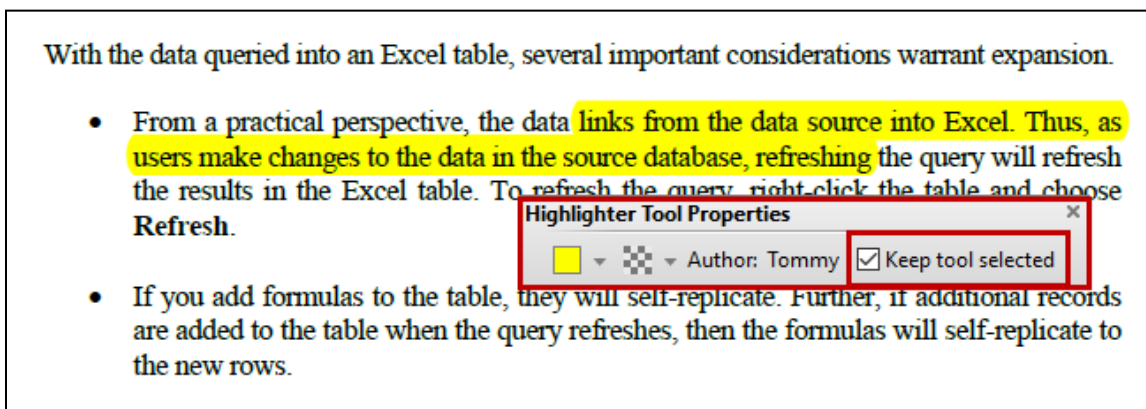


Figure 54 – Using and Configuring the Highlighter

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 55**.

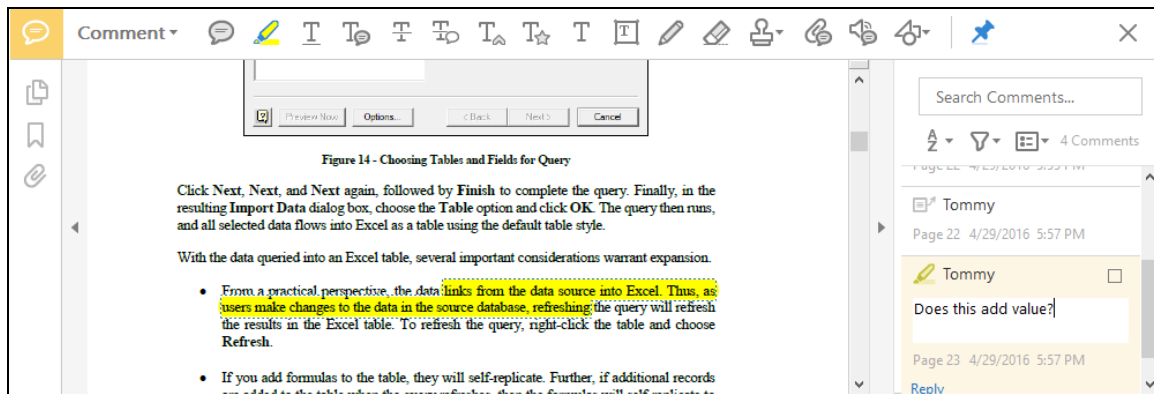


Figure 55 – Associating an Explanation with Highlighted Text in the Comments List

File and Audio Comments

If text boxes and callouts are insufficient to handle the task, you can attach audio and video files as comments. This action allows users the flexibility of using a word processor to compose and format comments. The tool to attach a file as a comment is available by choosing the **Comments** toolbar and selecting **Attach File**. Click the location in the document to anchor the comment, select the file in the **Add Attachment** dialog box, and then click **Open**. In the **File Attachment Properties** dialog box, choose an icon and icon color to represent the file in the document and click **OK** to complete the process, as shown in **Figure 56**. You may attach any file type, but reviewers must install the appropriate application to access the file. To open the file, double-click on the icon.

Just as you can attach files containing written comments, you can record and attach audio comments to a PDF document. This action is helpful when an individual reviews a document and gets called away from their desk in the middle of the process. A brief audio note explaining her thoughts will reduce the time necessary to refocus on the issue when she returns and continues the review. To add an audio clip, choose the **Comments** toolbar, and select **Record Audio** to attach an audio clip. Next, click on the location in the document to anchor the comment, click **Record** in the **Sound Recorder** dialog box, dictate the note, and then click **Stop Recording**. Finally, in the **Sound Attachment Properties** dialog box, choose an icon and icon color to represent the file in the document and click **OK** to complete the process, as shown in Figure 56. To listen to the recording, double-click on the icon.

- **Author** – the Author is the person who created the form file. There is only one Author per form. Authors can modify a form, modify the data in the Responses view, and delete any forms they've created. An Author can add others to the form as Co-author, Contributor, or Reader. 
- **Co-author** – a Co-author has the same rights as an Author, but cannot delete forms. Co-authors can add other users to the form.
- **Contributor** – Contributors have read-only access to a form. A Contributor can modify the data in the Response table, but cannot edit the form itself or edit distribution settings. Contributors can export data from a Response table; use a private view; or filter, search, or sort the collected data. 

