

Getting Started with **Adobe® Acrobat® 8**

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Getting Started with Adobe® Acrobat® 8

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Getting Started with Adobe Acrobat 8

Adobe Acrobat 8 Professional is a rare piece of genuinely multipurpose software that is many things to many people, making it difficult to define its use in a couple of words. Adobe describes Acrobat as a program designed to “Provide the essential applications and services that help knowledge workers communicate and collaborate with confidence.”

That’s a loaded statement if I have ever read one! This chapter is from the book *Adobe Acrobat 8 in the Office*, which contains several projects that show how the different workflows, processes, and features of Acrobat 8 Professional achieve different aspects of the program’s functional statement. My goal isn’t to serve as a spokesperson for Adobe but as a guide to help you understand how different aspects of Acrobat 8 output and functionality come together.

You can use Acrobat 8 Professional for combining different types of files into a PDF file and unifying it with consistent headers and backgrounds (providing a service for workers.) You can also use Acrobat to distribute a measured drawing that users working with Adobe Reader 8 can mark up and measure (knowledge worker communication) or for designing an e-mail or Web folder based method of exchanging reviewing comments (knowledge worker collaboration.)

In this chapter, we’ll take a quick tour of the program and look at some of its features and tools. If you’re interested in customizing the interface to make your work in Acrobat more efficient, tips that help you do so appear throughout the book.

Introducing Acrobat 8 Professional

Adobe Acrobat 7 introduced some terrific new features for organizing and managing PDF files. For the first time, users had the ability to enable a PDF file to use commenting and markup tools in Adobe Reader, effectively opening up one of Acrobat's strongest features to millions more users. The trend toward greater functionality continues with Acrobat 8.

Here are some of the new feature highlights of Acrobat 8 Professional:

- The Getting Started window opens over the program window, displaying an overview of program functionality and links to program features and Help files.
- Use a wizard to set up a shared review without requiring server administrator support. The review's comments are stored on a server folder and participants receive comments automatically.
- Collaborate in real time using Adobe Acrobat Connect for personal Web conferencing.
- Features enabled for Adobe Reader 8 users to collaborate on documents includes reviewing with complete commenting and markup tools, filling and saving PDF forms locally, and digitally signing PDF documents.
- Create a PDF/A compliant document, add metadata, and optimize the file directly from a scanner; create PDF/A and other standards-compliant documents using the PDFMaker.
- Organize the program interface by configuring and using custom toolbars; move and position secondary windows and panes.
- Create, locate, and control security policies through the Managing Security Policies window with the assistance of wizards.
- Permanently delete sensitive text or image content with redaction tools.
- Use a forms wizard to recognize and automatically add fields to a document.
- Compile a number of PDF files into a single package including a navigation interface without combining them into a single file.
- Open a blank PDF document or add a blank page to a PDF document!

Acrobat Versions

Acrobat comes in several versions, each useful for working with documents in different ways or in different situations. This chapter concentrates on Acrobat 8 Professional. Because there are differences among the features available in the various versions of the program, some of the most important features and which versions of the program they

apply to are listed in **Table 1.1**. The table includes Acrobat Elements, which is a specialized version of the program for enterprise environments; Adobe Reader 8; and Acrobat 8 Standard and Professional versions.

NOTE Acrobat 7 3D is another product in the Acrobat family, although a version 8 is not available. The 3D product contains all the features of Acrobat 7 Professional as well as a number of other tools designed for converting, inserting, configuring, using, and distributing embedded 3D content.

Table 1.1 Acrobat Versions and Their Features

	ADOBE READER 8	ACROBAT ELEMENTS	ACROBAT 8 STANDARD	ACROBAT 8 PROFESSIONAL
View, search, and print PDF files	X	X	X	X
Collaborate online in real time and share documents using Start Meeting	X	X	X	X
Automatically hide program tools and menus to view the document only in the Reading view	X	X	X	X
Combine PDF files as either a single file or as a package containing a number of files			X	X
Search within a PDF document or folder, look for specific components on a page, search subdocuments in PDF Package, search attached PDF files	X	X	X	X
Add, remove, save, customize headers, footers, watermarks, and backgrounds			X	X
Inspect PDF files for attributes ranging from metadata to hidden content and remove any or all attributes			X	X
Others aside from review initiator can serve as proxy for users outside a firewall in a shared review			X	X
Form creation wizard uses a template or existing documents in a number of formats, use auto field recognition process, add custom content				X (Windows)

