



Adobe® Acrobat® XI



# CLASSROOM IN A BOOK®

The official training workbook from Adobe Systems

Instructor Notes

Adobe® Acrobat® XI Classroom in a Book®

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# INSTRUCTOR NOTES

## Getting Started

The Adobe® Acrobat® XI Classroom in a Book® course presents students with tips, techniques, and solutions for using the Adobe Acrobat XI software. The Instructor Notes are intended to complement the information in *Adobe Acrobat XI Classroom in a Book*.

The information is organized to follow the sequence of instruction in each lesson.

## Course strategy

If you're teaching a 15-session class, you can teach approximately one chapter of this book per class. The book contains 13 lessons, some of which may take a while to complete. If you are teaching a 10-session class, you may want to combine some of the lessons in a single class or make some of the lessons optional. For example:

- Lessons 4 and 5 cover enhancing and editing PDF files.
- Lesson 6 requires Microsoft Office for Windows applications. If students don't use Microsoft Office, or work exclusively on Macintosh computers, they can skip lesson 6.
- Lessons 10 and 11 cover form creation and distribution. Lesson 10 focuses on forms in Acrobat, and is applicable to both Acrobat Pro and Acrobat Standard. Lesson 11 helps students work with Adobe FormsCentral, which is installed with Acrobat Pro.
- Lessons 11 and 12 require Acrobat Pro, as do much of Lesson 13, portions of Lesson 3, and a few other exercises in the book. If students are using Acrobat Standard, you won't be able to complete these lessons.

## Managing student projects

One way to simplify file storage and retrieval in classroom situations is to ask students to create a folder on their hard disks, name it [*student's name*] Lessons, and then copy each project folder into the main Lessons folder. Having students keep all their working files in their own Lessons folder makes it easy for you to clean up files when a class is over.

# Lesson 1: Introducing Adobe Acrobat XI

The first lesson presents an overview of the Adobe Acrobat XI software, as well as Adobe Reader. The lesson gives students a tour of the work area, pointing out the menu bar, task pane buttons, toolbars, and basic navigational elements. This lesson also demonstrates different ways of viewing PDF documents, including Full Screen mode and Read Mode. Students gain experience with the most basic and commonly used features, as they get to know their way around the work area. They'll have the chance to see features in action, by rotating a page, adding a bookmark, and adding a comment. However, the main goal of this lesson is to help students know where tools and navigational options are located so that they can successfully work through the remaining lessons.

## Goals for this lesson

How much time you should schedule for this lesson depends on whether your students already have any knowledge of Acrobat and PDF documents, and on their computer skills in general. The overall objective for Lesson 1 is to help them become comfortable with Acrobat, which is an unusual application, in that you rarely create an original document in Acrobat. In general, they should be able to do the following:

- Describe the difference between Acrobat and Adobe Reader.
- Identify and name the key areas of the interface, including the menu bar, task panes and their panels (in general), and the toolbars.
- Identify several advantages to working with Adobe PDF documents.
- Enter and exit Read Mode.
- Find common tools in the Tools pane.
- Display comments in the Comments pane.
- Customize the Quick Tools toolbar.
- Navigate a PDF document using a variety of methods.

## About PDF

Most students have probably received, opened, and printed PDF documents. However, they may not understand what PDF documents are or what benefits they offer. To provide context for students, ask them about PDF documents they've used in the past. For example, some may have downloaded federal tax forms as PDF files, or they may have read PDF documents online.

## About Acrobat

Acrobat is an unusual application, and it can be challenging for students to understand how it differs from the applications they usually work with. Emphasize that when you're creating a PDF document, you're actually *converting*—or digitally printing—an existing document that was created in some other application. Once the file has been converted to PDF, you can read it, edit it, and make other changes to it in Acrobat.

## About Adobe Reader

Emphasize the difference between Adobe Acrobat, which is the full application that lets you create and edit PDF documents, and Adobe Reader, the free application that lets you read PDF documents. While each version of Adobe Reader includes additional features, it remains primarily a reader application, designed to allow anyone, on any computer, to read a PDF document.

## Working with the toolbars

Point out the differences between the Quick Tools toolbar and the Common Tools toolbar so that students know how to find the tools they're looking for quickly. The Quick Tools toolbar contains buttons for tools that actually change the PDF document; the Common Tools toolbar contains buttons that help you navigate a PDF document without changing its content.

## Same tools, different locations

Ask students whether they've used Acrobat 9 or earlier versions of the application. If they have, spend some time comparing the user interfaces. If students are brand new to Acrobat XI or have only used Acrobat X previously, changes in the user interface don't affect them.

For students who are familiar with earlier versions, note that the Acrobat XI work area is very different from that in Acrobat 9. The sidebar on page 14 illustrates how taskbars in Acrobat 9 match up with panels in Acrobat XI. Invite students to open menus in Acrobat XI to see that there aren't many menus and they aren't very comprehensive. Next, have them open all the panels in the Tools pane. They'll see many tools there that were menu commands in earlier versions. Remind them to look in the Tools pane first when they have difficulty finding a tool.

## Panels in the Tools pane

The lessons in this book cover both Acrobat XI Standard and Acrobat XI Pro. Several panels are available only in Acrobat Pro. Additionally, many panels aren't displayed until you specifically select them. If students are using Acrobat Standard, remind them that their screen may look different from the images in the book, which are all shown in Acrobat Pro.

To add a panel to the Tools pane, select it in the Show Or Hide Panels menu in the Tools pane, or choose View > Tools > [panel name].

