

Chapter 1: Discovering Essential Acrobat Information

In This Chapter

- ✓ **Discovering Acrobat and PDF files**
- ✓ **Knowing when to use PDF files**
- ✓ **Becoming familiar with the Acrobat workspace and tools**

Adobe Acrobat 8 provides a variety of tools for sharing and reviewing documents. Although the Adobe Creative Suite applications can create Portable Document Format (PDF) files without Acrobat, you can use Acrobat to create PDF files from programs that aren't part of the Creative Suite. You can also use Adobe Acrobat to enhance PDF files, regardless of how they were created. You can add security to restrict features such as printing or editing, change the page order, merge documents together, add comments and annotations, and even create PDF forms.

In this chapter, you find out why you may want to create PDF files and acquaint yourself with the Adobe Acrobat tools and workspace. You'll see how easy it is to navigate through PDF files using the navigational tools, tabs, and viewing options in Acrobat. In the following chapters of this minibook, you explore how to use Acrobat to create Adobe PDF files from documents produced in a variety of programs and discover ways to enhance your Adobe PDF files.

Working with PDF Files

Adobe Acrobat is used to create Adobe PDF files, review existing PDF files, and modify existing PDF files. When you work with programs in the Adobe Creative Suite, such as Adobe InDesign, and you want to share your work with colleagues or clients, you need to find a way to deliver the documents to them. Of course, you can always print your documents and send them via courier, the mail, or even fax. But all these methods take time and don't provide for easy collaboration. This area is where PDF files are helpful.

Many people prefer to receive documents electronically, but there's a small problem: All the people with whom you need to share files probably don't have the same software you use. They may not all have InDesign — or whatever part of the Adobe Creative Suite you're using. PDF provides a common file format that everyone can open to review your documents. PDF provides

an application independent method for viewing your files, regardless of what computer program was used to create them. The PDF file format also lets Mac users share their files with Windows users, and vice versa. Additionally, Acrobat provides extensive tools for review, commenting, and marking up so that you can easily collaborate on a project without modifying the original document.

You can view PDF files on many different computer types, including Macintosh computers, Windows computers, Unix computers, and even some cell phones and handheld PDAs. Because the software to view Adobe PDF files is free, you can be assured that those receiving your files don't need to purchase any special software. In fact, the odds are quite good that most users already have this free software, called Adobe Reader, as more than 500 million copies have been distributed. Adobe has actually released the underpinnings of PDF to all computer software makers, allowing them to freely create different programs to read and create PDF files.

What makes PDF so useful is that it provides a true reproduction of original documents. The fidelity of PDF files is so good that the Internal Revenue Service uses this format to distribute tax forms online. Likewise, many banks, insurance agencies, and financial services firms use PDF as a method for distributing documents. We even use PDF files to send books like the one you're reading now to the printing plant.

Although PDF files provide a high-quality representation of an original file, they're more than just a picture of the document from which they were created. PDF files retain the high-quality appearance of text so that they print clearly and are searchable. Logos and illustrations created using Adobe Illustrator retain the same high-quality appearance within a PDF file. PDF files also may contain the intricate details that are captured in bitmap images, such as those edited using Adobe Photoshop — but PDF files are able to keep both bitmap and vector information together in the same file, making them a great choice for distributing documents electronically. You don't have to sacrifice quality to distribute a file electronically. You do need to know a few things about Acrobat to create the right type of PDF files for your needs, though. The PDF file you'd send to a printer may be too big for anyone to post on a Web site or send as an e-mail attachment, for example.

One new feature in Acrobat 8 lets you create PDF packages. A PDF package contains multiple PDF files and can also contain other file types that aren't PDF files. A PDF package may contain a few pages from a PowerPoint presentation, part of a spreadsheet, a CAD drawing, some text documents, perhaps an e-mail or two, and so on. This great flexibility is a powerful enhancement to Adobe Acrobat.

Adobe Acrobat is a tool for distributing documents; it's *not* a design tool. You generally don't use Acrobat to build new documents, although Acrobat 8 does let you create a blank page and put text and objects on that page.

