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Acrobat X

JOHN DEUBERT

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Peachpit Press

Visual QuickStart Guide
Adobe Acrobat X
John Deubert

Dedication

For (in order of height) Barbara, Elizabeth, Gigi, and Julia.

Acknowledgements

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Introduction

You have to give Adobe credit. There aren't many companies that have managed to change the world once, let alone twice. In 1985, Adobe introduced PostScript, which became the rock on which the entire electronic publishing industry was built; they forever changed the world of professional printing. In 1994, Adobe launched the first version of Acrobat, whose file format, PDF, is now the basis for modern electronic distribution of all manner of documents.

PDF files are used by everyone who creates or receives documents in the modern world. CEOs, secretaries, artists, railway-station managers, hemp-wearing individuals who create crystal-based healing jewelry; everybody with a computer sends and receives documents as PDF, and uses some flavor of Adobe software to read them.

Acrobat X is the newest incarnation of Adobe Systems' software for viewing, managing, and manipulating PDF files. This version of Acrobat reflects years and years (and years!) of Adobe's technological development and end-user experience.

The emphasis in this version of Acrobat is usability. Adobe has rethought much of Acrobat's interface to make it more streamlined and easily explored. Creating forms, sending files out for review, and combining PDF files into a single document is smoother and easier than ever.

In addition, it is easier to discover features of Acrobat X that you never knew existed. Did you know that you can measure distances and areas on scale drawings, or that you can conduct a live video conference to discuss a document? Adobe also provides a free online service, Acrobat.com, to let you share any kind of file—not just PDFs—with other people.

Acrobat X is designed to ensure that if you need a feature, you will find it. "Do what you need to, faster and easier" was clearly a primary design goal for this newest Acrobat. For my taste, this is the easiest-to-use Acrobat to come along for years.

How to use this book

This book describes the purpose and use of Acrobat X's most important features, new and old. Like all Visual QuickStart Guides, this book emphasizes the practical application of the program's features and provides step-by-step instructions on how to use those features. To help work through those steps, you can download a set of pre-built PDF files that you can use as examples as you explore the tools in Acrobat X. These files are available on the book's web page: www.peachpit.com/acrobatxvqs.

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Creating PDF Files

PDF is arguably the best file format for storing and distributing documents. It's compact, it supports a wide variety of content (including text, images, line art, and multimedia), and you can use it for free without incurring licensing fees. However, all this capability is useless unless you can conveniently create PDF files. This is the topic we address in this chapter.

When you install Acrobat, you also install features into your computer system that make it easy and quick to generate PDF files from within virtually any Macintosh or Windows application. Furthermore, Acrobat has many powerful features that let you create PDF files: you can convert many common file types to PDF, scan paper documents directly into PDF, convert Web pages to PDF files, and combine several PDF files into a single document.

In this chapter, you learn how to do all of these tasks.

Printing to a PDF File

Acrobat makes it easy to create PDF files from any application—spreadsheet, database, image editing, word processor—by simply printing to a PDF file. If you can print your document, you can convert it to PDF.

However, the details are a bit different between the Macintosh and Windows.

Printing to Adobe PDF in Windows

When you install the Windows version of Acrobat X, you also install onto your computer system a virtual printer called Adobe PDF. When you print to this "printer," it converts the document being printed into a PDF file rather than producing sheets of paper.

To print to a PDF file in Windows:

1. Choose File > Print in your application.

   The standard Windows Print dialog opens Ⓐ.

2. In the Printer pop-up menu, choose Adobe PDF.

3. Click Print.

   A standard Save File dialog opens.

4. Type a name for your PDF file.

5. Click OK.

   After a short while, you will see a newly created PDF file on your disk.

