

PDFs - Essential Tips, Features, and Tools



K2 Enterprises – www.k2e.com

www.TotallyPaperless.com

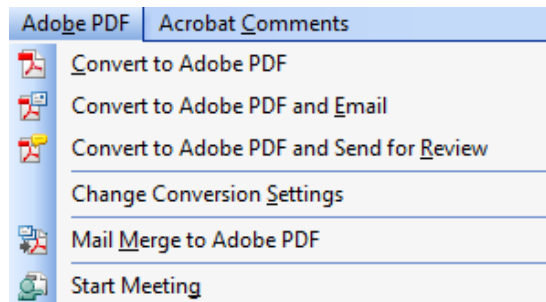
This session will demonstrate new and little used features as well as reinforce a few of the most popular features of Adobe Acrobat using version 8 for demonstration.

How to Create a PDF

Using PDFMaker to Create a PDF File

Acrobat installs (Windows Only) both an Acrobat PDFMaker toolbar and an Adobe PDF menu in many popular authoring applications. You can use either the toolbar buttons or the Adobe PDF menu to create a PDF, but the menu also provides access to conversion settings. Although many of the conversion options are common to all authoring applications, a few are application-specific. The following example is the Acrobat PDFMaker 8.0 menu as it would appear in Word 2003 or Excel 2003.

The Icon Tool Bar allows you to select one of two actions quickly. The left icon is to create a PDF file from the currently displayed document. Depressing that button will produce the following Window. Note that the theme of the window may vary slightly depending on the version of Windows Operating System you are running, but the basic information is consistent. The rightmost button saves the document and sends it for review in three simple steps. The first step below is to specify the file to be sent for review. In most cases, it will be the currently open document. However, clicking on the browse button allows you to select any file of your choice. As we mentioned above, Acrobat also adds a menu item to the menu bar.



Adobe Menu Item in Microsoft Office

The most important, and possibly least used, of the Adobe PDFMaker menu bar options is **Adobe PDF Change Conversion Settings**. This feature opens the Acrobat PDFMaker window and allows you to specifically set how you want to output the file as well as security, Word, and Bookmark settings. We advise you to take a few moments to familiarize yourself with this customization feature.

One of the most important strengths of PDFMaker is that it understands things like Styles from Microsoft Word documents, for example, and can convert formatting information such as Table of Contents and Headers into bookmarks in PDF. For those not familiar with Styles and Formatting, the Styles box allows you to manage how data is displayed on the document. You can set font type and size and even designate certain text as a header and have different levels of headers.

Using Adobe PDF Printer to Create a PDF File

Adobe has included a PDF printer beginning with initial versions of Acrobat. Earlier versions were extremely limited, and there were issues with fonts and graphics printing exactly the same as the source document appeared. Most of these issues have been corrected, and, while Adobe PDF printer does create a very simplified 2D file, some metadata, such as hyperlinks, are maintained.

Acrobat installs Adobe PDF printer in the **Control Panel, Printers** folder, and you can view from **Start, Printers**. This printer can be used anytime you perform a **File, Print** function from any Windows application. When selected, the Adobe PDF drivers will ask you for a file name to save the PDF file to and then convert the document and save it. There are a number of free PDF Printer solutions available from providers other than Adobe.

Other Ways to Create a PDF

Acrobat also provides a number of options within the application to create PDF files. These are accessed from the **File, Create PDF** menu drop down or from the **Create PDF** icon on the **Task** toolbar. We will quickly review a few of the lesser known options such as From a Web Page, Blank Page or Clipboard Image.

Create PDF from Clipboard Image

This could come in handy if you are working in a document or viewing an image on a page and want to create a quick PDF of it. Simply copy an image to the clipboard-- a quick Ctrl key plus the letter C (Ctrl+C)-- should do it. Note that this command only works for images, not text data. Then, open Acrobat and select **File, Create PDF From Clipboard Image**. Of course, we recommend you use this wisely and legally so as not to violate pertinent copyright laws.