However, Acrobat is meant to be a medium for sharing files, not for creating them. Simply put, you don't use Acrobat to create new documents. But Acrobat is still incredibly useful. Using Acrobat, you can

- ◆ Share documents with users who don't have the same software or fonts that you use.
- ◆ Review and mark up PDF files that others send you. You can also enable a PDF file to be reviewed by users with the free Adobe Reader software.
- ◆ Combine documents created in other programs. You can use Acrobat to merge PDF files that may have been originally created in different programs.
- ◆ Create a PDF Package. You can combine various file formats into a single PDF Package and yet retain the files in their original file formats.
- ◆ Edit Adobe PDF files.
- ◆ Apply security to PDF files when you don't want them changed.
- ◆ Add interactivity to PDF files by infusing them with sounds, movies, and buttons.
- ◆ Create interactive forms, where you can collect information without requiring a user to print, write, and then fax or mail information back to you.

We cover these capabilities throughout the rest of this minibook.

Knowing When to Use Adobe PDF Files

So when does it make sense to use Adobe PDF files? Here are some examples:

- ◆ **When you've created a spreadsheet that includes numbers, formulas, and tables that you don't want others to edit:** Your recipients may have the same software you used to build the document, but you can keep them from editing the original spreadsheet file by distributing it as a PDF file.
- ◆ **When you've created a presentation that you want others to deliver, but you work on a PC and some of them use Macintosh systems:** By converting the document to PDF, you don't have to worry about issues that can arise when sharing files between different computer types. For example, fonts are typically included within PDF documents and can be used on any computer systems with the free Adobe Reader or the complete Adobe Acrobat software.

In addition, by sending the presentation in PDF format rather than in the original presentation file format, you don't have to be concerned that the recipients may edit the file.

- ◆ **When you have a sensitive document that will be shared only with certain authorized colleagues:** If you have a document containing information that you don't want unauthorized persons viewing, you can add security to a PDF file by using Adobe Acrobat's security tools. Using these options, you can require users to enter a password to view the file, and you can limit other features, such as the ability to print or edit the document.
- ◆ **When you want to review a document quickly and efficiently:** When documents need to be reviewed or approved, Acrobat really shines. You can use commenting, markup, and annotation tools to add suggestions and edits to a file, regardless of where it was created. You can even combine comments from multiple reviewers into a single document.

Introducing the Adobe Acrobat Workspace and Tools

To take advantage of all that Adobe Acrobat has to offer, you'll want to discover the workspace and tools Acrobat uses. Adobe has significantly revised the Acrobat 8 interface. Unlike previous versions of Acrobat, which opened with a blank workspace, Acrobat 8 opens with a Getting Started screen. It provides eight possible tasks: Create PDF, Combine Files, Export, Start Meeting, Secure, Sign, Forms, and Review & Comment. These tasks are also incorporated in Acrobat's toolbar once you begin working with your document. You can click a task in the Getting Started window, or if you just want to review a file, you can close the Start Up window like you would any other document window by clicking the Close Window button in the corner.



The Getting Started window appears each time you open Acrobat unless you click the Do Not Show At Startup check box.

Once you open a document, you see the Acrobat workspace, which is divided into three areas: the document window, the toolbar well, and the navigation panes. When you open a PDF document using Acrobat, you can use the toolbars, buttons, and navigation panes to work with and manipulate the PDF file. For example, a PDF file may contain multiple pages. You can use the navigational buttons or the Pages navigation panel to move between pages and then use commenting tools to mark up the file.

The toolbar provides useful information for navigating through your document, including:

- ◆ **Current page and total pages:** Click in the area showing the current page, type a different page number, and press Enter (Return on a Mac) to view a specific page.
- ◆ **Previous Page/Next Page:** Use these navigational buttons to skip forward or backward by one page.