Figure 56 – Attaching a File or Audio Clip as a Comment

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 57**. 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 display or hide its note.

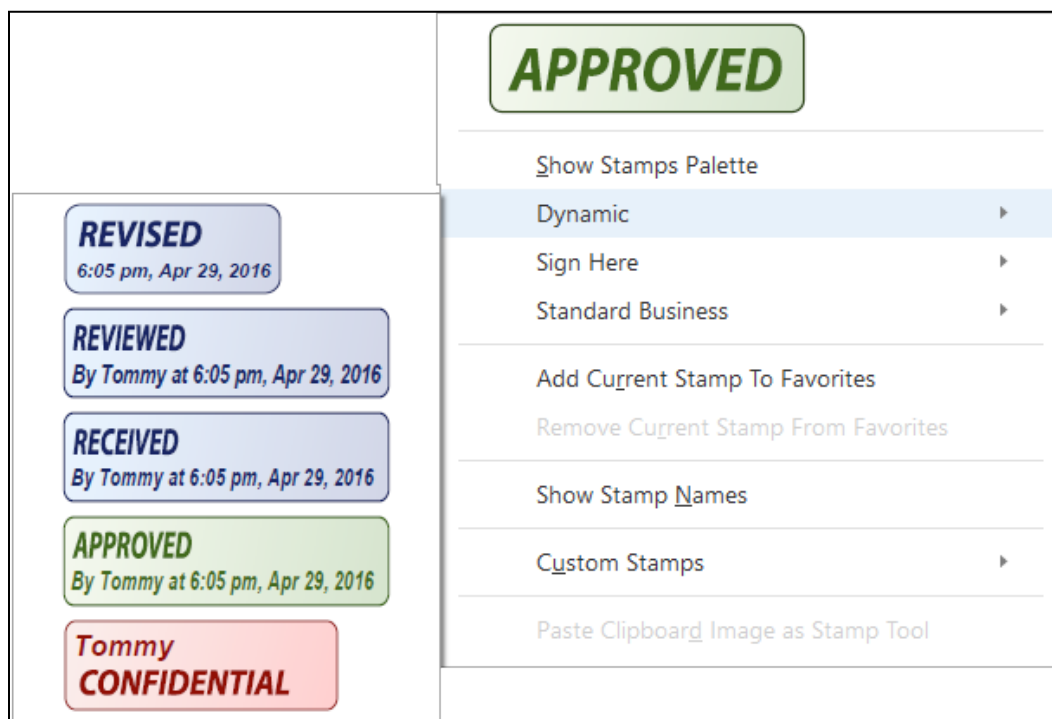


Figure 57 – Standard Business Stamps Available in Acrobat

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. Resize or reposition the stamp as required.

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 58**. Next, select the appropriate stamps group from the drop-down list. To apply a stamp, click on the stamp in the **Stamps Palette** and then click on the document face, using the process previously described. Resize or reposition the stamp as required.