Table 1.1 *continued*

	ADOBE READER 8	ACROBAT ELEMENTS	ACROBAT 8 STANDARD	ACROBAT 8 PROFESSIONAL
Enable Adobe Reader 8 users to work with Commenting tools				X
Create PDF documents from all applications that print		X	X	X
Combine source documents into a PDF document			X	X
Use content from Microsoft Office programs, including Word, Excel, PowerPoint, Outlook, Internet Explorer, Access, and Publisher (Windows)			X	X
Manage document reviews			X	X
Use security such as passwords and certificates		X	X	X
Use content from AutoCAD, Microsoft Visio, and Microsoft Project, including layers and object data (Windows)				X
Preflight high-end print jobs				X

Starting at the Beginning

When was the last time you opened a new piece of software that you'd never used before, or opened a new version of a program you've used for some time after it had been through a major redevelopment? Although you are sure to recognize some of the features and labels immediately, the experience can be more than a little intimidating.

I Need to Do...

To help you figure out what Acrobat 8 Professional does and how to get your job done, the program launches with the Getting Started with Adobe Acrobat 8 Professional dialog (**Figure 1.1**). This clear, simple-to-use interface is your introductory guide to the program.

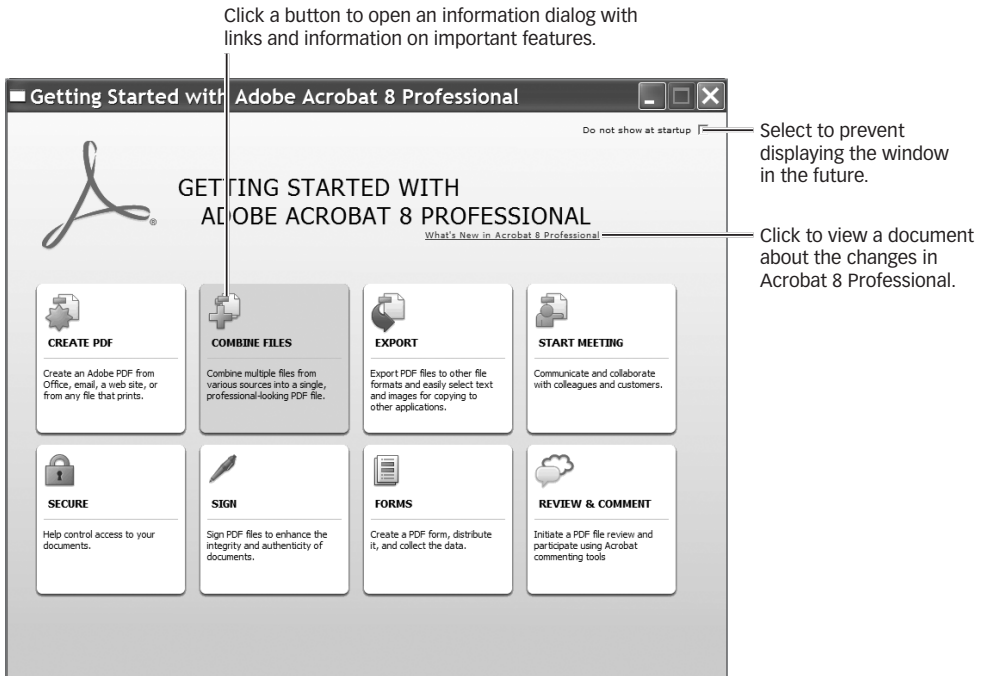


Figure 1.1 Acrobat 8 Professional shows you workflow options when you first open the program.

The primary workflows to follow in Acrobat 8 Professional are represented by a series of eight buttons in the Getting Started with Adobe Acrobat 8 Professional dialog. Each button defines a type of Acrobat function and representative icon as well as a caption explaining what the category does. The options are

- **Create PDF.** Create an Adobe PDF from Office, e-mail, a Web site, or from any file that prints.
- **Combine Files.** Combine multiple files from various sources into a single, professional-looking PDF file.
- **Export.** Export PDF files to other file formats and easily select text and images for copying to other applications.
- **Start Meeting.** Communicate and collaborate with colleagues and customers.
- **Secure.** Help control access to your documents.
- **Sign.** Sign PDF files to enhance the integrity and authenticity of documents.

- **Forms.** Create a PDF form, distribute it, and collect the data.
- **Review & Comment.** Initiate a PDF file review and participate using Acrobat commenting tools.



Be sure to check out what's new and improved by clicking the What's New in Acrobat 8 link. A page in the program's Help files opens, describing new or expanded features.

When you reach the point where you know what you plan to do in the program and where to find the appropriate tools, select the "Do not show at startup" check box at the upper right of the Getting Started with Adobe Acrobat 8 Professional dialog to suppress the window in the future.