> **TIP** If you click the Properties button that's visible in Ⓐ, you will be presented with some settings that determine the characteristics of the new PDF file Ⓑ. The default settings, shown here, are reasonable.
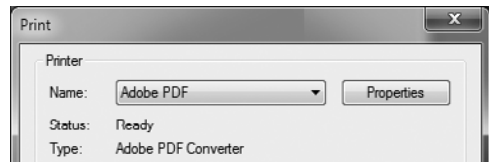
Ⓐ Acrobat installs onto your system a virtual printer named Adobe PDF. When printed to, this printer creates a PDF file.
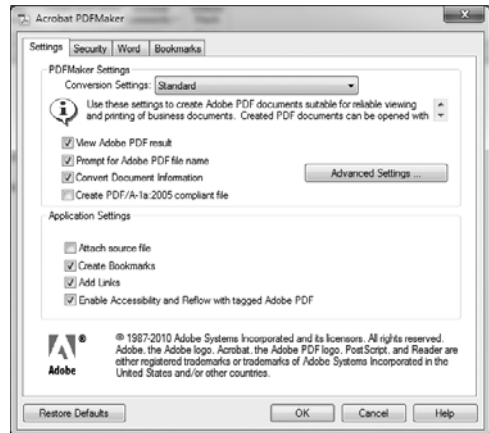
Ⓑ The Adobe PDF virtual printer has a collection of settings that affect how it works. The default values work well.
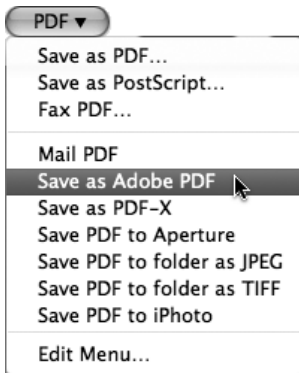
C Printing to a PDF file is built into Macintosh OS X. This PDF drop-down menu is at the bottom of the standard Mac Print dialog and is available in every application.

Printing to Adobe PDF on the Macintosh

You don't actually need Acrobat to either create or view PDF files on a Macintosh. Because the Mac's internal drawing language is based on PDF, the Mac can display and create PDF files on its own. However, Adobe has a lot more experience working with PDF (they invented it, after all), and Acrobat reflects this by creating PDF files that much more completely support all of PDF's capabilities: all the annotation types, the form fields, and so on.

In the past, Acrobat installed an Adobe PDF printer driver on the Mac, as it does in Windows. However, Acrobat X installs itself into the standard Mac printing mechanism, making for a more Mac-like experience.

Every Print dialog on the Macintosh has a PDF drop-down menu that offers a set of useful print-to-PDF functions **C**. Acrobat X adds to this menu a Print to Adobe PDF item; when you select this, the document is printed to a PDF file using Adobe PDF rather than Apple's built-in PDF generator.

To print to Adobe PDF on the Macintosh:

1. Choose File > Print in your application. The standard Mac Print dialog opens.

2. In the PDF drop-down menu, choose Save as Adobe PDF **C**.

   You are presented with the Save as Adobe PDF dialog **D**.

3. Choose the settings you wish in the dialog.

   The Settings pop-up menu lets you choose parameters appropriate to common document types **E**; Standard will work fine in most cases. The After PDF Creation menu gives you the option of opening the new PDF file in Acrobat **F**.

4. Click Continue.

   A standard Save dialog opens.

5. Type a name for your PDF file.

6. Click OK.

   After a short while, you will see a newly created PDF file on your disk.
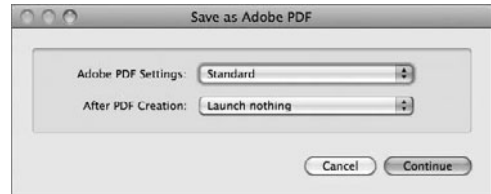
D When you print a document to Adobe PDF on a Mac, you are presented with the Save as Adobe PDF dialog.

E The Settings pop-up menu lets you specify the purpose of the PDF file you are creating.
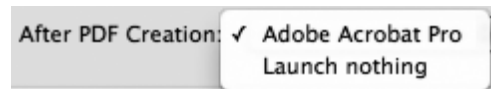
F You can also specify whether the newly created PDF file should be automatically opened in Acrobat.

# Using PDFMaker in Microsoft Office (Windows)

The Windows version of Acrobat X automatically installs a set of tools into the Microsoft Office suite of software **Ⓐ**. These tools are known collectively as PDFMaker.

The appearance and abilities of PDFMaker vary depending on your version of Office and which Office component you are working with. In Microsoft Word 2010, it installs tools that let you do the following:

- Create a PDF file of the current document.

- Email the current document as a PDF file to an address of your choice.

- Do a Word mail merge and save the result as a PDF file.

- Send the current document to a list of people so they can comment on it.

- Convert the document to PDF and open it in Acrobat for comment.

The Create PDF and Email PDF functions are available in all versions of Office, making it very simple to convert Word, Excel, and other Office documents to PDF.