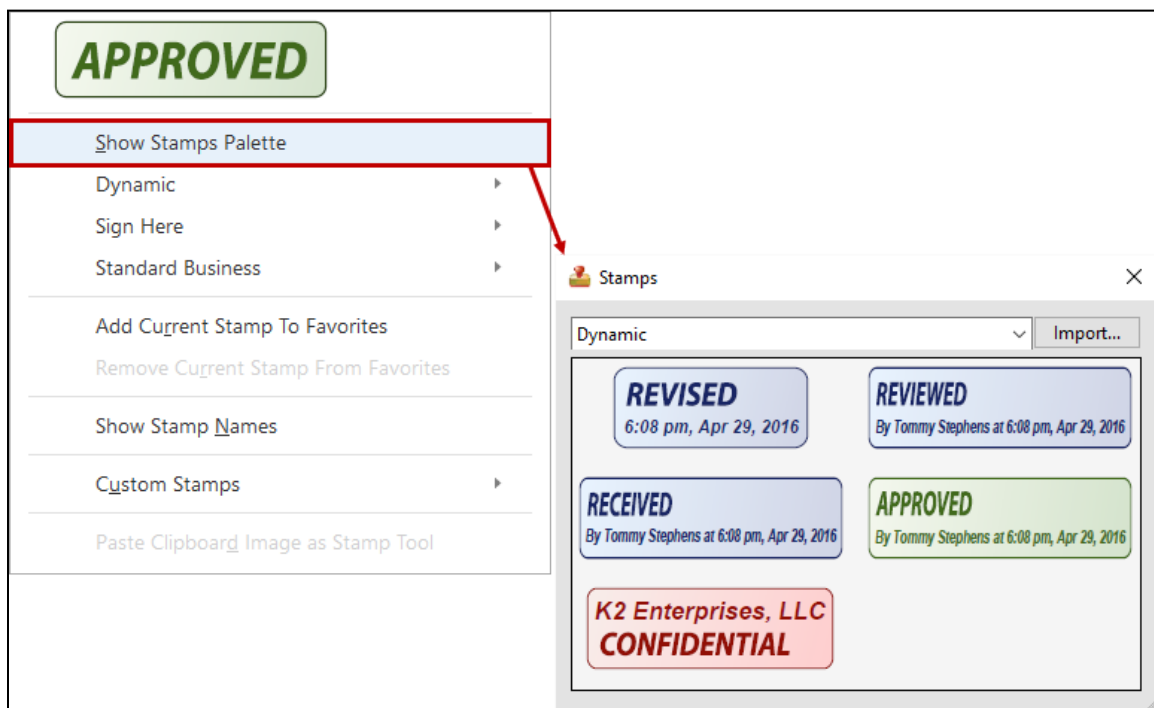


Figure 58 – Acrobat Stamps Palette

Reapplying Stamps

As users process documents by applying stamps, the need to reapply the same stamp often arises. There are several methods for dealing with this issue other than repetitively selecting and applying a stamp from a menu.

1. Use the **Stamps Palette** – While this requires repetitively selecting and applying a stamp, the Stamps Palette can be positioned in the document while working to make the task easier and less time-consuming.
2. Add a stamp to **Favorites** – Acrobat allows users to identify stamps they use most often as **Favorites**. First, select a stamp in a document to add to the Favorites group. Then, with

the stamp chosen, click the drop-down arrow on the **Stamp Tool** icon and select **Add Current Stamp to Favorites**. Adding a favorite modifies the top-level Stamp Tool menu to include favorite stamps, as shown in **Figure 59**. This action reduces the effort required to apply a frequently used stamp.

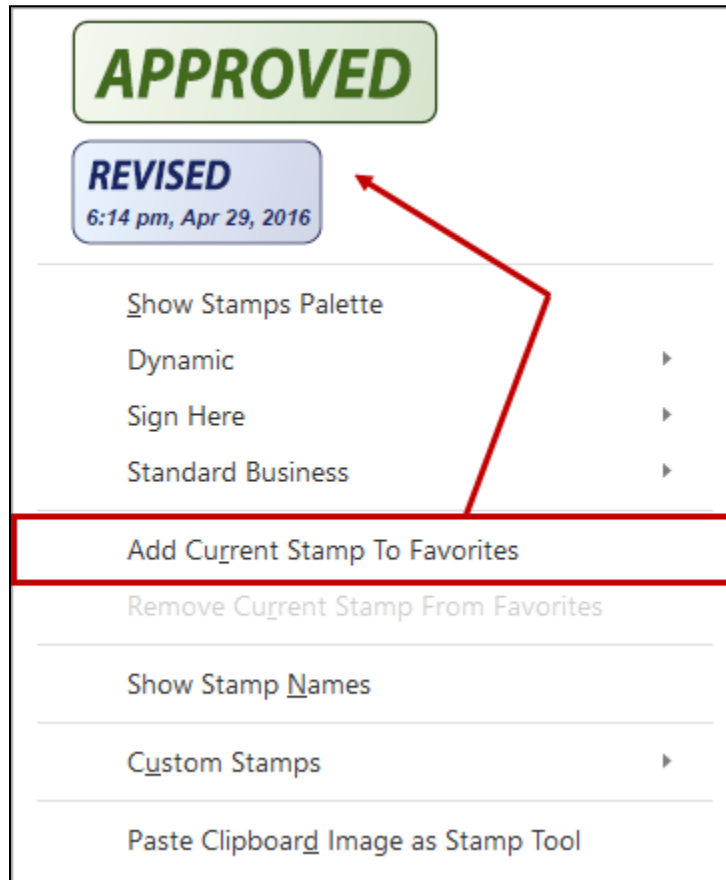


Figure 59 – Favorites on the Stamp Tool Menu

To remove a favorite, click on a stamp in a document. Then, with the stamp selected, click the drop-down arrow on the **Stamp Tool**, choose **Favorites**, and **Remove Current Stamp from Favorites**.

3. Access **Stamp Tools Properties** by selecting a stamp and pressing **CTRL + E**. Check the box labeled **Keep tool selected**; the stamp will stay active until you change the properties. This procedure is the most efficient and effective method for applying a stamp repetitively. After choosing a stamp, you can use it multiple times. When the task is complete, press **ESC** to cancel the stamp.

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 place 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.

Enabling Reader Extensions

Not only can you use the commenting tools illustrated in this chapter in Acrobat Standard and Pro, but you can also use most of them in the free Adobe Reader. Users of Acrobat Pro can extend Adobe Reader's capabilities to process PDF documents. Although Reader cannot perform all Acrobat Standard and Pro tasks, it can handle many of them. This capability allows accounting professionals to send PDF documents to their clients for review, signature, or other action, and clients can fulfill the requests with Reader. For large offices, another consideration is the cost of resourcing staff members with Acrobat. Adobe Reader is free, and if you can enable most of the needed features in Reader, this feature can result in significant cost savings. Acrobat Pro and Pro Extended can enable Reader for two levels of extended functionality.