Create a PDF from a Blank Page

New in Acrobat 8 is the ability to create a PDF from a blank page. By selecting this option Acrobat will generate a single blank page. You may then use the touch-up tool, typewriter, or other tools to create information on this blank page and save it. This feature may be used to create separator pages on the fly that can be inserted or combined with other files or for other purposes we have not considered.

Software to Create and Edit PDF Documents

Nitro^{PDF} Software

Nitro PDF, www.nitropdf.com, is a strong competitor to Acrobat in features and functions. These solutions run \$49 and \$99 respectively. Both solutions allow you to download and test the product before purchasing. Both are available for multi-user licensing at reduced costs.

Nuance

Nuance, www.nuance.com, PDF Converter Professional 5 from Nuance converts all industry Windows documents, drawings, and images into industry-standard PDF files, instantly creating PDF documents. PDF Converter Professional 5 runs \$99 for an individual license and multi-license packages are available.

ABBYY

ABBYY, www.abbyy.com, PDF Transformer for PDF Conversion, is the tool of choice for those needing to convert PDF files to other native format such as Excel. The product is also fully tested for Section 508 (Workers with Disabilities Act) compliance. Single user pricing is \$99.99.

Miscellaneous PDF Solutions

CutePDF

CutePDF Writer, www.cutepdf.com, is a free download. It uses Ghostscript to capture print data to send to a PDF file. It is very unobtrusive and one of the best with which to work in our experience. Further, it is FREE. While the free version will satisfy users who just need a quick PDF produced, take a look at CutePDF Professional (includes CutePDF Form Filler) for a rather impressive list of features for only \$49.95.

Arts PDF

Arts PDF, <http://artspdf.com/>, offers a wide range of PDF creation, editing, review, and publishing solutions. Publishing tools are just one of the strengths of this offering. The ARTS PDF Tools, part of the ARTS PDF Aerialist solution, can be used to create powerful JavaScript macros and to create custom Toolbars!

AcroButtons

AcroButtons, <http://www.windjack.com/products/acrobuttons.html>, is a \$99 tool which can be used to create custom toolbars and icons for Acrobat. These custom buttons may be linked to stamps and other functions to your liking. The product is easy to use and custom toolbar icons independent of AcroButtons so once created they may be embedded into any Acrobat product and may even be attached to a document so the toolbar only shows when the document is open.

FoxIT Reader

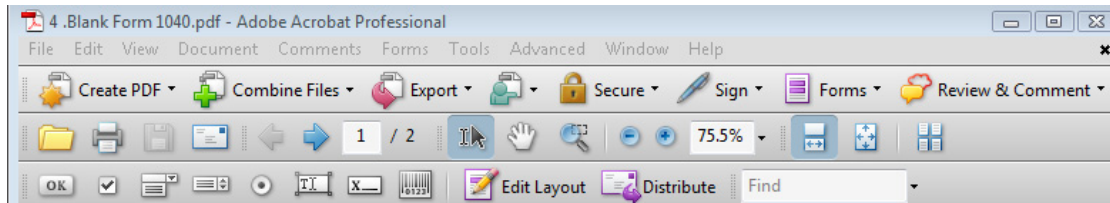
Foxit Reader is only 2.1 MB which is a fraction of Acrobat Reader 22 MB size. Breezing-fast: When you run Foxit Reader, it launches instantly without any delay. Foxit Reader allows you to draw graphics, highlight text, type text and make notes on a PDF document and then print out or save the annotated document. Save fillable forms after filling them out so you can continue anytime. Text converter: You may convert the whole PDF document into a simple text file.