The Zoom tools

If things are a bit too small for you to see clearly, increase the magnification used for viewing pages with the Zoom drop-down menu in the toolbar. Using the toolbar, select from a preset magnification by choosing the drop-down list showing magnification percentages. The preset magnification choices are available to the right of the current magnification level, which is displayed in the menu bar. You can use the minus (–) and plus (+) symbols to the left of the current magnification level to zoom out or in from the current magnification.

The Marquee Zoom tool is the magnifying glass icon, and you can use it to identify specific portions of a page that you want to magnify. Select this tool and then click and drag around a portion of the page to increase the magnification. You can also click multiple times on an area to increase its magnification, but clicking and dragging a box with the Zoom In tool is generally a much faster way to focus on a portion of a page you want to view. You can change the Zoom In tool to the Zoom Out tool (magnifying glass with a minus sign) by selecting the Marquee Zoom tool and Alt+clicking (Option+clicking on a Mac) in the document window. The magnifier's plus (+) sign changes to a minus (-) to indicate that you're decreasing the document's magnification. But it's usually faster to choose a preset zoom percentage.

To the right of the magnification percentage box are page icons that you can use to change the page magnification:

- ◆ **Scrolling Pages:** Use this button to avoid scrolling from left to right when reading a document. The view is changed to fit the document's width in the available space on your display, making it necessary to only scroll up and down on a page. This also sets the page view to display the top or bottom of adjacent pages. When you scroll and reach the bottom of one page, the top of the next page becomes visible.
- ◆ **One Full Page:** Use this button to fit the current page within the available screen space on your monitor. For smaller documents, such as a business card, the magnification is increased. For larger documents, the magnification is generally decreased unless you have a large monitor. When viewing pages in the Fit Page mode, only one page is displayed at a time. This mode is good for viewing the entire display of a page layout.

Toolbars

The toolbars in Acrobat 8 are now customizable, so you can combine functions from different toolbars to meet your needs.

For example, Acrobat also includes several additional tools for navigation, which are accessible by choosing View⇨Toolbars⇨More Tools. In the More Tools window that appears, select the navigation tools you'd like to have displayed in the toolbar. The Selecting and Zoom Toolbar section displays the navigation tool choices that can be displayed.

Less than half of the toolbars are visible in the default Acrobat display. You can add to the tools that are displayed or limit them by clicking the check box next to those you want to display or hide in the More Tools window. Toolbars that have a check mark next to their names are visible, while those without a check mark aren't visible.

Customizing the location of toolbars on your screen can make it easier for you to work with PDF files using Acrobat. For example, you may want all the tools for navigating through your documents in one section of the toolbar well. To achieve this, you can rearrange the location of specific toolbars.

Along the left edge of every group of tools is a dotted double line. By clicking and holding onto this edge with your mouse, you can drag any toolbar to a new location on your screen. This new location can be within the same area holding the other toolbars, or anywhere in the Acrobat work area. If you pull a toolbar out of the docking area, it becomes an independent, floating toolbar. You can reposition or drag floating toolbars back into the docking area when you're finished working with them. You can also close a floating toolbar by clicking its Close Window button. You can place toolbars along the left or right of the Acrobat work area — turning either side of the Acrobat workspace into a docking area for toolbars.



Although the flexibility of placing toolbars anywhere you like is useful, it may lead to a chaotic work environment. Instead of leaving toolbars all over your screen, you can have Acrobat clean up the workspace by choosing View⇨ Toolbars⇨Reset Toolbars.

Toolbars contain both tools and buttons. For example, you choose the Marquee Zoom tool to change the magnification by clicking or selecting an area of the page. Buttons perform an immediate task, such as printing, saving, or applying security to a PDF document. In general, most of the task buttons are on the top row of the docking area, immediately below the menu bar, and most of the tools are on the bottom row — but you can move these toolbars.



Some tools and task buttons also include additional options that you can access through drop-down lists within the toolbars. Tools and buttons that contain additional choices are noted by the small triangle immediately to the right of the icon. Click this small triangle, and you see a menu listing the additional choices for that tool or button.