NOTE You can view the window again by choosing Help > Getting Started with Adobe Acrobat 8 Professional.

Finding Your Way

Whether you're new to the program or just getting up to speed with the new version, I encourage you to check out where each button on the Getting Started with Adobe Acrobat 8 Professional dialog leads. The information is well designed and gives you insight into both how the program can meet your work requirements and new types of activities you may not have imagined you could do in Acrobat. For example, clicking the Create PDF button opens the dialog shown in **Figure 1.2**. On the dialog you find:

- Highlights of features and activities for that section of the Acrobat program's functionality.
- Categorized groups of activities, like those shown in the figure that include creating PDF files in Acrobat, creating PDF files from other applications, and using the Adobe PDF Printer.
- Task links  to click, such as Create PDF from a File, to open its corresponding program dialog.
- Info links  to click, such as Learn How to Create PDFs from Other Applications, to open the information page in the Acrobat Help files.

Once you have read through the information or found the task you need, click Home in the upper-left corner to return to the Getting Started with Adobe Acrobat 8 Professional dialog. If you like, select the "Do not show at startup" check box at the upper right to suppress the Getting Started dialog in future work sessions.

Click to return to the main Getting Started with Adobe Acrobat 8 Professional dialog.

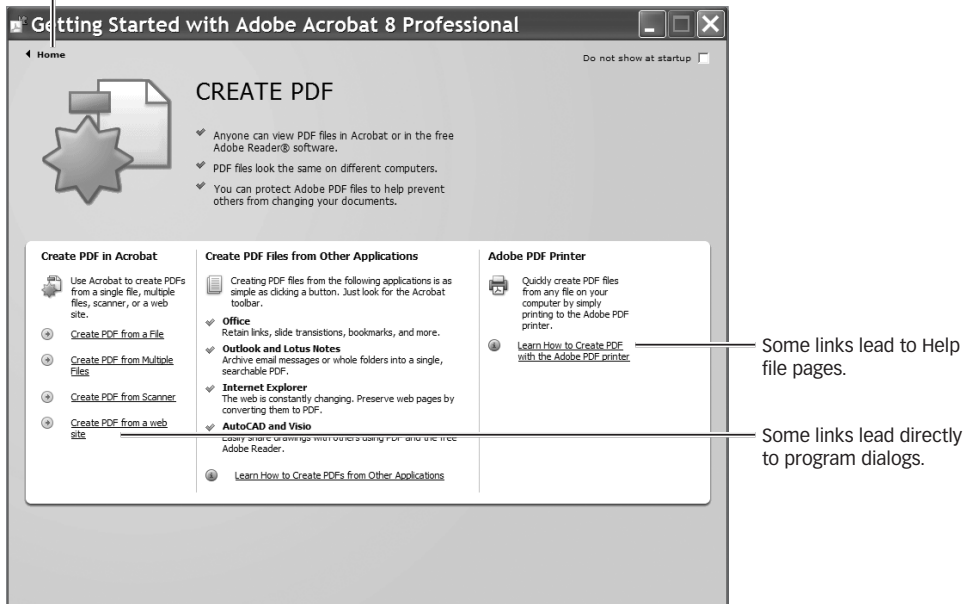


Figure 1.2 Each task area's dialog lists information and program features.

The Interface

Like most programs, Acrobat Professional has an interface composed of menus, toolbars, and a variety of work areas or panels (**Figure 1.3**). You can access many features and functions through the interface in a number of different ways or by using the shortcut keystroke combinations. Whichever method you choose really depends on what you feel comfortable with and how you like to work.

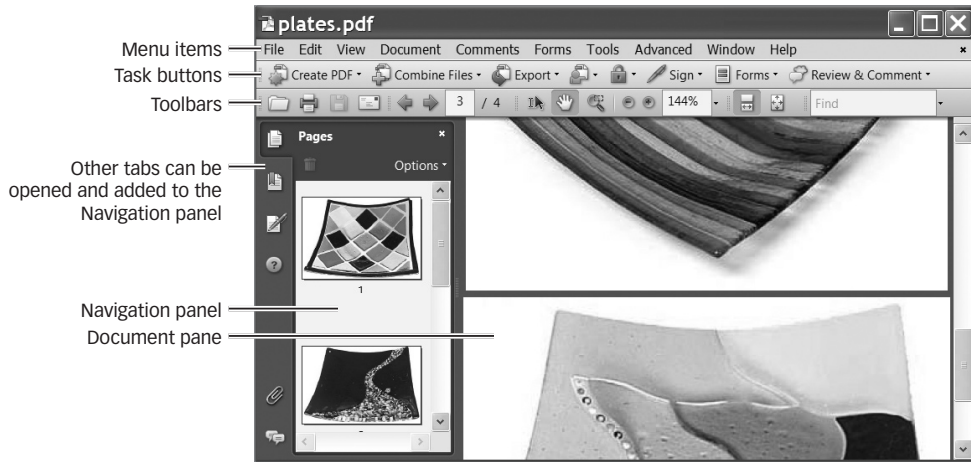


Figure 1.3 Acrobat 8 Professional’s interface is made up of several components arranged in the program window.