To enable the full range of functionality in Reader, you must save the PDF as a Reader Extended PDF. To do this, select **File, Save As Other, Reader Extended PDF**, and then choose the level of additional capability you desire. **Figure 60** illustrates the steps for creating a Reader Extended PDF. Unfortunately, this capability is not available in Acrobat Standard.

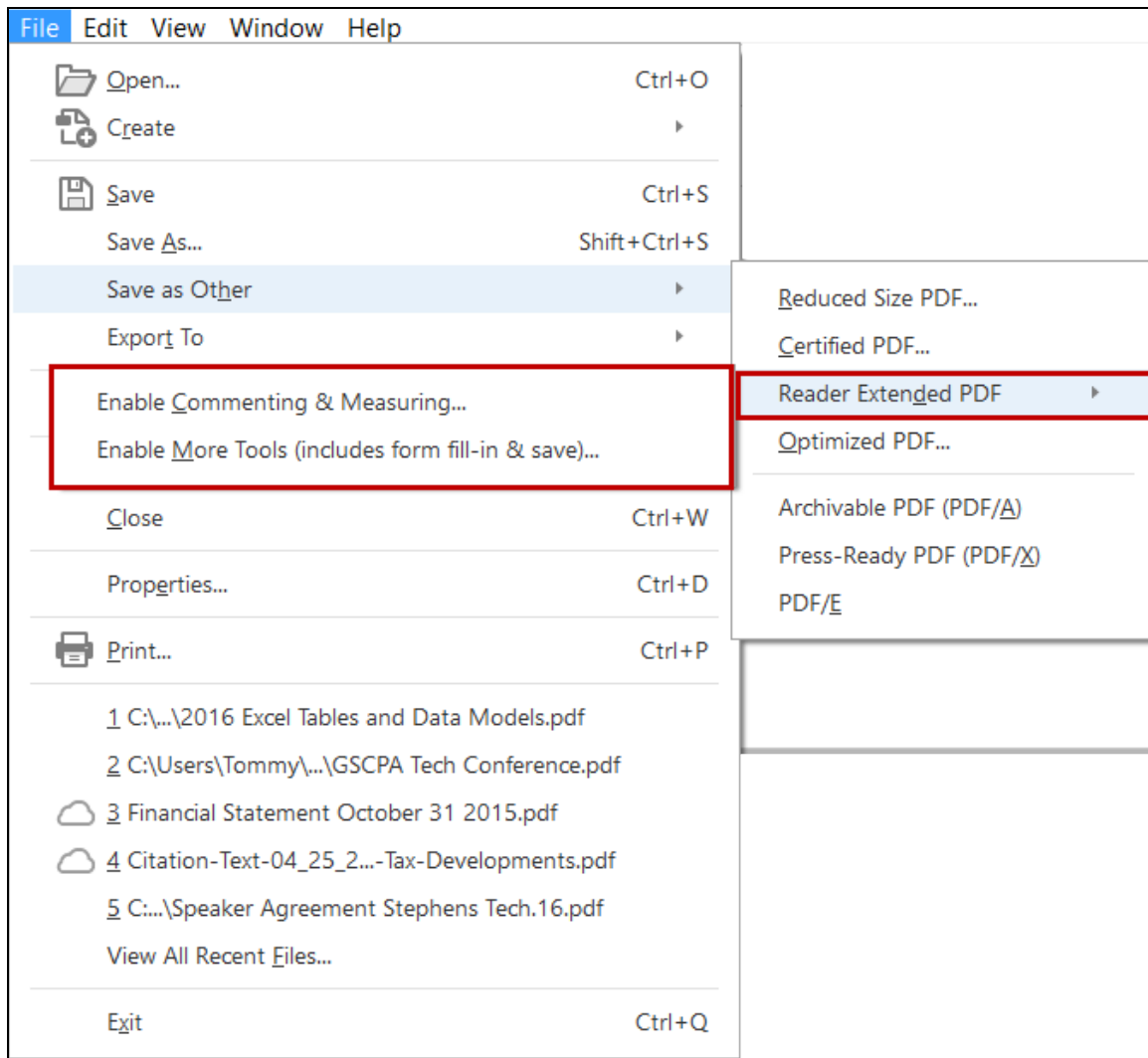


Figure 60 – Extending Features in Adobe Reader

The extension of capability only affects the document in which it was enabled.

Securing PDF Documents

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 61**. 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.