The instructions on the next page are for Office 2010. Earlier versions of Office have the same functions, but they may reside in a PDFMaker toolbar rather than an Acrobat "ribbon."
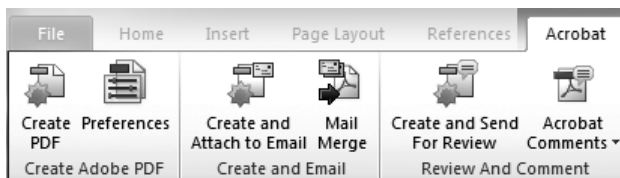
Ⓐ Acrobat X installs PDFMaker, a set of PDF-related controls, into the Microsoft Office applications.

To create a PDF file in an Office application:

1. With your Office document active, select the Acrobat ribbon (A).

2. Click the Create PDF button.

   Office presents you with the standard Save dialog.

3. Specify a name and location for your PDF file.

4. Click OK.

Acrobat creates the PDF file, displaying a progress bar while it works.

**TIP** **PDFMaker uses the Adobe PDF virtual printer behind the scenes, so don't be alarmed if your Office application seems to be printing in the background when you use this toolbar.**

TIP **If you Mac users are feeling left out because the Mac version of Microsoft Office doesn't have a PDFMaker, you don't need it. PDFMaker isn't relevant to the Mac, because nearly all of its functions are available in the standard Mac Print dialog. (Reread the earlier section "Printing to a PDF File.")**

To email an Office document as a PDF file:

1. With the Acrobat ribbon active (A), click the Create and Attach to Email button.

   The standard Save dialog opens.

2. Specify a name and location for your PDF file.

3. Click OK.

   Acrobat creates the PDF file, displaying a progress bar while it works.

   When it's finished, PDFMaker launches your email client software and opens a blank email window with the new PDF file already attached (B).

4. Fill out the destination address and subject in your email client.

5. Click your email client's Send button.

TIP **Depending on your email client, PDF-Maker may ask you for an email address and subject, and send the PDF file directly without launching your email client.**
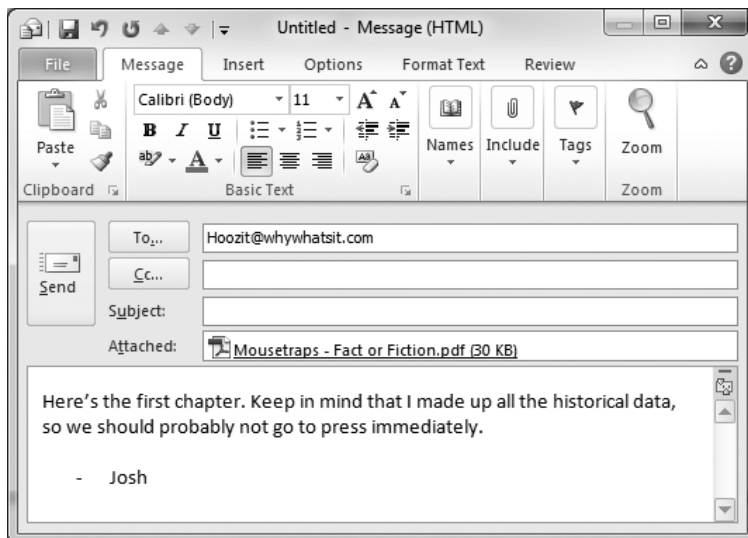
B The Create and Attach to Email tool launches your email client and opens a blank message that has the new PDF file attached to it.
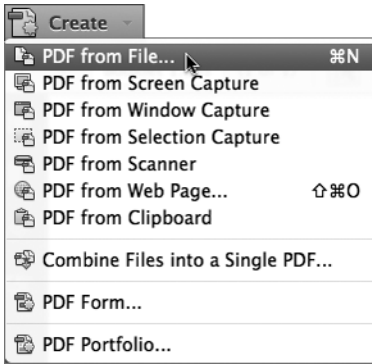
A The Create menu on the Quick Tools toolbar lets you create a PDF file from a variety of sources.
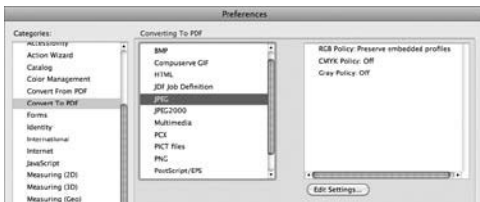
B Acrobat X's Preferences let you specify the details of how it converts the various file formats to PDF.