Viewing modes

Acrobat provides several viewing modes that control how the entire document is displayed. You can choose which viewing mode is used by choosing View⇨Page Display and selecting the viewing option you want.

The viewing modes are

- ◆ **Single Page:** This mode displays only the current document page on-screen and does not show any adjoining pages. When you scroll to the top or bottom of the current page, other pages aren't visible at the same time as the current page.
- ◆ **Single Page Continuous:** With this mode, you can see the current document page, and if you scroll to the top (or bottom) of the current page, the adjoining page is also visible. If you reduce your page viewing magnification, many document pages are visible.
- ◆ **Two-Up (previously known as Facing):** Use this mode to see pages as a *spread*, where you can view both the left and right side of adjoining pages at the same time. When you have documents with pictures or text that spans a pair of pages, use this option to see the pages presented side-by-side in Acrobat. As with the Single Page mode, other pages that go before or fall after the spread aren't visible — only the one pair of pages is visible on-screen, regardless of the magnification or scrolling.
- ◆ **Two-Up Continuous (previously known as Continuous-Facing):** If you have a document with many pages containing text or pictures on their adjoining pages, you can use this mode to scroll from one pair of visible pages to the next. When the Continuous-Facing view is selected, you can see adjoining page spreads. This option is identical to the Facing option, but it also shows pages above or below the spread you are presently viewing.

If you have pages where images or text go across pages, the Two-Up choice is useful. By default, the pages generally display incorrectly. For example, a magazine will display the cover (page 1) and page 2 together, instead of pages 2 and 3. To correct this, you need to choose View⇨Page Display⇨Show Cover Page During Two-Up.



You can add viewing modes as menu buttons using the More Tools window, described earlier in the Tools section.

Additional viewing options

Acrobat has two options for changing your document display.

- ◆ **Full Screen Mode (View⇨Full Screen Mode):** You can use the Full Screen View option to hide all menus, toolbars, and other parts of the Acrobat interface. This option is useful if you want to focus on the document being displayed, not the program being used to view it. Use this mode, for example, when you've a converted PowerPoint file to a PDF document and want to deliver the presentation using Acrobat. If you're viewing a document in the Full Screen Mode, press the Esc key to return to the regular viewing mode.



You can set a document to automatically open in Full Screen Mode by choosing File⇨Properties and choosing this option from the Initial View panel of the Document Properties window. Additionally, you can choose Edit⇨Preferences and select the Full Screen option along the top left side of the Preferences window to control various aspects of the Full Screen Mode. Some choices include the transition between pages and whether pages advance automatically, allowing you to create a self-running PDF presentation.

- ◆ **Reading Mode (View⇨Reading Mode):** With so many toolbars, they sometimes get in the way. Reading Mode temporarily hides all your toolbars.

Navigation panels

Acrobat offers a variety of panels that are helpful when navigating through PDF documents. The term *panel* may be a bit misleading because similar options are called *palettes* or *panes* in the other Adobe Creative Suite programs. Regardless of the name, however, you use them to get around PDF files more easily.

The navigation panels are visible along the left side of your document window as small icons (refer to Figure 1-2). Click an icon to make its panel visible. For example, click the Pages icon to display thumbnail-size representations of each page, as shown in Figure 1-5. You can click a thumbnail page to have that page displayed in the document window. You can also choose View⇨Navigation Panels to access the panels. There are 14 panels: Articles, Attachments, Bookmarks, Comments, Content, Destination, How To, Info, Layers, Model Tree, Order, Pages, Signatures, and Tags.

Many panels have more advanced uses that are covered in later chapters of this minibook. In this chapter, we provide you with a brief understanding of how you can use the Pages tab to more easily navigate through a PDF document. Just do this:

- 1. Make sure that the Pages panel is visible by clicking its panel icon.**
- 2. In the Pages panel, click any page thumbnail to navigate directly to that page.**

A dark border appears around the selected page. In the lower-right corner of the page is a very small red box.

- 3. Drag the small red box up and toward the left, in a diagonal movement, to focus the magnification on a smaller portion of the page.**