http://www.download.com/Foxit-PDF-Reader/3000-2079_4-10313206.html

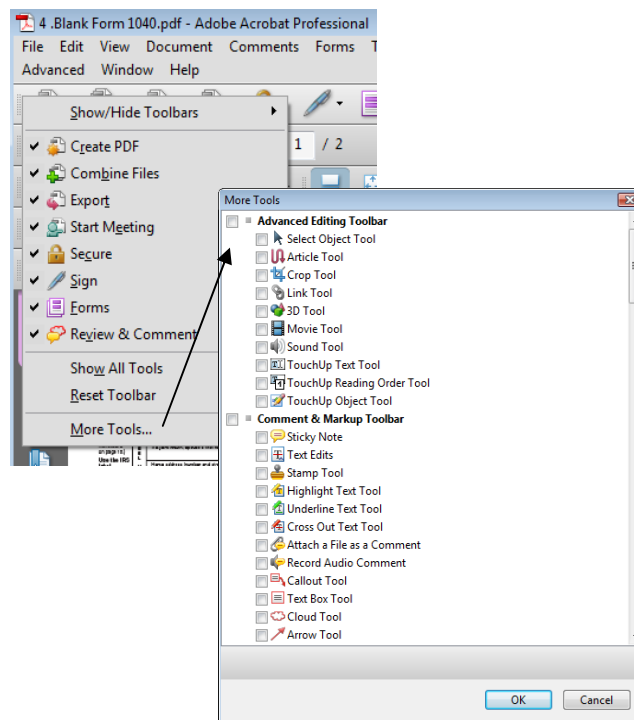
Looking for other PDF solutions? There are a number of solutions for Linux, Unix, Apple Mac OS, Palm and Handheld devices. To find more solutions search;

www.tucows.com
www.downloads.com
www.planetpdf.com
www.acrobatusers.com

Using the New More Tools menu



Adobe has added the More Tools menu, which gives the user complete control to determine which icons will appear on toolbars and which toolbars will be displayed. The More Tools features can be activated by right clicking anywhere within the tool bars and selecting More Tools... from the bottom of the list. Using the More Tools screen, click the check boxes for those Tool Bars you wish to activate and click check boxes for features you use.



More Tools Menu Option in Adobe

Using the New Navigation Pane

In previous versions of Acrobat the screen was composed of three panels; the Navigation Panel, the View Panel and the Help or How to Panel. In version 8 these are replaced with the Navigation Pane down the left side. When you click on an icon in the Navigation Panel, the icon expands to show the appropriate information, a much cleaner and more space conscious approach than previous versions.

Enable Advanced Features in Adobe Reader

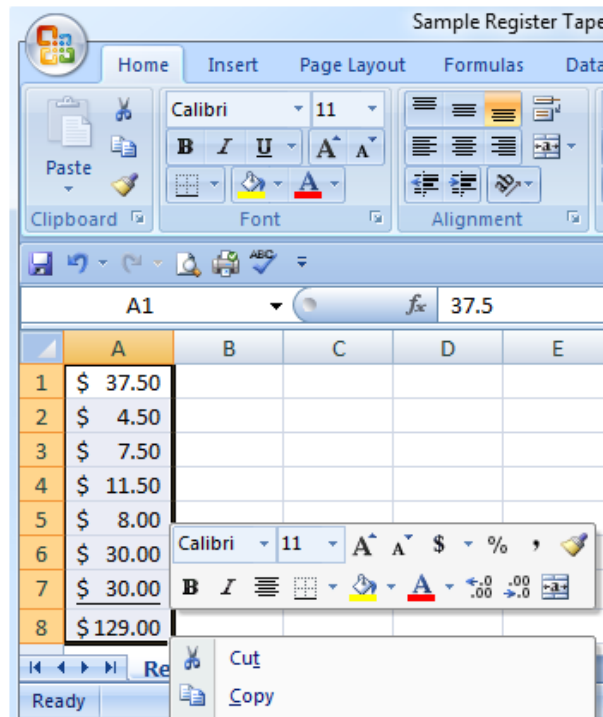
Advanced, Enable Usage Rights in Adobe Reader... After you have created a PDF, you may enable anyone using the free Adobe Reader version 7 or 8 software to participate in document

reviews, fill and save electronic forms offline, and digitally sign documents. This was a new feature in Acrobat Professional 7 and is the reason we recommend that your staff, clients, and customers update to the latest version in order to benefit from this feature. This should be the last thing you do to the PDF before distribution. It is recommended that you make a copy of the PDF before enabling it as once enabled, the process cannot be reversed and there are certain functions which cannot be applied to a PDF once it is enabled.