## Using keyboard shortcuts to select tools

Students may be disappointed by the number of tools and commands in Acrobat that do not have keyboard shortcuts. Remind them that they can customize the Quick Tools and Common Tools toolbars to provide quick access to tools they use frequently. Also, point out that Acrobat is not an application where you type large amounts of text or edit images, so even those who are used to keeping their hands on the keyboard in other applications may find it just as easy to use a mouse in Acrobat.

Where keyboard shortcuts are available in Acrobat, encourage students to use the panels, toolbars, and menu commands while they are learning features. When they are more comfortable with a feature, they can switch to using its keyboard shortcut if one is available.

## Navigating PDF documents

There are many ways to change pages or views in a PDF document. As students work through the exercises on changing magnification, accessing specific pages, using bookmarks, and splitting the view of a document, ask them to consider real-life examples of when they would use each technique. For example, bookmarks are especially useful when navigating a long document with clear chapters or other definitive headings, while changing magnification may be essential to view a document on a small screen or one that uses small type, such as a legal document.

## Viewing PDF files in Read Mode

In Read Mode, most of the user interface is hidden, so that the reader can focus on the content of the PDF document. To navigate in Read Mode, move the pointer over the lower area of the document, and then click buttons in the semi-transparent floating toolbar.

Point out to students that when you open a PDF file within a web browser, it may open in Read Mode, so it may not even be apparent to readers that they're reading a PDF document.

## Designing documents for online viewing

You can take the discussion further by bringing in printed materials, such as brochures and catalogs, and asking students to consider how they could be adapted for online viewing. Ask them to consider landscape vs. portrait orientation, font choices, and opportunities for links and bookmarks.

## Customizing the Quick Tools toolbar

If students are working on classroom computers, ask them to think about which tools they might add to the Quick Tools toolbar in Acrobat XI on their own computers. They should consider adding the tools they use frequently, but not adding anything that would clutter up the toolbar unnecessarily. Mention that they can also remove the Delete Page, Rotate Page, or Insert Page buttons on the toolbar if they don't use those tools often.

While you're discussing customizing the Quick Tools toolbar, show students how to customize the Common Tools toolbar, too. To add or remove items from the Common Tools toolbar, choose View > Show/Hide > Toolbar Items > [category] > [tool]. For example, to add the Previous View button to the toolbar, choose View > Show/Hide > Toolbar Items > Page Navigation > Previous View.

## Getting Help

Encourage students to explore Adobe Acrobat XI Help so they are familiar with it as they work through the lessons in class, and especially so that they feel comfortable searching for help when they're working on their own projects.

Point out that they can search only Acrobat Help or a larger set of references, including third-party resources. You may also want to show them how to find tutorials to help them learn more about features on their own.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 What is the difference between Acrobat and Adobe Reader?
- 2 What's the difference between the Quick Tools toolbar and the Common Tools toolbar?
- 3 How can you return to the usual work area from Read Mode?
- 4 How can you split the document view?

## Answers

- 1 Adobe Acrobat is the full application that you can use to create, edit, read, and work with PDF documents. Adobe Reader is a more limited application, designed to let anyone read PDF documents, and it is available free.
- 2 The Quick Tools toolbar contains tools that let you work with or change the content of the PDF document. The Common Tools toolbar contains navigational tools that do not change the content of the file.
- 3 To exit Read Mode, click the Show Main Toolbar button in the floating toolbar, or choose View > Read Mode.
- 4 To split the document view, choose Window > Split.

## Lesson 2: Creating Adobe PDF Files

In most applications, you create a document by choosing File > New. In Acrobat, however, creating a document actually means converting a file from some other application to an Adobe PDF file.

### Goals for this lesson

At the end of this lesson, students should be able to describe multiple ways of creating a PDF file, and they should be able to identify the advantages of different methods.

### Using the Create command

The exercise in the book instructs students to use the Create command to convert a TIFF file to a PDF document. Point out the other options in the Create menu. Students will have a chance to use many of these options later in this lesson and in other lessons.

We provided a TIFF file for conversion because Acrobat can convert it without requiring any other application to be present on the computer. You can invite students to use the Create command to create PDF documents from other files so that they can see that the process is similar, though there are different conversion options available for different file types.

### Inserting a blank page

Ask students to brainstorm situations where they may want to add a blank page into a PDF document. Some examples might be the need to add blank pages to create a clear distinction between chapters in a book, to increase the total number of pages for folios in printing, or to add a notes page to a cookbook or textbook.

### Using PDFMaker

Acrobat PDFMaker combines simplicity with control in the creation of PDF documents from several applications. Students will have the opportunity to use PDFMaker in Lesson 6, creating PDF documents from Microsoft Office applications in Windows. They'll also use PDFMaker later in this lesson to archive email from Microsoft Outlook or Lotus Notes. Additionally, they can use PDFMaker to convert web pages to PDF from Microsoft Internet Explorer, Google Chrome, or Mozilla Firefox.

Note that Acrobat PDFMaker is available only for Windows applications, with the exception of Firefox.

## Using the Print command to create Adobe PDF files

This section is actually two separate exercises: one for students using Windows and one for those using Mac OS. Though you can use the Print command to create a PDF file from any application on either platform, how you do it on each platform is actually quite different.

In Windows, you use the Adobe PDF printer, which is installed with Acrobat, to “print” your application to PDF. There is no Adobe PDF printer in Mac OS, because Mac OS includes PDF creation in its operating system. However, emphasize for students that they should choose Save As Adobe PDF to create Adobe PDF files. Other options create PDF files using the Mac OS defaults, which do not use Acrobat and may result in lower-quality PDF files.