It’s important to take some time to learn about the features and understand how the program works for two main reasons:

- Knowing the features available lets you incorporate more of them into your workflow.
- You will work faster and smarter when you learn to use the program and customize it to meet your needs.

The Program Window

When you open Acrobat 8, take a few minutes to tour the program. Open the Navigation panels, click the Task buttons, and check out the toolbars’ contents. You’re bound to find something that is sure to boost your productivity! When you come across a feature of interest, be sure to experiment with it.

Acrobat’s program window consists of several sections. You see menus and toolbars across the top, which contain tool icons and pull-down lists and menus. The remainder of the program window shows your document and a series of Navigation panels. The main menu displays across the top of the program and contains many common menu item headings such as File and Edit, along with Acrobat-specific headings, like Document and Comments (**Figure 1.4**). Many of the menu items are also available on Acrobat’s toolbars. The name of the open, active document is shown at the top of the program window.

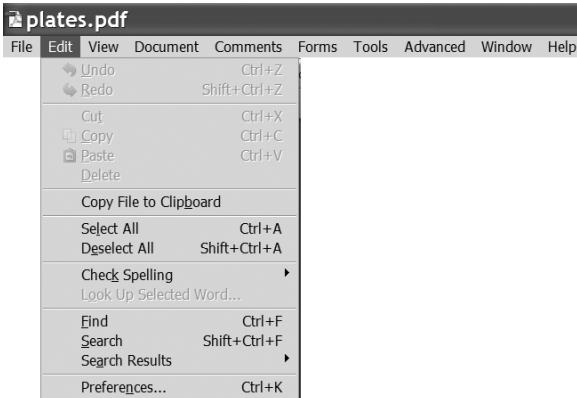


Figure 1.4 Select program functions from the Main menu.

Toolbars and Task Buttons

Acrobat contains a collection of toolbars available by choosing View > Toolbars. Most of the tools are also available by choosing Tools on the main menu (**Figure 1.5**).

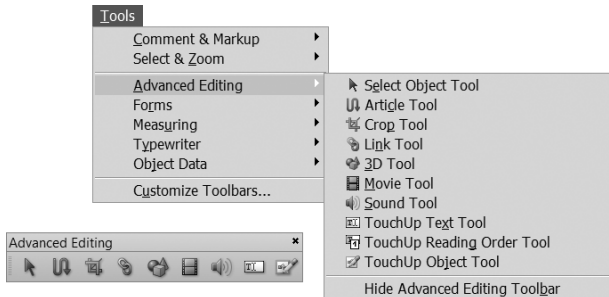


Figure 1.5 Tools are listed on the main menu as well as shown on toolbars.

You can spend a lot of time opening and closing toolbars using the menu. Save a couple of mouse clicks by working in the toolbar well, the area at the top of the program window that displays the toolbars. Right-click (Windows)/Control-click (Macintosh) in a blank space in the toolbar area to display the same options as those available by choosing View > Toolbars (**Figure 1.6**).