Using Comments to Add a Register Tape

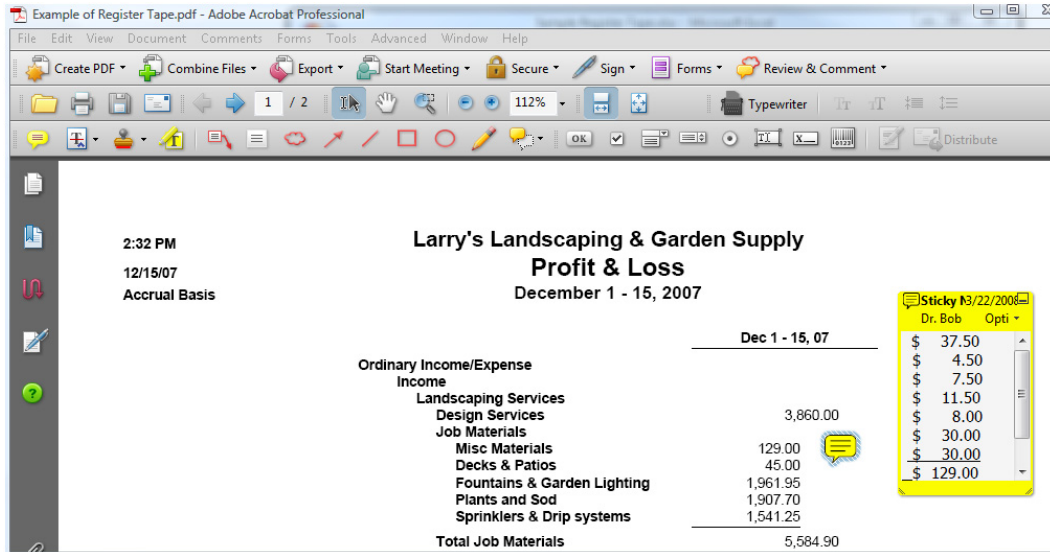
Accountants are often lost without their register tape from their adding machine. Some even try and scan the tape and add it to the PDF file. Too much trouble! There are several ways you can emulate your 10-key in a PDF. The most general and easy way is to use Excel.

1. Enter your list of numbers, including a column for labels if you like into Excel. Foot and check the values and when you are ready to keep you're your "tape," highlight the area and either Ctrl+C to copy it to your clipboard, or Edit copy from your dropdown menu or ribbon bar.



Register Tape Created in Excel

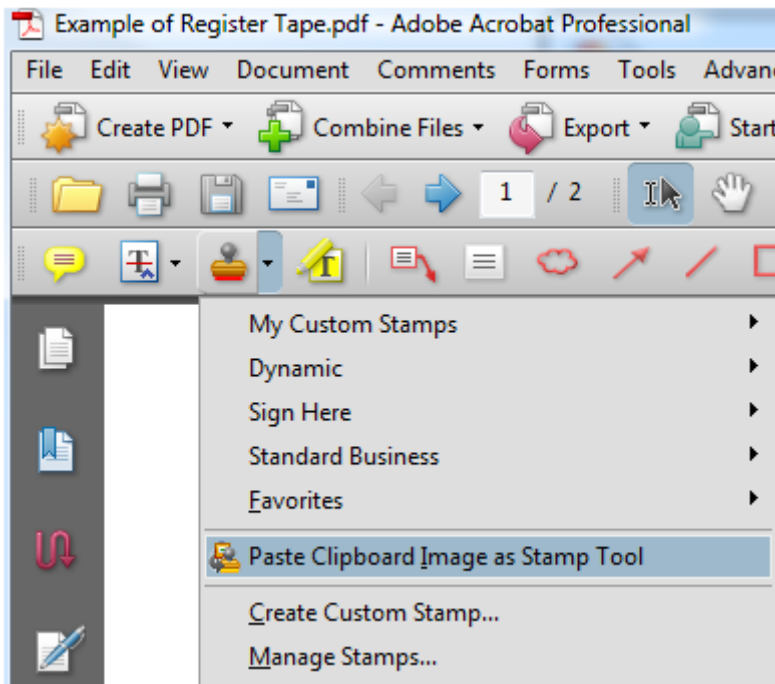
2. Open the target PDF in Adobe
3. Select the Sticky note tool by clicking on the PDF where you want the tape to be.
4. Click inside the Sticky Note and Ctrl+V to paste the data. The formatting may be a little off, so if you want pretty, you may have to spend a moment or so adjusting the look. Most accountants simply want to post the detail and this works fine.