## Reducing file size

The Reduce File Size dialog box provides only one choice—version compatibility. While you can significantly reduce the file size by selecting a different version of Acrobat for compatibility, you don’t have much control over how that reduction occurs.

Show students the additional options available in the PDF Optimizer dialog box, discussed briefly in the “Optimizing PDF (Acrobat Pro)” section of the book. To open the dialog box, choose File > Save As > Optimized PDF.

Some of the PDF Optimizer settings are comparable to the settings that are available when you create a PDF file using Distiller. In most cases, the default settings are appropriate for maximum efficiency—saving space by removing embedded fonts, compressing images, and removing items from the file that are no longer needed.

Before you optimize a file, it’s a good idea to audit the file’s space usage. Click the Audit Space Usage button at the top of the dialog box. The space audit results may give you ideas about how you can most efficiently reduce file size.

To change the options in the PDF Optimizer dialog box, select the check box next to a panel (for example, Images, Fonts, Transparency), and then select options in that panel.

For information on the options in the PDF Optimizer dialog box, see “PDF Optimizer Options” in Adobe Acrobat XI Help.

## Making scanned text editable and searchable

If students scanned documents in the previous exercise, suggest that students apply OCR to those documents, too, and see how well it recognizes the characters. Students can also choose Searchable Image instead of ClearScan when applying OCR, and then compare the results.

## Converting email messages to PDF (Windows)

If students are using Microsoft Outlook or Lotus Notes, they can use Acrobat PDFMaker to convert email messages to PDF. Ask students to consider how they would convert email to PDF if they're using other email applications. They should be able to convert email to PDF using the Print command, just as they would create a PDF from a document in any other application.

## Converting web pages to Adobe PDF

Students may prefer to convert the web pages for their school or organization. It doesn't matter which web pages they convert; the process is the same.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How can you convert and combine multiple files into a single PDF file?
- 2 How can you create a PDF file using the Print command in Mac OS?
- 3 How can you reduce the file size of a PDF document?

## Answers

- 1 To convert and combine multiple files into a single PDF file, choose File > Create > Combine Files Into A Single PDE, and then select the files you want to combine.
- 2 To create a PDF file in Mac OS, choose File > Print, click the PDF button, and choose Save As Adobe PDF. Select a settings file, and then name and save the document.
- 3 To reduce the file size of a PDF document, choose File > Save As > Reduced Size PDF, and then select a version compatibility option. Or, if you're using Acrobat Pro, you can choose File > Save As > Optimized PDF, and then select optimization settings.

## Lesson 3: Reading and Working with PDF Files

This lesson gives students more experience with navigation, and then introduces a number of features that help make PDF documents more useful to readers. For example, students learn to search, make PDF documents accessible, print, and fill out a PDF form.

### Goals for this lesson

When they complete this lesson, students should be able to use several methods to navigate a PDF document efficiently, search PDF files for specific content, assess the accessibility of a PDF file, and make a PDF file more accessible. They should also be able to complete a form that is sent to them, and to print all or a portion of a PDF document.

### Changing the opening view

The first impression of a document can determine whether a reader feels comfortable with the content or overwhelmed, or even knows that navigational tools such as bookmarks are available. When deciding which settings to use for initial view, keep your audience in mind. For what purpose will a reader be opening the document? If it's to read a text straight through, your goal may be to make the view as inviting and uncluttered as possible. If someone opening the PDF document is likely to need to access a specific section somewhere in the body of the document, displaying bookmarks can help them find what they're looking for faster.

In addition to the initial views set in the exercise, invite students to select other settings to see how they affect the first impression of the document. Remind students that to see changes you make to the initial view, you need to save the document, close it, and then open it again.

### Searching PDF documents

The main difference between the Find command and the Advanced Search command is that the latter gives you options for how the search should be conducted. Additionally, the Advanced Search feature can search multiple documents at once.

Students may want to use both features to search for the same text in a document, and then compare the results depending on the search options they select in the Search pane.

## Printing PDF documents

Which options appear in the Print dialog box depend on what you have selected in the PDF document. If multiple thumbnails are selected in the document, the Selected Pages option is available. If no thumbnails are selected, the Current View option is available. If students don't see the Current View option in the dialog box, make sure they've deselected the thumbnails before closing the Page Thumbnails panel.

This lesson covers basic printing options in the Print dialog box. Lesson 13 covers more advanced options for professional printing.

## Filling out PDF forms

You can let students fill out the entire form, save it, or print it, so they can gain more experience working with forms as a form recipient. In Lesson 10, they'll learn how to create their own interactive forms in Acrobat. In Lesson 11, they'll learn how to use Adobe FormsCentral to create, distribute, and share forms.

## Making files flexible and accessible

Students who are using Acrobat Standard won't be able to use the Accessibility Checker or the Tags panel. However, point out that you can add tags and Alt text in Acrobat Standard using tools in the Accessibility panel.

For more information about tags, Alt text, and other accessibility topics, see Adobe Acrobat XI Help.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How can you change the initial view for a PDF document?
- 2 What does the Hand tool do?
- 3 How can you share a PDF document on Acrobat.com?

## Answers

- 1 To change the initial view for a document, choose File > Properties. In the Document Properties dialog box, click the Initial View tab. Then change the settings, click OK, and save the document.
- 2 The Hand tool lets you pan a document by dragging it across the application window.
- 3 To share a document using Acrobat.com, click Share to open the Share pane in Acrobat, and then select Use Adobe SendNow. Enter the email addresses of people you want to notify about the document, add a message, and then click Send Link.