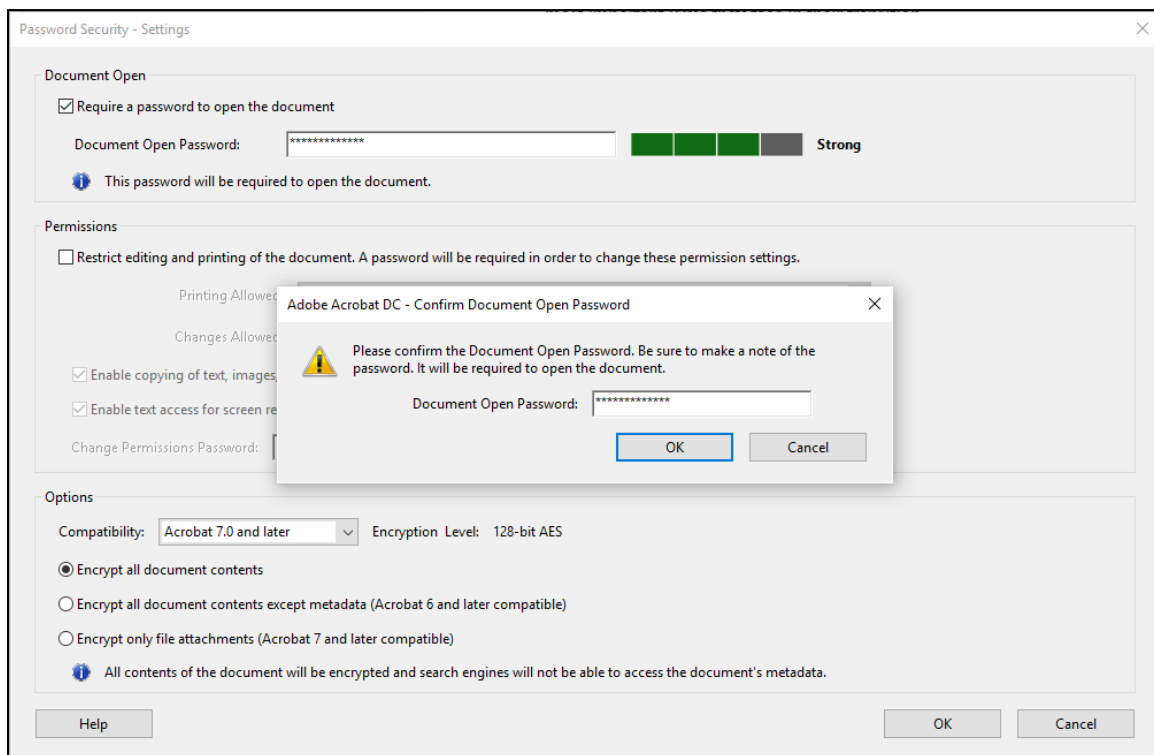


Figure 61 – Password Security – Settings

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 important, 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 **Enable text access for screen reader devices for the visually impaired**.
- 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 62**.



What are the primary differences between the two types of passwords that you can apply to a PDF document? What is the significance of the encryption capabilities associated with a Document Open Password?