Paste Clip from Excel into PDF

Another option is to paste the register tape as a custom stamp from the clipboard. Follow steps one and two above and then:

1. Open the PDF file and from the Stamps Icon select Paste Clipboard Image as Stamp Tool. If there is nothing on the clipboard to paste this option will be grayed out so go back and copy the range to your clipboard again.



2. Click on the location where you want the tape to display. This option is fast and works well for graphics, but you may have problems with the font size for a list of numbers.

The option we like the best is to use the Acrobat 8 Call Out tool in place of the of the Sticky Note. The list formats correctly and Accountants tell us it looks more like a real tape.

1. Follow steps one and two above to copy your register tape to the clipboard.
2. Select the Call Out tool from the menu bar and place it on your document where you wish the tape to display.
3. Click inside the Call Out tool and Ctrl+V to paste your range.

Larry's Landscaping & Garden Supply		
Profit & Loss		
December 1 - 15, 2007		
Dec 1 - 15, 07		
Ordinary Income/Expense		
Income		
Landscaping Services		\$ 37.50
Design Services	3,860.00	\$ 4.50
Job Materials		\$ 7.50
Misc Materials	129.00	\$ 11.50
Decks & Patios	45.00	\$ 8.00
Fountains & Garden Lighting	1,961.95	\$ 30.00
Plants and Sod	1,907.70	\$ 30.00
Sprinklers & Drip systems	1,541.25	\$ 129.00
Total Job Materials	5,584.90	
Labor		
Installation	7,261.00	
Maintenance & Repairs	285.50	
Total Labor	7,546.50	

Register Tape Inside Call Out Tool

For those that do this a lot, don't want to take the time to use Excel to create your list, or just miss the feel of a calculator, you might try one of the number of 10-key utilities available such as myOwn10-Key (Google for site to download from.) This little program is under \$20 and looks just like a calculator, it even sounds like one.

Using the Touchup Tool

The TouchUp tool is selected from either the **Advanced Editing** toolbar or from the menu dropdown **Tools, Advanced Editing, TouchUp Text Tool**. The TouchUp Text tool is only intended for minor changes and not for editing as you would with a word processor. The TouchUp Text tool is useful for making quick changes that perhaps were not caught in the source before the PDF was created. These include spelling errors, changes in amounts, and minor work modification.

If you are excited about having the ability to modify text in a PDF file, consider the next example.