## Lesson 4: Enhancing PDF Documents

Lesson 4 covers a range of Acrobat tasks that help you customize a PDF file and manipulate its pages. Students will learn how to accomplish many of the tasks that need to be performed to prepare a PDF file for distribution after it's initially created.

### Goals and objectives for this lesson

After completing this lesson, students should be comfortable evaluating a PDF file to determine what needs to be done to finalize it, as well as performing tasks such as deleting or inserting pages, editing links and bookmarks, renumbering pages, and inserting video files.

### Moving pages with page thumbnails

This is the third time students have worked with page thumbnails. First, they used them to navigate a document, and then they used them to select pages for printing. Now, they'll use them to change the order of pages in the PDF. This is a great opportunity to refresh their memories about those earlier tasks.

### Manipulating pages

The exercises show students how to rotate and delete pages. You may also want to show them how to extract pages, or you may want to wait and talk about extracting pages when students export pages in Lesson 5.

### Renumbering pages

Because renumbering pages in Acrobat doesn't change the page number printed on each page, this feature can be confusing to students. Point out to them that there are essentially two page numbers involved: the position of the page in the full PDF file and the "official" page number assigned to each page. Often, these are the same number. But in many cases, you'll want to assign different page numbers to the front matter of a book, or start page numbering after the cover page of a document. In those cases, renumbering pages will keep viewers on track.

### Editing links

Moving back and forth between the linked pages and the Table of Contents page can be very tedious. Encourage students to add the Previous View button to the Common Tools toolbar so they can quickly jump back to the contents page after testing each link.

When students create a link for page 10, point out the other options in the Create Link dialog box. In addition to linking to a page within the document, you can link to an external file or website.

## Working with bookmarks

When repositioning bookmarks, remind students that they nested a bookmark in an earlier lesson. Invite them to nest additional bookmarks now, so they can become comfortable positioning the bookmark appropriately to move it to different levels.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How can you rotate a page in a PDF file?
- 2 How do you create a link to another page?

## Answers

- 1 To rotate a page, select Rotate in the Pages panel or click the Rotate button in the Quick Tools panel. In the Rotate Pages dialog box, select a direction to rotate the page, select Pages, and then specify the pages to rotate.
- 2 To create a link to another page, select Link in the Pages panel. Drag a border for the linked area. In the Create Link dialog box, select Go To A Page View, and click Next. Then navigate to the page you want to link to, and click Set Link.

## Lesson 5: Editing Content in PDF Files

In Acrobat XI, you can edit text and images in PDF files more easily than before. As you modify text in a PDF, Acrobat reflows the text intelligently. This lesson gives students practice editing text and images, and reusing PDF content in other applications.

### Goals and objectives for this lesson

After completing this lesson, students should be able to add or modify text in PDF files, replace and crop graphics, copy content to the pasteboard, and export text, images, and tables to Microsoft Office application formats.

### Editing text

Exercises in this lesson give students the opportunity to remove entire blocks of text, make simple edits, and add a bullet point item. If they have time, encourage students to make additional changes to text on different pages to understand how text reflows, and let them experiment more with text formatting options.

### Redacting text

Most students won't need to redact text. However, if your students work in a legal setting or in administrative offices, they may need to know how to redact text in PDF documents. If they're using Acrobat Pro, show them the redaction tools in the Protection panel, and then demonstrate how to use them.

- Before redacting text, click Redaction Properties in the Protection panel to specify the redaction appearance and how the saved file should be named.
- Select Search & Remove Text in the Protection panel. Then enter the words, phrases, or number patterns (such as Social Security numbers) that you want to remove, and click Search And Redact.
- In the Search panel, click items to see them in context. Click Check All to select them all. Click Mark Checked Results for Redaction to select them for removal.
- When you've selected your redactions in the Search panel, click Apply Redactions in the Protection panel. Then save the document.

### Editing an image in another application

Ensure students understand the types of changes they can make to an image in Acrobat, and why they might need to edit an image in another application. You can make changes to the image's position or size in Acrobat: you can rotate it, flip it, crop it, replace it, or move it. If you want to add a filter, change the lighting, adjust color, add drawn elements, or perform other changes to the content of the image, you need to edit it in an application such as Adobe Photoshop.

The exercise invites students to make a change in Photoshop or another image-editing application. Remind them that the change should be something obvious, and that it doesn't need to look good or match the PDF file. For demonstration purposes, a large black box or a colorful squiggle can work well.

## Copying text and images from a PDF file

When you paste text into an authoring application, how the text is formatted depends on the application settings and whether a font has been substituted. In most cases, you'll need to make some adjustments after pasting the text. In this exercise, it's unlikely that students have the font that was used to create the bullets in the original PDF file, so those characters will probably be substituted with characters from a resident font.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How can you add a bullet point to text in a PDF file?
- 2 How would you crop an image in Acrobat?
- 3 How do you add an image to a PDF file?

## Answers

- 1 To add a bullet point to an existing list in a PDF file, right-click or Control-click the final bullet item, and choose Add List Item.
- 2 To crop an image in Acrobat, select the image, click the Crop tool in the Content Editing panel, and then drag the edges of the image inward.
- 3 To add an image to a PDF file, select the Add Image tool in the Content Editing panel, select the image you want to add, and then place it on the page.

## Lesson 6: Using Acrobat with Microsoft Office Files (Windows)

Acrobat PDFMaker makes it much easier to create PDF files from Microsoft Word, Excel, or PowerPoint documents. This lesson walks students through using PDFMaker in each of those applications.

### Goals and objectives for this lesson

After completing this lesson, students should understand the PDFMaker options available in Word, Excel, and PowerPoint.