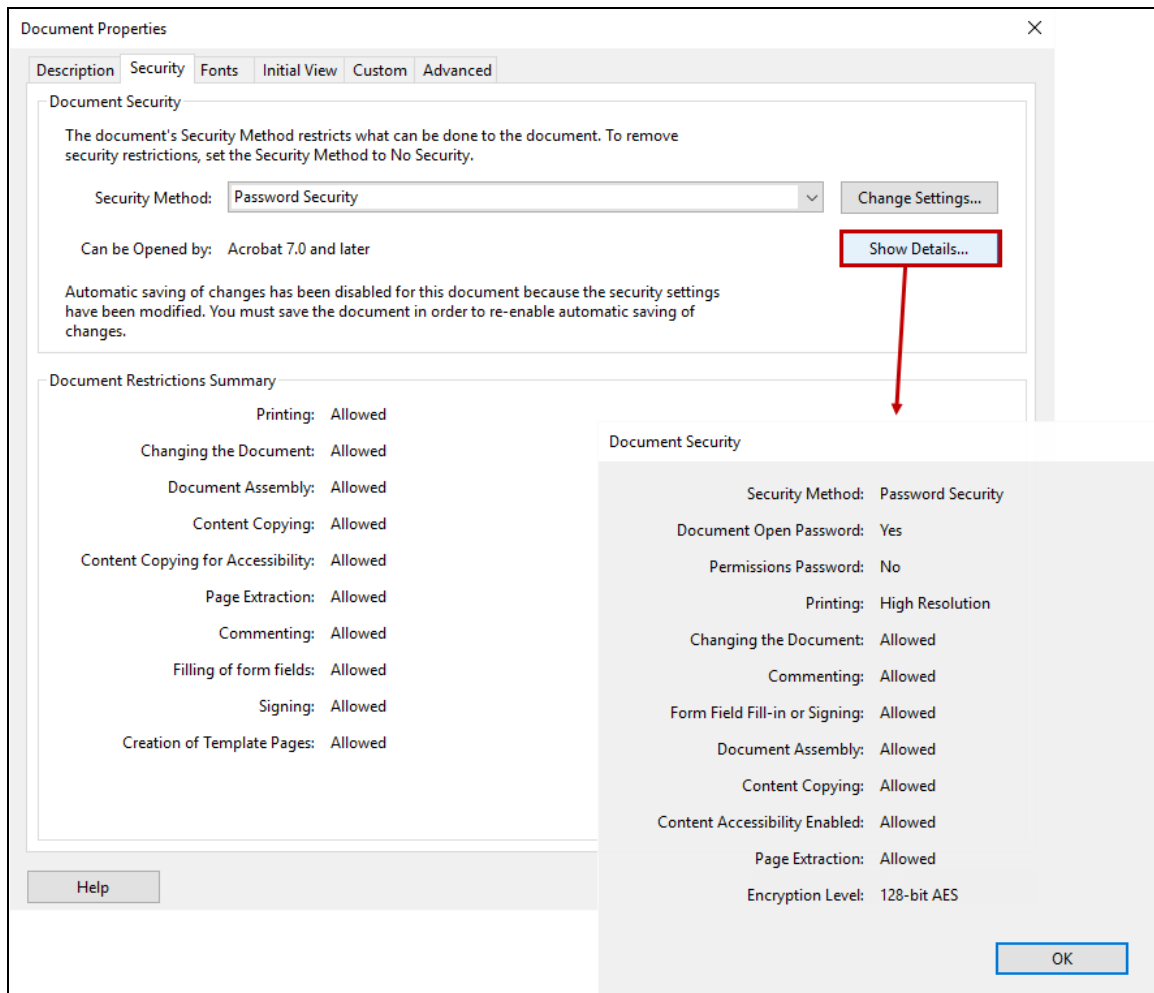


Figure 62 – Reviewing Document Security Settings

Redacting Sensitive Data

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 redact. 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 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, choose **Find Text** to open the **Search** dialog box pictured in **Figure 63**. 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.