Larry's Landscaping & Garden Supply	
Profit & Loss	
December 1 - 15, 2007	
	Dec 1 - 15, 07
Ordinary Income/Expense	
Income	
Landscaping Services	
Design Services	3,860.00
Job Materials	
Misc Materials	129.00
Decks & Patios	45.00
Fountains & Garden Lighting	1,961.95
Plants and Sod	1,907.70
Sprinklers & Drip systems	1,541.25
Total Job Materials	5,584.90

P&L Before Using TouchUp Tool

Larry's Landscaping & Garden Supply	
Profit & Loss	
December 1 - 15, 2007	
	Dec 1 - 15, 07
Ordinary Income/Expense	
Income	
Landscaping Services	
Design Services	6,860.00
Job Materials	
Misc Materials	129.00
Decks & Patios	45.00
Fountains & Garden Lighting	1,961.95
Plants and Sod	1,907.70
Sprinklers & Drip systems	1,541.25
Total Job Materials	8,584.90

P&L After Using TouchUp Tool

How can you tell if someone has modified or changed a document? One way might be to use the **Advanced, Compare Documents...** function from the dropdown menu to compare two documents.

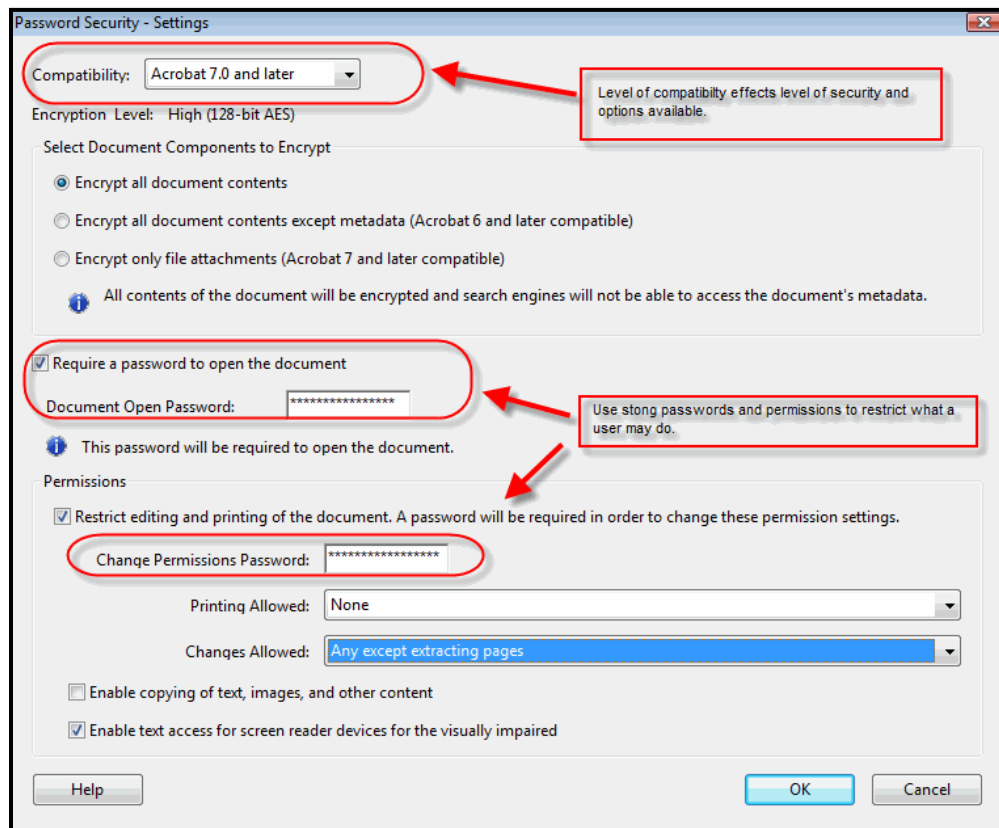
Using the Typewriter Tool

The Typewriter tool was added to the Acrobat 7.05 release. If you do not find the Typewriter tool, be sure to check your version release, **Help, About Adobe Acrobat...** The Typewriter tool is accessible from either the menu dropdown under **Tools, Typewriter, Typewriter** or from the **Typewriter** toolbar. If you are going to use the Typewriter tool for creating Tick Marks and other review annotations, it is a good idea to turn on the toolbar. The **T_T** and **T_T** icons are used to make the text

larger and smaller. You do not have the option to change the font itself. You can also adjust character line spacing, and that is about it.