### Getting started

Acrobat PDFMaker is not available for Microsoft Office for Mac OS. Students who use Mac OS, or who don't use Microsoft Office applications, may want to skip this lesson.

The primary instructions in the lesson assume the student is using Microsoft Office 2010 or 2007, but alternative instructions are provided for Office 2003 and earlier wherever possible.

### About Acrobat PDFMaker

PDFMaker includes several conversion settings, many of which are specific to an application. Encourage students to experiment with different settings to see how the resulting PDF files differ.

#### Settings included in most PDFMaker-enabled applications:

- **Attach Source File** attaches the document being converted to the PDF.
- **Create Bookmarks** converts certain elements in original Office documents to PDF bookmarks: Word headings, Excel worksheet names, or PowerPoint titles. Selecting this option overrides any settings on the Bookmarks tab of the Conversion Settings dialog box.
- **Add Links** includes active links and hypertext in the PDF.
- **Enable Accessibility And Reflow With Tagged Adobe PDF** embeds tags in the PDF.

#### Word-specific settings (Word tab)

- **Convert Displayed Comments To Notes In Adobe PDF** changes any Word comments to PDF comments. If the currently open Word document contains comments, more options appear in the Comments list on this tab:
- **Reviewer** lists the names of reviewers who have entered comments in the current Word document.

- **Include** includes the comments in the PDF.
- **Notes Open** specifies whether the PDF comment windows automatically open or are closed for that reviewer's comments.
- **Color** shows the color for that reviewer's comment icons. Clicking the color icon repeatedly cycles through a limited set of available colors.
- **# Of Comments** shows the number of comments that the reviewer made.
- **Convert Cross-References And Table Of Contents To Links** (Word 2002 and 2003 only) enables one-click navigation of these elements in the new PDF. This option is not available in Word 2007.
- **Convert Footnote And Endnote Links** integrates these into the PDF.
- **Enable Advanced Tagging** integrates tags into the PDF.

### Word-specific settings (Bookmarks tab)

The options you specify on this tab determine which items are converted into PDF bookmarks in the PDF.

***Important:** To include bookmarks in the conversion process, the **Add Bookmarks To Adobe PDF** option on the **Settings** tab must be selected. If you deselect that option, it overrides any options you select on this tab and no bookmarks are created.*

- **Convert Word Headings To Bookmarks** selects all the headings in the Elements list for conversion to PDF bookmarks.
- **Convert Word Styles To Bookmarks** selects all the text styles in the Elements list for conversion to PDF bookmarks. (This option is unselected by default.)
- **Convert Word Bookmarks** converts any user-created Word bookmarks to PDF bookmarks.
- **Element list** specifies which Word headings and styles are converted to PDF bookmarks.
- **Element** lists the names of all available Word headings and styles. The icons for **Headings** and **Styles** indicate the element types.
- **Type** also indicates whether the element is a heading or style in the Word document.
- **Bookmark** displays X's, indicating whether individual elements are converted to PDF bookmarks. Clicking an individual Bookmark option changes the selection status for that element.
- **Level** specifies where the element fits in the hierarchy structure of the PDF Bookmarks panel. Clicking an individual Level number opens a menu that you can use to change the value.

### Excel-specific settings

- **Convert Comments** converts user-created Excel comments to notes and lists them in the Acrobat Comments panel.
- **Fit Worksheet To A Single Page** adjusts the size of each worksheet so that all the entries on that worksheet appear on the same page of the PDF.
- **Fit To Paper Width** adjusts the width of each worksheet so that all the columns on that worksheet appear on one page in the PDF.
- **Prompt For Selecting Excel Sheets** opens a dialog box at the beginning of the file conversion process. In this dialog box, you can specify which worksheets are included in the PDF and the order in which the sheets appear in the PDF.

### PowerPoint-specific settings

- **Convert Multimedia** converts linked audio-video files to an FLV file and embeds it in the PDF.
- **Preserve Animation** (PowerPoint 2003 only) converts any animation effects in the PowerPoint file to equivalent animations in the PDF. This option is not available in PowerPoint 2007 or later.
- **Preserve Slide Transitions** converts PowerPoint slide transition effects to PDF transition effects.
- **Convert Hidden Slides To PDF Pages** converts any PowerPoint slides that are not seen in the usual playing of the presentation to PDF pages.
- **Convert Speaker Notes** converts any speaker notes for the PowerPoint presentation into Text notes in the PDF.
- **Use PowerPoint Printer Settings** (PowerPoint 2003 only) uses the same printer settings in the PDF as in the original file. This option is not available in PowerPoint 2007 or later.

## Converting Microsoft Word files to Adobe PDF

For tips on converting Word documents to PDFs, see Troubleshooting PDF-creation issues in Microsoft Word at [www.acrobatusers.com/tutorials/troubleshooting-pdf-creation-issues-microsoft-word](http://www.acrobatusers.com/tutorials/troubleshooting-pdf-creation-issues-microsoft-word).

## Converting Excel documents and starting a review

Make sure students understand that the process for starting an email-based review is the same using Acrobat PDFMaker in any of the Office applications.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How can you preserve the comments in a Word document when you save it as a PDF file?
- 2 How can you create a tagged PDF file from an Excel spreadsheet?

## Answers

- 1 To convert Word comments to PDF notes, click the Word tab in the Acrobat PDFMaker dialog box, and select Convert Displayed Comments To Notes In Adobe PDF.
- 2 To create a tagged PDF file from an Excel spreadsheet, on the Settings tab in the Acrobat PDFMaker dialog box, select the Enable Accessibility And Reflow With Tagged Adobe PDF options.