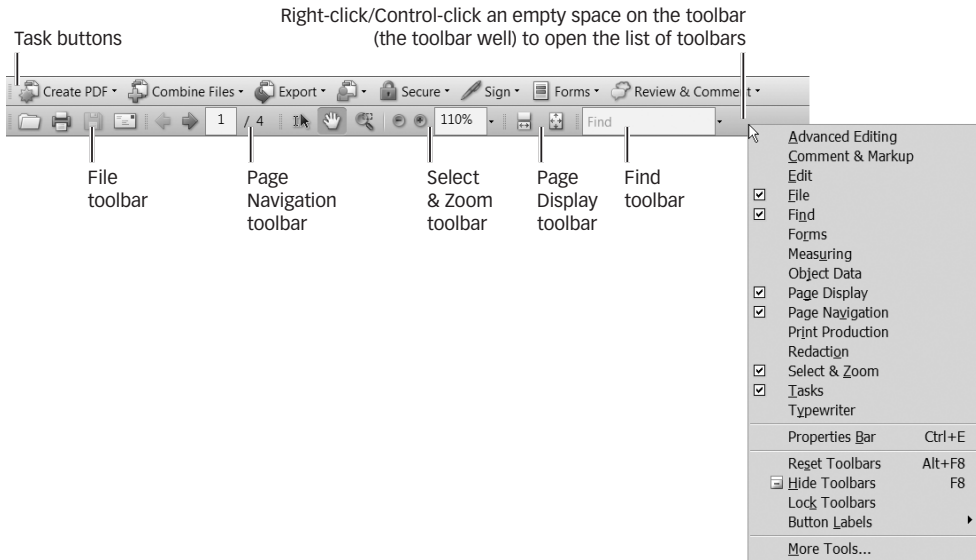


Figure 1.6 All the toolbars and display options are available from the toolbar well.

To identify a tool or toolbar name quickly, move your pointer over the vertical hatched lines at the left of a toolbar to display its name in a tooltip or pause your pointer over a tool to show its name there (**Figure 1.7**).

While you are learning to work with Acrobat, you can show the labels next to the tool icons, but you may want to hide them when you become more proficient in order to maximize working space. To do this, choose View > Toolbars > Button Labels, and then select the Default, All, or No button label options.

NOTE If you add multiple toolbars to the toolbar area or resize the program window to a smaller size, the labels are collapsed regardless of whether you choose the Default or All button label choices.



Figure 1.7 If you are unsure about a tool's or toolbar's name, you can display it in a tooltip by rolling the pointer over the icon.

Sorting your tools

Acrobat 8 introduces a terrific way to keep you organized in the program. For the first time you can add and remove tools from the different toolbars, allowing you to customize the interface according to the project you are working with and your usual work habits.

NOTE You can't change the order of the tools on the toolbar, nor can you combine tools from several toolbars.

For example, the File toolbar contains four tools as the default view, but maybe you never use the Open and Save icons (**Figure 1.8**). However, you regularly use the Organizer and Attach File from Web page commands, which are not displayed on the toolbar.

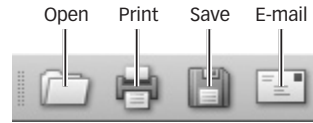


Figure 1.8 The default tools shown on a toolbar may or may not meet your needs.

TOOLS FOR YOUR TYPE

You can organize Acrobat's toolbars the same way in which you organize your physical desk. Which group do you belong to?

- **Neatniks.** Lock the toolbars if you are the type of person who needs everything placed just so in order to function. You can customize the tool layout, and once the program is arranged to your satisfaction, choose View > Toolbars > Lock Toolbars (or select the command from the toolbar well's shortcut menu). The separator bars between the individual toolbars disappear. You can't lock floating toolbars—those you have pulled off the toolbar area—nor can you add them to a locked toolbar.
- **Some tidiness necessary.** Some people like things surrounding them during the workday and then like everything back in its place before they go home. Choose View > Toolbars > Default to reset the toolbar arrangement to the program default.
- **The rest of us.** I'm sure I'm not alone as a person who usually leaves things as they are when I quit work for the day. Often, seeing what I was working with the day before triggers my to-do list. The same can be said of toolbars. When you close and reopen Acrobat, the arrangement of toolbars and Task buttons remains as you last set them.

Follow these steps to customize the toolbar:

1. Choose View > Toolbars > More Tools, select the command from the toolbar well's shortcut menu, or choose Tools > Customize Toolbars to open the More Tools dialog.
2. Locate the toolbar list you'd like to customize.
3. Select tools to include and clear tools to exclude from the toolbar (**Figure 1.9**).

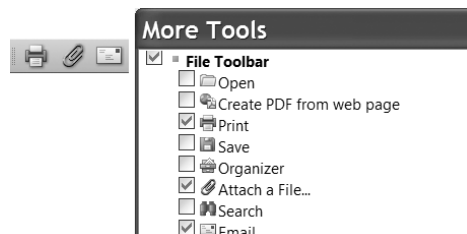


Figure 1.9 Add or remove tools from the toolbar

- Click OK to close the dialog and make the changes in the toolbar. The newly configured toolbar is also shown in Figure 1.9.

Task buttons

Each Task button contains a set of commands for performing a particular function, such as creating a PDF file or commenting on a document (**Figure 1.10**). They are different from toolbars in that they contain related commands instead of related tools. Open a Task button by choosing View > Toolbars > Tasks and selecting the appropriate Task button. Display the Task button's bar by choosing View > Toolbars > Tasks.