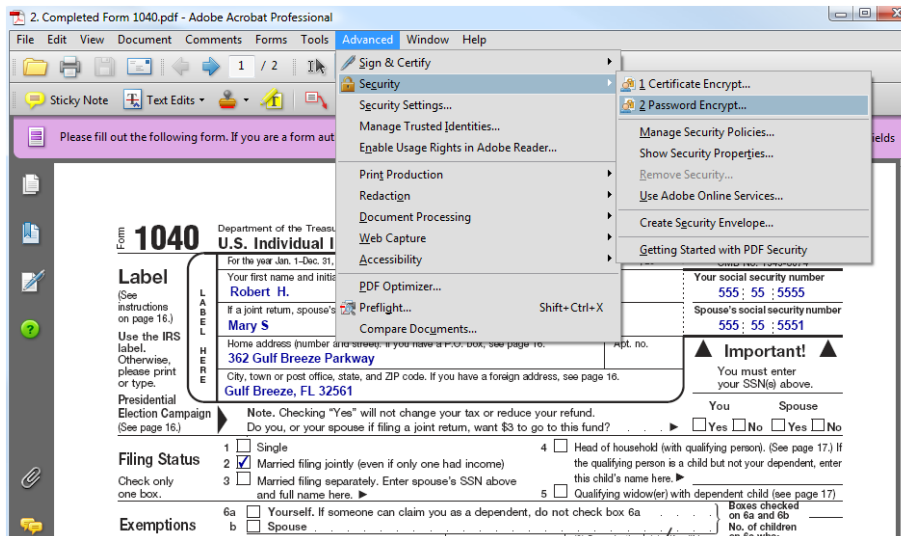
Password Security

To quickly password a PDF file, open the file and select **File, Properties**. This will open the Document Properties window. Click on the **Security Tab** and select **Password Security** from the Security Method list box. This will open the **Password Security – Settings** window. From here you may set, or change the documents password settings.



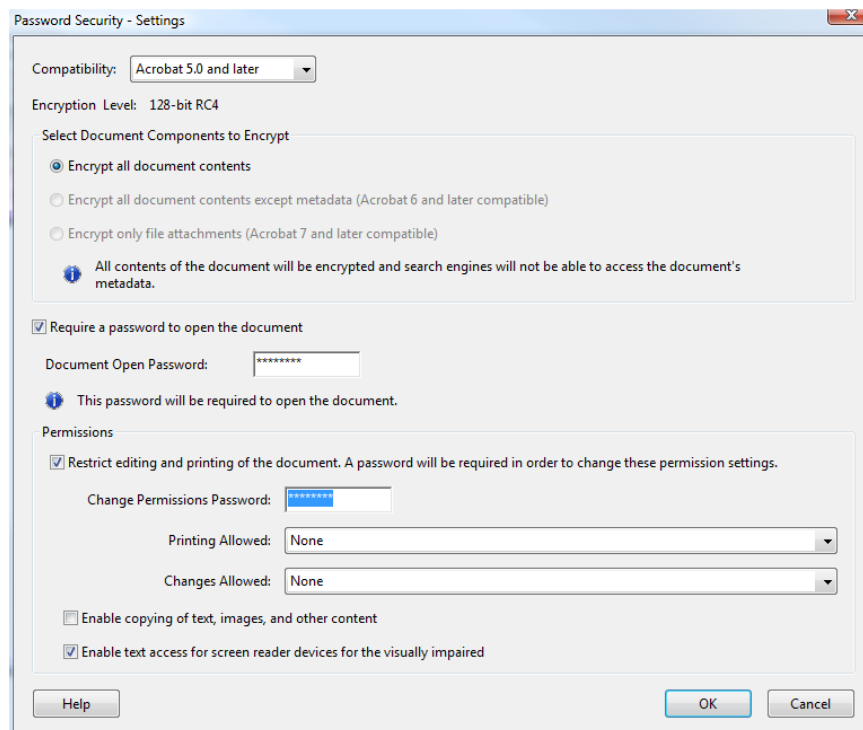
Password Security

If you know you are setting Security for the first time, select Advanced, Security, Password Encrypt... from the dropdown list.