## Lesson 7: Combining Files

You can combine files of multiple formats into a single PDF file; each file is converted to PDF as you combine them, as long as you have the file's authoring application installed. If you use Acrobat Pro, you can opt to create a PDF Portfolio, instead, which can include unconverted files as well as PDF files.

### Goals and objectives for this lesson

Students should be able to combine files into a single PDF, selecting and arranging individual pages for the final PDF. They should understand that files are converted to PDF in the process, and be able to explain why some files cannot be included in a combined PDF file if the source application isn't installed. Additionally, students should be aware of PDF Portfolios and be able to describe how PDF Portfolios differ from documents combined using the Combine Files Into A Single PDF command.

### Browsing files

By default, Acrobat displays thumbnails in the Combine Files dialog box. In Mac OS, it must open the file's source application to display its thumbnail. For example, if you're including a Word document in the combined file, Acrobat opens Word so that it can display a thumbnail of the file. Having the applications open in the background can be disconcerting until students understand that Acrobat is using them.

### Creating a PDF Portfolio

The lesson's focus is on creating a single PDF from multiple documents. However, if students are using Acrobat Pro, encourage them to create a PDF Portfolio using the lesson files or their own files. The sidebar, "Creating a PDF Portfolio (Acrobat Pro)," provides general steps. Students can be creative when customizing the background, color palette, and other aspects of the file.

Though you must have Acrobat Pro to create PDF Portfolios, they can be opened in Reader or Acrobat Standard as well.

Ask students what they might use PDF Portfolios for. High school students might use a PDF Portfolio to present materials for a college application process. College students may assemble documents for a job interview. Adult learners may anticipate creating a PDF Portfolio to assemble the components of a presentation or project, or to present documents, images, and video related to a family vacation. PDF Portfolios can be used any time you want to pull together multiple documents with various formats to archive, present, or distribute.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How can you see a list of included files in the Combine Files dialog box?
- 2 Do you need Acrobat Pro to view a PDF Portfolio?

## Answers

- 1 To view the files as a list instead of thumbnails, click the Switch To List button at the top of the Combine Files dialog box.
- 2 No. You can view a PDF Portfolio using Adobe Reader, Acrobat Standard, or Acrobat Pro.

## Lesson 8: Adding Signatures and Security

Many students have concerns about distributing PDF files, especially after they see how much you can edit a PDF file in Acrobat. This lesson gives students the power to control who edits a PDF file—and even who has access to open it. Additionally, students learn about digital signatures, which are gaining wider acceptance in the business world.

### Goals for this lesson

At the end of this lesson, students should be able to describe the difference between security that prevents people from opening PDF documents without a password and security that limits the changes that can be made to a document. They should also be familiar with the concept of digital signatures, know how to create a self-signed digital ID in Acrobat, be comfortable using the Signatures panel, and understand the difference between using certificates to sign a document and using Adobe EchoSign.

### Viewing documents in Protected mode (Windows)

Protected mode, called *sandboxing* by IT professionals, prevents PDF files opened in Adobe Reader from creating mischief on your system. Protected mode is available only in Adobe Reader X and later for Windows, and it's on by default.

For most people, Reader works exactly as expected when documents are opened in Protected mode. However, it can interfere with some screen-reader applications and some third-party Reader plug-ins. Instructions for turning Protected mode off are in the student's book, but emphasize that they should turn it off only if they run into a specific problem. Otherwise, it's best to leave it on to protect their computers.

### Adding security to PDF files

Most students find the concept of setting a password to limit who opens a PDF document straightforward. However, the password that limits changes can be a little more confusing.

You might find it helpful to explain it to students this way: You're setting limits on the kinds of changes people can make in the PDF file. No one can remove those limits without the password.

We've provided a password that may be used each time a password is required. Of course, students should create their own passwords when working with their own files, and they can do so when working through this lesson, as long as they remember what those passwords are. Encourage students to try different combinations to see which passwords Acrobat identifies as strong and which as weak. It's useful to understand how to create strong passwords in many applications, not just in Acrobat.

## About EchoSign

EchoSign is a convenient, secure utility for signing documents electronically. However, this book does not include an exercise using EchoSign because the Acrobat license includes a limited number of free uses.

## About digital signatures

For the purposes of this lesson, students create a self-signed digital ID, but third-party digital IDs are often more secure. For information about working with third-party digital IDs, see “Creating or obtaining digital IDs” in Adobe Acrobat XI Help.

If students don’t use digital signatures right away, they may not remain comfortable with them, so it’s a good idea to point out the sections in Adobe Acrobat XI Help that can assist them when they need to work with signatures in the future.

## Questions

The following questions are not in the student’s Classroom in a Book.

- 1 What makes a password stronger?
- 2 What is a security envelope?

## Answers

- 1 Stronger passwords include both uppercase and lowercase letters, numbers, punctuation marks, and symbols. Longer passwords also tend to be harder to guess, and therefore stronger.
- 2 A security envelope is a PDF file that contains encrypted attachments, which may be PDF files or files in other formats.

## Lesson 9: Using Acrobat in a Review Cycle

Acrobat can help make review processes much simpler and faster than traditional review processes, requiring multiple cycles of marked-up printed documents. This lesson covers the basic concepts of review processes using Acrobat, and gives students experience using Acrobat in a shared review.

### Goals for this lesson

Students should know how to add comments to a PDF file, and should understand which commenting tools are useful for specific purposes. They should be able to explain the basic review process and know how to initiate a review.