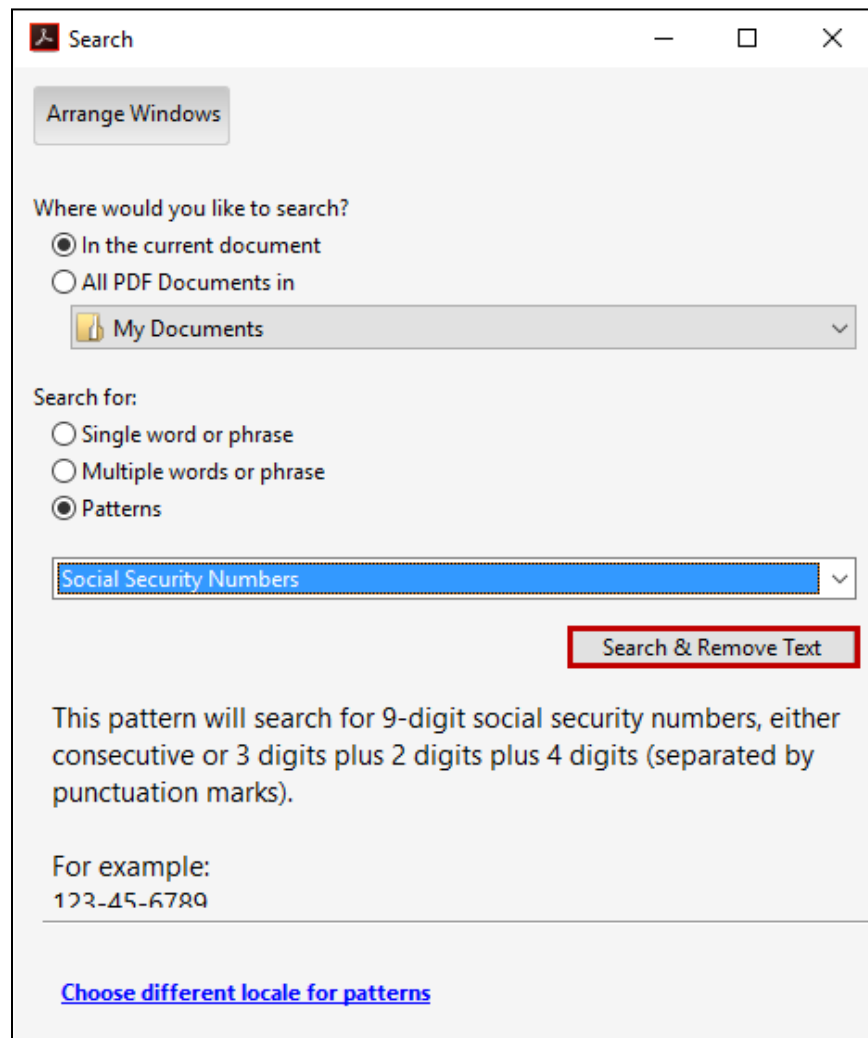


Figure 63 – Accessing the Redaction Tools from the Menu

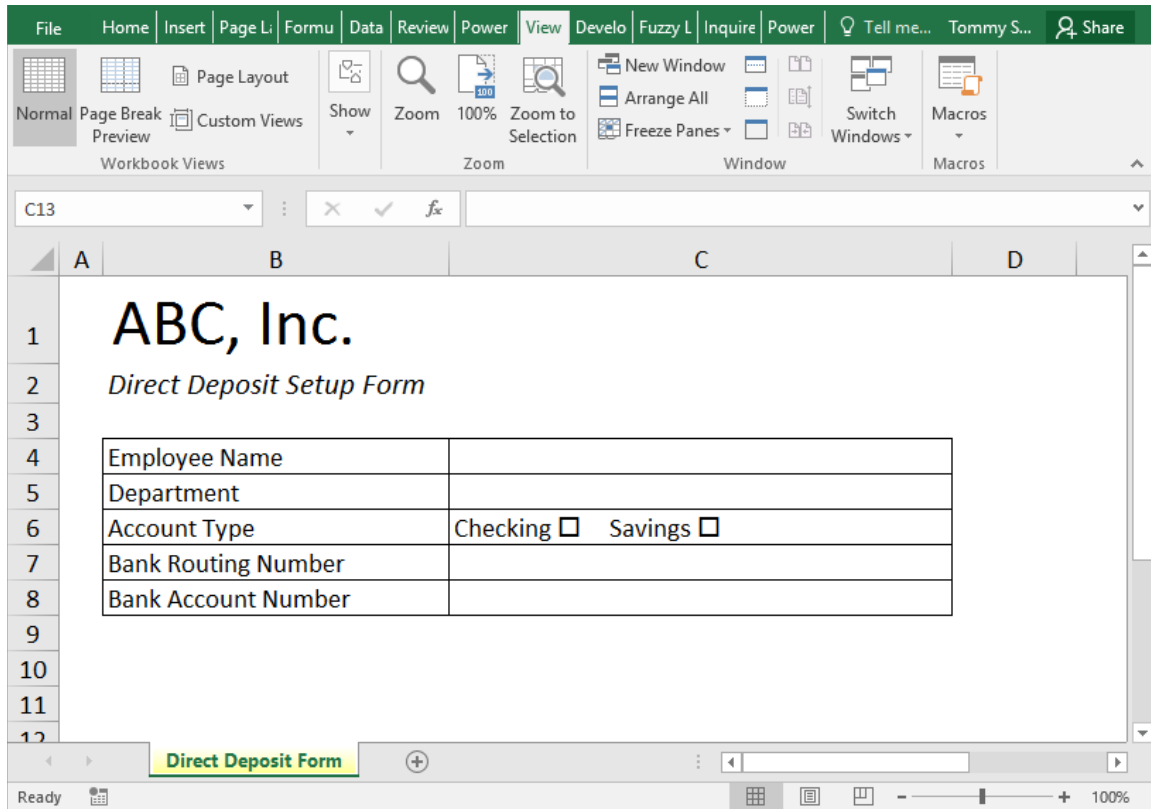
Creating Simple PDF Forms

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.

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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 64**.



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 64 – 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 begin transforming the original document into a fillable form, as shown in **Figure 65**.

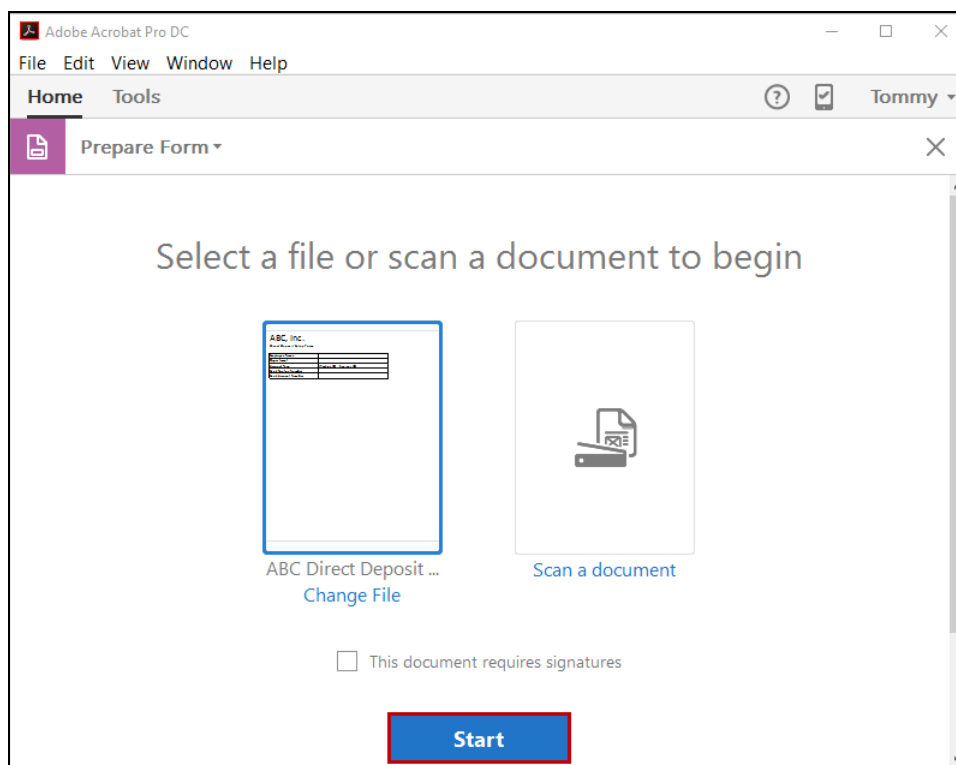


Figure 65 – Selecting and Confirming a Foundational Document for Converting to a Fillable PDF Form

3. Acrobat then starts the conversion process and, as shown in **Figure 66**, displays a draft of the fillable PDF form upon completion.