Conversion File Types

Acrobat X can convert the following types of files to PDF:

- 3D
- BMP
- GIF
- HTML
- InDesign
- JPEG
- JPEG2000
- Multimedia
- PCX
- PICT
- PNG
- PostScript/EPS
- Text
- TIFF

This list encompasses the most common graphic, design, and image formats.

Converting Images and Other Files to PDF

Acrobat X can convert a variety of file types to PDF and then open them in a document window. The list of supported file types includes all the common vector and image formats (see the sidebar "Conversion File Types").

Converting these files to PDF is remarkably easy; you just open the file in Acrobat.

To convert a file to PDF:

1. In the Quick Tools toolbar, click the Create button and choose PDF from File in the drop-down menu **A**.

Acrobat presents you with a standard pick-a-file dialog.

2. Choose the file that you want to convert to PDF.

This can be an image file, a Word document, or any other file type that Acrobat knows how to convert.

Acrobat converts the file to PDF and opens it in a new document window.

3. If you want to save the document on your disk, choose File > Save As.

TIP If you are avoiding toolbars for some reason, you can also access these conversions by choosing from the File > Create submenu.

TIP Acrobat's Preferences include a large collection of controls that determine how it converts files to PDF. The default values for these controls are sensible and should generally be left as is. However, as you gain experience you may find it interesting to look at them. On the Mac choose Acrobat > Preferences, or in Windows choose Edit > Preferences, to access the Convert to PDF options **B**.

Scanning Directly to PDF

Using Acrobat, you can scan paper documents directly to a PDF file. Acrobat can operate any scanner with a TWAIN driver or a Windows Image Acquisition (WIA) driver. Most scanners install on a computer with one or both of these drivers.

Remember that if you scan a text document, the result is a picture of the text, not the text itself; the resulting document isn't searchable. Acrobat can use Optical Character Recognition (OCR) technology to convert the scanned text to real text; you'll learn how to do this in Chapter 17.

To scan a page directly to PDF:

1. On the Quick Tools toolbar, click the Create button and choose PDF from Scanner from the drop-down menu **Ⓐ**. The Acrobat Scan dialog opens **Ⓑ**.

2. From the Scanner pop-up menu, choose the scanner you want to use. This menu lists all the TWAIN and WIA scanners visible to your computer.

3. Choose the settings for the scan:
   ▸ If your scanner can do double-sided scans, choose Front Sides or Both Sides from the Sides menu.
   ▸ If you want to convert scanned text to searchable text, select the Make Searchable check box.

   The remaining controls in this dialog are best left at their default settings. Check Acrobat Help for a description of them.

4. Click Scan.

   Acrobat scans your document and opens the resulting file in a new PDF document window.

5. Choose File > Save As to save your new PDF file to your disk.

TIP You can select the Append radio button in the Acrobat Scan dialog to add your scanned page to the end of an existing PDF file. I use this sometimes when scanning receipts that need to be added to a PDF-format invoice.

Ⓐ The Quick Tools toolbar lets you scan a paper document directly to PDF.

Ⓑ The Acrobat Scan dialog lets you control how your scanned document is converted to PDF.
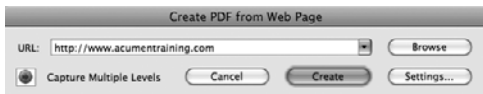
A The Create PDF from Web Page dialog lets you specify the URL of a Web page you want to convert to PDF.

B If you click the Capture Multiple Levels button, you get additional controls that limit the scope of the Web page conversion.

Converting Web Pages to PDF

Acrobat can convert a Web page or an entire Web site into a single PDF file. The result is a self-contained PDF version of the original Web page, with all images and graphics intact and with functioning links.

I use this feature to convert online manuals and other documentation into a PDF file that I can keep, read, and search offline.

To convert a single Web page to PDF:

1. On the Quick Tools toolbar, choose Create > PDF from Web Page.

Acrobat presents you with the Create PDF from Web Page dialog **A**.

2. In the URL field, type the complete Web address of the Web page you want to convert to PDF.

3. If you want to capture part of the entire Web *site* (that is, not just a single Web page), click the Capture Multiple Levels button, which reveals some additional controls **B**:

▸ In the Get Only field, type the depth to which you want to convert the site. (See the sidebar "Web Site Conversion Settings.")

▸ Select both "Stay on same path" and "Stay on same server."

continues on next page

4. Click Create.

Acrobat displays the Download Status dialog **C**, showing you how the conversion is progressing.