### Adding comments to a PDF file

Acrobat provides a wide variety of commenting tools, including tools for text edits, drawing tools, and the familiar Sticky Note tool. You may find it useful to refer back to the descriptions of the tools as students begin adding comments. Though the exercises lead students through adding several specific comments, they don't have to limit themselves to those comments. If you have time, encourage students to try out each of the commenting tools in the PDF document, so that they can get a feel for when they'd use each one.

### Working with comments

One of the lesson files students import is an FDF file, which includes exported comments but does not contain the entire PDF file itself. As a supplemental exercise, you can instruct students to export the comments they created in their document to an FDF file that they can then import into the original PDF document.

To export comments to an FDF file:

- 1 Add the comments you want to include.
- 2 From the options menu in the Comments list, choose Export All To Data File.
- 3 Name the file, and choose Acrobat FDF Files (\*.fdf) for the file type.
- 4 Specify a location for the file, and then click Save.

### Initiating a shared review

A classroom setting is ideal for practice with a shared review. Before beginning this exercise, you may want to assign students to workgroups and ask members of each workgroup to exchange email addresses so they can participate in shared reviews together. Groups of three to four people should give students an opportunity to experience a real-world review cycle.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 What is an FDF file, and how do you create one?
- 2 Which commenting tools are automatically available in Adobe Reader?

## Answers

- 1 An FDF file is a file that contains additional data (such as comments or form data) for a PDF file, but not the original PDF file itself. To export comments to an FDF file, choose Export All To Data File from the options menu in the Comments list, choose Acrobat FDF files (\*.fdf) for the file type, and then click Save.
- 2 Adobe Reader XI includes all the commenting tools automatically.

## Lesson 10: Working with Forms in Acrobat

Interactive forms streamline the process of filling in and collecting data. Respondents can fill in forms using either Acrobat or the free Adobe Reader. In this lesson, students convert a static form to an interactive form, distribute it, and analyze the responses.

### Goals for this lesson

Students should be able to convert a document into an interactive form. They should feel comfortable distributing the form, and working with the form responses in the PDF Portfolio Acrobat creates for them.

### Adding form fields

You can invite students to create additional form fields to experiment with types of fields, including buttons, check boxes, list boxes, and other options. Emphasize the difference between radio buttons and regular buttons, which apply actions. Additionally, make sure students understand the difference between radio buttons, which allow you to select only one option, and check boxes, which let the respondent select multiple options.

### Distributing forms

In a classroom setting, you may want to divide the class into workgroups and ask students to exchange their email addresses with other members of their workgroup before beginning this exercise. Ideally, students will distribute forms to at least two other people and therefore have two sets of comments to import into the response file.

### Collecting form data

When you distribute a form, Acrobat automatically creates a PDF Portfolio for collecting the data submitted by users. By default, this file is saved in the same folder as the original form and is named filename\_responses. You can use this file to compile returned forms.

The PDF Portfolio Acrobat creates for the response file is a bit different from the PDF Portfolios students created in Lesson 7. Point out that each returned form appears as a separate component file in the PDF Portfolio.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How can you create a form field that accepts multiple lines of text?
- 2 What is Tracker?

## Answers

- 1 To create a multiline text field, choose Text Field from the Add New Field menu. Drag a text field, and then double-click it to view its properties. Click the Options tab, select Multi-line and Scroll Long Text, set a character limit if you want to, and then click Close.
- 2 Tracker is a utility in Acrobat that lets you track forms you've distributed. It displays the date you sent the form, the recipients, and whether they've responded. You can also use Tracker to send reminder email or send a form to additional people. Tracker also helps you manage shared reviews.

## Lesson 11: Using FormsCentral (Acrobat Pro)

Acrobat XI Pro installs Adobe FormsCentral, a form-creation application. FormsCentral makes it easier to create and distribute forms, and to collect, analyze, and share form data.

### Goals for this lesson

Upon completing this lesson, students should know how to use FormsCentral to create forms from scratch and from templates. They should understand the difference between local and online forms, and they should know how to save a form they create in FormsCentral as a PDF that they can open and edit in Acrobat.

### About FormsCentral

In most of the exercises in this lesson, students use the FormsCentral desktop application. You can use that application to create as many forms as you want, and you can save those forms as PDF files to edit in Acrobat or to distribute as you would other PDF forms. However, to use the distribution features of FormsCentral, you must upload the form to the online service. Your Acrobat Pro license entitles you to distribute, track, and share one form online at a time. If students wish to distribute multiple forms online at a time, they can purchase subscriptions to FormsCentral services from Adobe.

Because FormsCentral is a separate application, it's updated on a different schedule from Acrobat. Students may be prompted to update the application when they start it.

### Creating a form from a template

The exercises use a registration form template. However, FormsCentral includes a wide array of templates for different types of forms. Ask students what kinds of forms they create or use regularly, and they invite them to look for templates that might be adapted to their purposes.

As students edit the registration form, ask them to identify reasons they might choose to create a form in FormsCentral or Acrobat. For example, if you need to create a simple form quickly, FormsCentral can speed up the creation process dramatically. However, if you already have a form document, it makes more sense to use Acrobat to convert the document to an interactive form. Additionally, Acrobat provides more flexibility in laying out form fields. If a form's look and feel must match other documents, it might be wise to design it in an application such as Adobe InDesign, save it as a PDF, and then convert it to an interactive form.

## Saving the file

Saving a form from FormsCentral as a PDF file is straightforward. However, because the file is saved with Reader-extended features, you can't edit it in Acrobat. To edit the PDF file in Acrobat, choose File > Save A Copy, save it with a new file name, and then open the file.