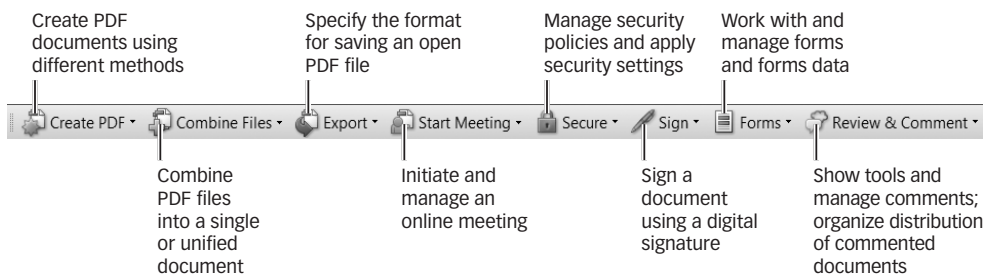


Figure 1.10 Each Task button contains a group of related commands for performing a specific type of task.

Acrobat 8 contains a set of eight Task buttons:

- **Create PDF.** Use the commands for generating PDF documents using different methods, such as documents or scans.
- **Combine.** Choose commands for combining two or more PDF files, or building a PDF Package.
- **Export.** Select commands for exporting the active PDF document in one of many file formats.
- **Start Meeting.** Get an online collaboration in real time underway using these commands.
- **Secure.** Choose commands for using and managing security policies.
- **Sign.** Use the commands to add secure signatures to a document.
- **Forms.** Use the commands for creating and editing forms as well as other forms-related tasks.

- **Review & Comment.** Choose commands for things like showing the different Commenting toolbars and managing comments. Look for commands for managing a review cycle, such as starting a new review or opening the Tracker, a window used for managing reviews.

Click the Task button's down arrow to display its menu (Figure 1.11). Each Task button also includes a command to open its corresponding How To panel, which contains information on using the commands.

NOTE Read about the How To panel in the section "Help is Close at Hand" later in the chapter.



Figure 1.11 The Secure Task button offers a number of ways to apply and manage document security in Acrobat.

Navigation Panels

As soon as you open a file in Acrobat a column of icons displays at the left side of the program window. Click one of the default set of six icons to open a tabbed panel called a Navigation panel (Figure 1.12).

Use the different tab views to manage and control your document's content. The set of default icons, shown in Figure 1.12 from top to bottom, include:

- **Pages.** Go to specific pages by selecting page thumbnail images.
- **Bookmarks.** Go to different areas of the document or perform specific actions using bookmark links.
- **Signatures.** Read and verify signatures added to the document.
- **How To.** Find and follow step-by-step instructions for performing different program tasks.
- **Attachments.** View a list of files attached to the active PDF document.
- **Comments.** View, reply, sort, and manage a list of comments applied to the active PDF document.

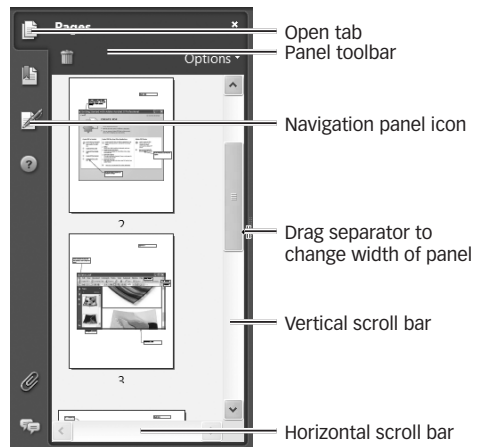


Figure 1.12 The Navigation panel is docked to the left side of the program window.

All panels open vertically at the left of the program window, except the bottom two Navigation tabs showing the Attachments and Commenting panels that open horizontally at the bottom of the program window.

There are many more Navigation tabs than those included in the default configuration. Follow these steps to add another tab to the panels:

1. Choose View > Navigation Panels and select other items from the menu (Figure 1.13).

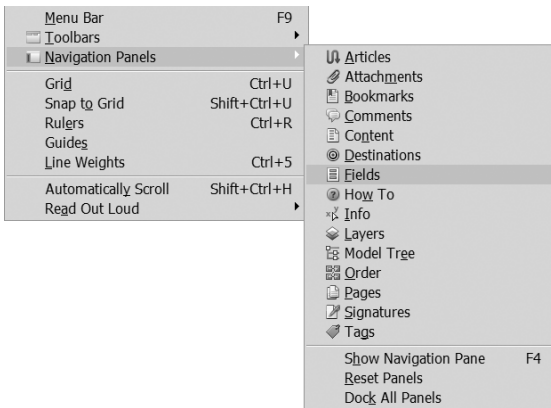


Figure 1.13 Acrobat 8 Professional contains an extensive list of Navigation panel options.