When the conversion is finished, Acrobat displays the converted Web page or site in a document window. Note that there will be some differences in the text and graphics when they are converted. These changes are usually comparable to how a page's appearance changes from one Web browser to another.
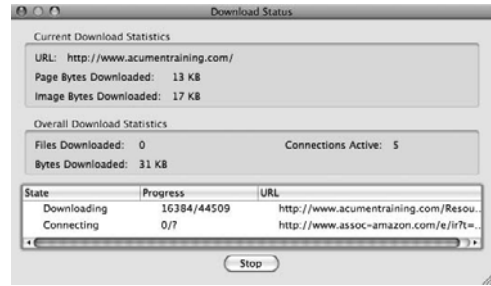
C As Acrobat converts the Web site to PDF, it shows you how the conversion is progressing.

Web Site Conversion Settings

The controls in the Create PDF from Web Page dialog **B** have the critical purpose of limiting the scope of your Web capture. At the extreme, they keep you from inadvertently trying to convert the entire World Wide Web into a single (large!) PDF file.

- **Get only n level(s).** Here you specify the extent to which Acrobat should grab Web pages that are the target of links on your selected Web page. A value of 1 says to get only the Web page whose address you have specified. A value of 2 says to get that Web page and any pages linked to by that page. A value of 3 additionally captures pages linked to by *those* pages, and so forth. Keep this number small. *Very* small. The larger the number of levels you specify, the exponentially longer the conversion will take.

- **Get entire site.** As it says, this option converts the entire site to PDF. I strongly recommend against selecting this option, because it can take an amazingly long time.

- **Stay on same path.** Like all files, the HTML files that make up a Web site reside in a directory on a hard disk—in this case, the Web server's disk. This option prevents Acrobat from following links that reside outside the target Web page's location or its subdirectories. I recommend choosing this option.

- **Stay on same server.** Acrobat won't follow links off your target page's server. I strongly recommend this option. Otherwise, for example, if the page you request has links to its sponsors, you may find yourself trying to convert all of Microsoft's Web site to a PDF file.
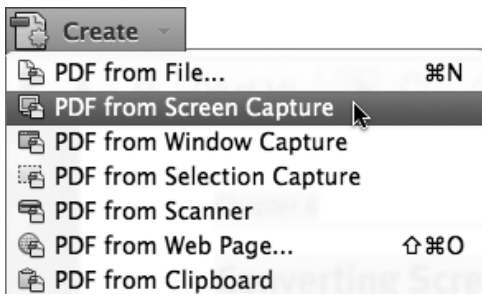
A On the Macintosh, Acrobat can capture parts of your computer screen and convert the image to PDF.

B When you capture a window, the mouse pointer changes to a camera. Cute.

Converting Screen Shots to PDF

PDF from Screen Capture is a Macintosh-only feature. When it's selected, Acrobat lets you capture the contents of a window, a region, or an entire screen to a PDF file. This is convenient for people who write computer documentation.

The directions below all send you to the Create button in the Quick Tools toolbar; keep in mind that these commands are also available in the File > Create submenu.

To capture an entire screen to PDF:

1. In the Quick Tools toolbar, choose Create > PDF from Screen Capture **A**.

   After a moment, Acrobat presents you with a document window containing an image of the entire screen.

2. Choose File > Save As to save this file to disk.

To capture a window to PDF:

1. In the Quick Tools toolbar, choose Create > PDF from Window Capture.

   The mouse pointer changes to a camera **B**. As the pointer moves over the windows open on the screen, the current window turns blue.

2. Click the window whose contents you want to capture.

   A document opens, containing an image of the window you clicked.

3. Choose File > Save As to save this file to disk.

To capture a region of the desktop to PDF:

1. In the Quick Tools toolbar, choose Create > PDF from Selection Capture.

   The pointer changes to a crosshair.

2. Click and drag a rectangular marquee around the area you want to capture. Acrobat uses a nonstandard marquee with this tool: You drag out a light gray area on the screen **C**.

   Acrobat presents you with a document containing the contents of the region you enclosed **D**.