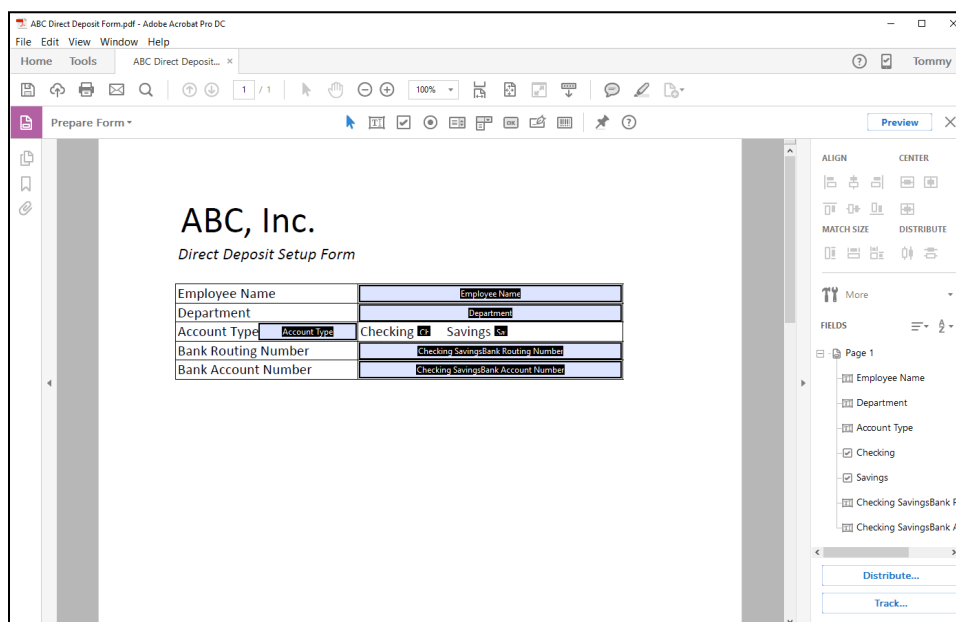


Figure 66 – Selecting a File for Converting to a PDF Form

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 67**. 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 SavingsBank Routing Number
Bank Account Number	Checking SavingsBank Account Number

Figure 67 – 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 68**, 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	
Department	
Account Type	Checking ☒ Savings ☐
Bank Routing Number	
Bank Account Number	

Radio Button Choice: ①
 Checking ☒
 Group Name: Account Type
☒ Required field [All Properties](#)
 ⚠ Warning: 1 button in group. At least 2 buttons needed.
[Add Another Button](#)

Figure 68 – 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 69**.

FIELDS

- Page 1
 - Employee Name
 - Department
 - Checking SavingsBank R
 - Checking SavingsBank A
 - Account Type**
 - Checking
 - Savings

[Distribute...](#)
[Track...](#)

Figure 69 – 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 70**.

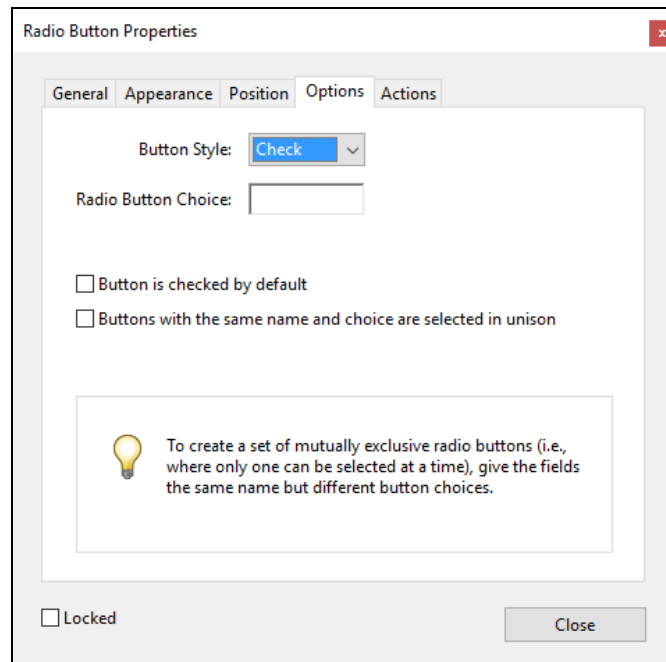


Figure 70 – Changing a Radio Button's Appearance

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 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. When working with a form, you can access these tools by clicking **Distribute and Track** near the bottom of the forms task pane on the right side of the window.

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 document. Once the field recognition process completes, you can perform any necessary edits and corrections to finalize your PDF form.