TIP Save a couple of mouse clicks: Right-click/Control-click in the area of the icons displayed on the Navigation panel to open the menu shown in Figure 1.13.

2. The newly selected Navigation items aren't automatically added to the column of icons in the Navigation panel. Instead, they are arranged in a preconfigured collection of tabbed dialogs. Select the tab you want to add to the panels (Figure 1.14).
3. Drag the tab for the panel you want to add from the dialog to the Navigation panel's area and release. The additional icon is now docked with other icons, and its tab is open (Figure 1.15).

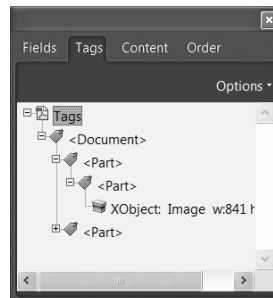


Figure 1.14 Selecting a new Navigation panel opens a tabbed dialog.

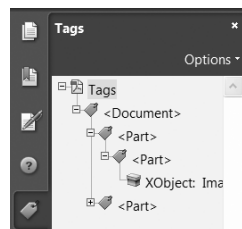


Figure 1.15 Drag the tab from the dialog to dock it with the other Navigation panel icons.

Moving Through a Document

Earlier versions of Acrobat included a status bar running along the bottom of the program window to show layout and navigation tools. Acrobat 8 uses the Page Navigation and Page Display toolbars docked at the top of the program window to manage layout and navigation.

The default toolbar options are limited to the most commonly used tools (**Figure 1.16**). Access additional tools from the More Tools dialog by choosing View > Toolbars > More Tools.

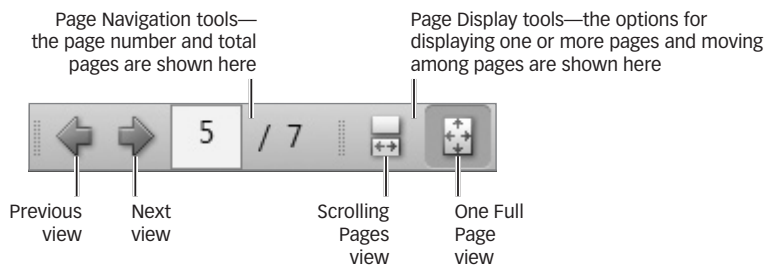


Figure 1.16 Move through a document using the Page Navigation or the Page Display tools; change the viewing layout depending on the structure of your document.

The Page Navigation tools show the number of the visible page and the total page count as well as Previous and Next buttons to view the previous and next pages. The Page Display toolbar lets you choose between a continuous page view that you scroll and a single page view that shows one page at a time and isn't affected by scrolling. In Figure 1.16, the layout view is One Full Page (the One Full Page icon is highlighted).

Opening and Saving Documents

One of the coolest things happened in Acrobat 8: Until this version, you couldn't add blank pages to an open document or open a new blank PDF file. We used all sorts of interesting workarounds like deleting content from an existing page or saving dummy PDF files having just a blank page to use as needed.

You still won't find a "New" command in the File menu, but choose File > Create PDF > From Blank Page to access the snazzy new feature (**Figure 1.17**). The other creation options include creating a PDF from a file, from multiple files, from a scanner, or from a Web page. You can also create a PDF from a clipboard image, which is a selected area of the document pane that is copied to the system clipboard.



Figure 1.17 Generate a PDF file in one of several ways.

The only type of document that opens instantly in Acrobat is a PDF, but Acrobat can *convert* many types of documents automatically when you open them by choosing File > Open. For example, if you open a Microsoft Word document in Acrobat 8, it goes through an automatic conversion process before the file is displayed as a PDF. You can also use the Create PDF Task button's commands for creating a PDF in a variety of ways.

NOTE For the most part, the conversion process requires that your system have the program that generated the source files installed. Acrobat 8 Professional converts the native AutoCAD .dwg format to PDF without having the program installed. InDesign files (.indd) can also be converted this way.

You can save a PDF document in the usual way—that is, by using the Save command on the File menu or toolbar. Click the Export Task button to open its menu and choose a format from the menu or click More Formats to open a submenu (**Figure 1.18**). Once you make a selection, the Save As dialog opens. Name and save the file; you can click the Settings button to configure most types of files.