3. Choose File > Save As to save this file to disk.
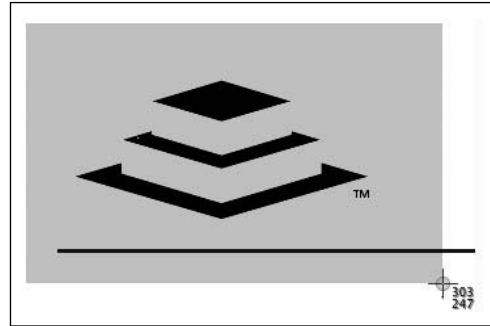
C When capturing a part of the screen, you drag out a light gray rectangle that indicates the capture area.
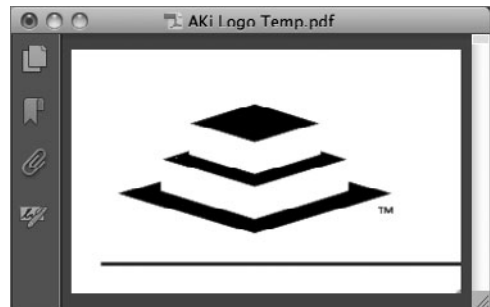
D The area of the screen you selected turns into a PDF image.

A The Combine Files dialog lets you choose several files of any type that you want to merge.
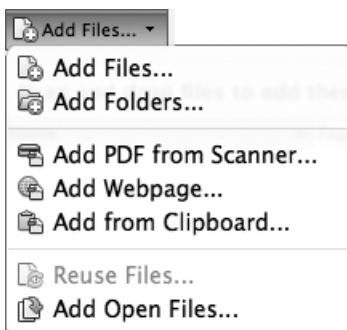
B You can combine files of any type, folders of files, data direct from a scanner, Web pages slurped up off the Web, or the contents of the clipboard into a single PDF file.

Merging PDF Files

Acrobat can combine multiple files into a single PDF file. The component files can be PDF files, TIFF files, EPS files, or files of any format that Acrobat can convert to PDF. This is extremely useful for combining, say, all the files associated with an invoice—the invoice itself, an expense report, scanned receipts, justifications for your hourly rate, letters from your lawyer—into a single file you can email.

To merge several PDF files into a single PDF file:

1. In the Quick Tools toolbar, choose Create > Combine Files into a Single PDF.

   The Combine Files dialog opens **A**. This dialog lets you choose a list of files to combine.

2. Choose one of the following from the Add Files drop-down menu **B**:

   ▸ **Add Files** lets you add individual files to the list.

   ▸ **Add Folders** lets you choose a folder, all of whose convertible contents will be added to the list.

   ▸ **Add PDF from Scanner** and **Add Webpage** run the scanner and Web conversion features, and then add the resulting PDF file to the list.

   ▸ **Add from Clipboard** converts the contents of the clipboard to a PDF file and adds the result to the list.

   ▸ **Reuse Files** lets you choose files inside a PDF portfolio.

   ▸ **Add Open Files** allows you to choose among all open files.

continues on next page

No matter which option you choose, Acrobat displays an Open dialog appropriate to the task **C**.

3. Repeat step 2 as often as needed, adding items to the list, until your list is complete.

The list of files currently selected is displayed in the Combine Multiple Files dialog. You can click the Move Up and Move Down arrows beneath the list to alter the files' order.

4. Select the Single PDF radio button in the upper-right corner of the Combine Multiple Files dialog.

We'll discuss the alternative, PDF Portfolio, in Chapter 6.

5. Click Combine Files.

Acrobat merges the files together and displays a standard Save dialog.

6. Specify a name for the new, merged PDF file and click OK.

Acrobat saves the new PDF file.

TIP In **A**, you see three File Size icons in the lower-right corner of the dialog; they let you choose a qualitative file size (small, medium, or large). These options mostly affect how aggressively images in your document are compressed. Clicking the "small" icon results in the greatest compression. Unfortunately, this compression also reduces the images' quality, so you want to treat these icons with a little caution. When in doubt, choose the "medium" icon.

Note that if there are no images in your PDF files, you probably won't see much difference among these options.

TIP Acrobat creates bookmarks in the merged file that take you to the start of each of the original documents. (See Chapter 2 for a reminder of how to use bookmarks.)
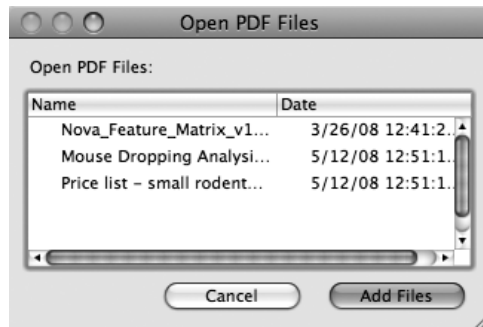
C Each of the Add options (files, folders, scanner output, etc.) presents you with an Open dialog appropriate to that task. This dialog is what you see when you add files to the list.

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