Students probably won't know what Reader-extended features are, so you may want to explain: In earlier versions of Adobe Reader, users could not comment on PDF files or save completed PDF forms. However, when you saved a file from Acrobat, you could extend those abilities to Reader users for the specific file. In Adobe Reader XI, all users can comment on any PDF file and save completed PDF forms. Therefore, it's no longer necessary to extend features for Reader users, but because FormsCentral was released prior to Acrobat XI, it saves PDF files with Reader-extended features.

## Creating a form from scratch

Because students have already uploaded the registration form, they cannot upload another form without a subscription to the FormsCentral online service. Point out the difference between local forms and online forms when they create the new form.

Note that students can delete the previous form from the server, and then they can upload a new one. To delete a form from the server, open the My Forms tab, select the form that is currently online, and click the Delete button in the toolbar. Deleting a form from the server also deletes the form responses. Make sure you've saved those responses elsewhere or that you no longer need them before you delete the file.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 What's the difference between a local form and an online form?
- 2 How can you edit a PDF form in Acrobat after you save it in FormsCentral?

## Answers

- 1 A local form resides on your computer. You can create the form, save it as a PDF, and distribute it yourself. An online form has been uploaded to the FormsCentral online service; you can use FormsCentral to distribute and track it.
- 2 To edit a PDF from FormsCentral in Acrobat, you must first save it as a copy. Choose File > Save A Copy, save the file with a new name, and then open it.

## Lesson 12: Using Actions (Acrobat Pro)

Acrobat XI Pro includes *actions*, collections of steps that help you automate processes and make them more consistent. Some students may be familiar with actions in Photoshop, but actions in Acrobat are quite different. Instead of recording a series of steps, as you do in Photoshop, you build a custom wizard that performs some steps automatically and prompts the user to perform others.

### Goals of this lesson

Upon completing this lesson, students should understand what an action is and how to use one. They should also be able to create a custom action, including instruction steps, and know how to share an action with colleagues.

### Using predefined actions

Acrobat XI Pro comes with several actions already in the Action Wizard panel. The exercise instructs students to run the Prepare for Distribution action. After they run the action, you may want to invite students to select other actions and read their opening screens to see which steps are included in each action. Doing so will give students an idea of other actions that are already in place for them to use, and it will also help them conceptualize how actions are built, which will be useful when they create an action in the next exercise.

### Creating an action

As students create the action described in the exercise, ask them to notice which tasks are available to be included in actions. Any tasks that aren't included in the list on the left in the Create New Action dialog box can only be added using instruction steps.

After students create the action, ask them to consider what processes or procedures they perform in Acrobat that could be helped with an action. Any process that needs to be done the same way each time—especially if multiple people perform the same process—is a good candidate for an action, as is any multi-step process that could be done automatically by Acrobat. Students might mention preparing monthly newsletters for distribution, for example, or assembling annual reports. They might talk about specific review or approval processes that require particular steps be completed. The goal is to help students prepare to use this feature in their own work.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How do you run an action?
- 2 How can you import an action someone else has shared with you?

## Answers

- 1 To run an action, select it in the Action Wizard panel, review the steps, and click Start.
- 2 To import an action, open the Action Wizard panel in the Tools pane, click Manage Actions, and click Import. Then navigate to and select the .sequ file.

## Lesson 13: Using Acrobat in Professional Printing

Many of the lessons in this book cover aspects of working with PDF files electronically: distributing forms, sending files for review, and so on. This lesson specifically covers printing PDF files professionally. While print production professionals may find this a useful introduction to the features in Acrobat, the lesson is intended as a primer for students preparing to hand off PDF files to a print production service provider.

### Goals of this lesson

Students should learn how to prepare an Adobe PDF file for professional printing. They'll gain familiarity with printing concepts, such as color management, transparency flattening, and preflighting, and be better able to follow instructions provided by print professionals.

### Guidelines for creating print-ready PDF files

This sidebar is probably the most important part of this lesson. Encourage students to read it carefully, and discuss each of the bullet points. Some of the terms will make more sense to them after they've completed the lesson. Refer back to this sidebar as you discuss transparency, color management, and PDF presets later in the lesson.

### Creating PDF files for print and prepress

Communication is key when preparing files for print. Encourage students to request guidelines or any specific requirements from their printer before they design the document they plan to print. Early communication prevents the need to rework the document later. When it comes time to create the PDF file, students should follow the print professional's instructions for choosing a preset, which may be the Press Quality settings file, a standard such as a PDF/X preset, or a custom preset that the print professional provides.

### Preflighting files (Acrobat Pro)

To verify that your Adobe PDF file contains only the features, fonts, and formatting that you intend, use the Preflight tool to inspect and, in certain cases, correct the document's contents. Catching errors before you hand off the PDF file can save you time and money.

## Setting up color management

A color management system reconciles color differences among devices so that you can confidently predict the colors your system ultimately produces. Viewing color accurately allows you to make sound color decisions throughout your workflow, from digital capture through final output.

Color management for a file shouldn't begin in Acrobat, which is the end of the desktop workflow. Rather, color management should be in place when the file is created, especially if you're working with photographic images. Suggest that students look into color management features in the applications they use to produce their documents. If they use Adobe Creative Suite applications, they can synchronize color management settings using Adobe Bridge. For more information, see Bridge Help.

## Questions

The following questions are not in the student's Classroom in a Book.

- 1 How can you preview transparency flattening?
- 2 What is a *soft proof*?

## Answers

- 1 To preview transparency flattening for a document, select Flattener Preview in the Print Production panel.
- 2 A *soft proof* is a proof that takes place on the computer, so you don't need to print the document. When you perform a soft proof, you change settings so that your monitor matches the settings you expect to occur on your output device.