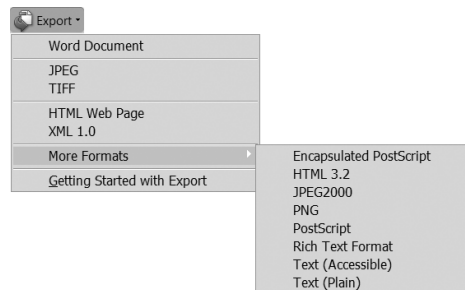




Figure 1.18 Save a PDF file in several file formats.

Help Is Close at Hand

Check out the offerings in the How To panel when you are first learning about Acrobat or learning how to use a new feature. The How To panel picks up where the Getting Started with Adobe Acrobat 8 Professional dialog leaves off.

Click the How To icon  on the Navigation panel to open the tab (**Figure 1.19**). The panel lists common tasks and contains information groupings on special topics such as print production or working with forms. Select a topic to display a list of common tasks or functions associated with that topic.

You can also revisit the How To contents by selecting Help > How To and choosing a topic title.

If you don't find what you are looking for in the How To panel, more help is just a click away! Use Acrobat's main Help feature to find in-depth information that goes beyond the step-by-step instructions on basic program functions. Click the Complete Acrobat 8.0 Help icon on the How To panel  or Choose Help > Complete Acrobat 8.0 Help, or press the F1 key. The Adobe Help Viewer opens in a separate window.

You can access information in three ways with Acrobat's Help feature—by Contents, Index, or Search. Use the option that suits how you work and your Acrobat knowledge level:

- **Contents.** If you are a very systematic person, you may find the default view in the Adobe Help Viewer the most useful. The Adobe Help Viewer opens to the Contents listing by default where topics are arranged in a hierarchy from broadest to most specific topics (**Figure 1.20**).

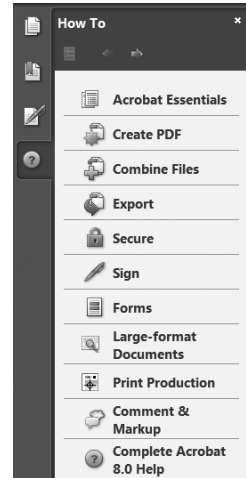


Figure 1.19 Click one of the main topic areas in the How To window to open a list of topics.

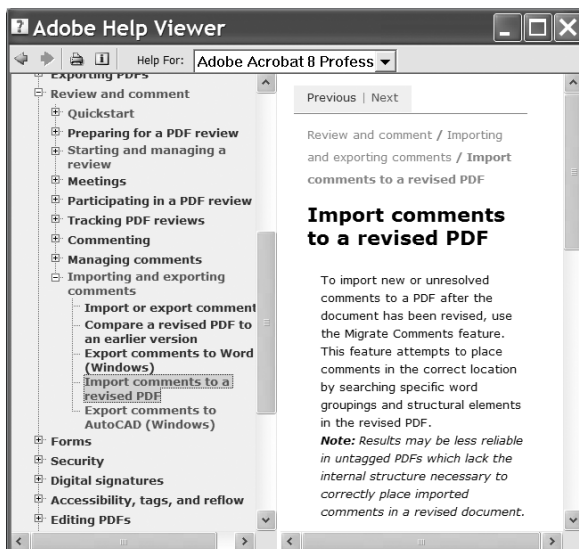


Figure 1.20 The Contents tab is an easy way to find information if you are familiar with Acrobat.

- **Index.** If you aren't sure what you are looking for, select a number or letter to show a list of terms on the Index tab. You may find a term that triggers a mental connection to the precise topic you need.

- **Search.** Use the Search tab if you are familiar with the program and want to find a specific topic. Type the search term in the “Find pages containing” field, and then click Search. Topics containing your search term are listed in the pane at the left of the Help window. Click a topic to display the content in the main pane; each instance of the search term is highlighted. If the highlighting is distracting, click the main pane of the Help window to deselect the highlights.

TIP Instead of closing the Help window, minimize it; when you reopen it, the last content displayed is visible. Since the Help files are in a separate window from the program, you can arrange both Acrobat and the Help files on your desktop for ease of use.

Making Your Exit

We have come to the end of the tour, as well as the end of this chapter. Close Acrobat as you would any program. When you reopen the program, the toolbars are arranged as you last left them. The Navigation panel, on the other hand, may or may not be displayed in the same way. Acrobat allows you to specify how you want its navigation features to display when a file is opened. For example, along with the document, you can show one of the Bookmarks, Pages, Layers, or the Attachments panel. Settings are not constant; that is, you decide how the navigation features are displayed on a file-by-file basis.