Select Password Encrypt

You will then be presented with the Password Security – Settings window and should complete all appropriate entries.



Password Security - Settings

Adobe recommends you do a **File, Save As** and save the file as a different name, unless you are certain you will remember the password, and you want to secure all copies of this document. If you are sending the file to someone else, it is not wise to include the password to open the protected document in the same package as the document. Send the password separately, or we recommend

that accountants set up agreed upon passwords well in advance with the client and change these during the annual review meeting. This also helps instill a sense of privacy in clients and makes them more aware of the importance of securing digital information.

Once the document is saved, the password and permission protection will go into effect when you close and open the protected file. To check your document properties, click on **File, Properties**, select the **Security** tab, and review the document restrictions. When you open the protected document, you will be asked for the password to open. If you attempt to apply an unauthorized change to the document, you will receive an appropriate message.

You can only change the settings from the Document Properties window, and you will be asked for the password to change settings. The password to open the document and the password to change settings must be different.

Before you breathe a sigh of relief that your document is now protected, you should know that even Adobe admits that this level of security can be broken. There are many web sites that offer software to break password protection, such as www.lostpassword.com. Consequently, we need to take our security to an even higher level: it is time to learn about Certificate Security. However, before we do that, you need to create a certificate and learn how to use it.

Using Redaction to Remove Sensitive Data

What sensitive information is hidden inside a PDF file? The fact that you may not know is a good reason for concern. Acrobat version 8 includes a much improved Examine Document features that allow you to permanently remove metadata, hidden layers, and other concealed information from the document. It is recommended that you save the document with a different name if you wish to preserve a copy of the document before the information is removed.

The Examine document tool is very useful if you are sending a PDF to someone outside your organization, or if you are posting a PDF document on the Internet and are not sure who might be accessing the document. The Redaction tool is available from the **Advanced, Redaction** dropdown menu or from the **Redaction** toolbar.

When you click on **Mark for Redaction**, you will be greeted with a tip screen for using the Redaction tool. Read this screen carefully. Once Redaction is applied, you will be prompted to save the file under a different name. If you fail to do this and save the file over the original, the redacted data will be lost and is not recoverable. Once you have redacted text or images, you then select **Apply Redactions**. Heed the warning to save your file as a different name. After redactions have been applied, you will be given the option to review what was done and to make final adjustments. Once you have finalized changes, you will be given a message that the changes are complete.

PDF Optimizer

PDF Optimizer, **Advanced, Print Production, PDF Optimizer...** provides settings for reducing the size of a PDF file. Some of the PDF Optimizer settings are comparable to the settings that are available when you create a PDF file using Acrobat Distiller. Whether you use all of these settings or only a few depends on how you intend to use the files and on the essential properties a file must have. 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. The Audit Space Usage function is on the PDF Optimizer screen and provides the user with the current file. The Reduce File Size command may also be used to reduce the size of a file, **Document, Reduce File Size**.

Using the Organizer

Adobe introduced the Organizer in Acrobat 7.0 as a way for Acrobat users to organize and manage large volumes of PDF files. The organizer is composed of three panes:

- Categories Pane - History, Favorite Places and Collections,
- Files Pane - recently viewed files based on selection from the Category Pane, and
- Pages Pane - thumbnails of the current active file from the Files Pane.

Creating and Working with Collections

If you have worked with Binders in any Audit program or the Microsoft Office Binder from several years ago, you are familiar with how Collections is intended to work. If we assume that you may be working on a complex audit, review, or project that utilizes many PDF files stored in multiple locations, then you would benefit from creating Collections.

First, right click on **Collections folder** and select **Create a New Collection**. An empty folder is created with a window for you to apply a name. We have called the Collection "Sample Collection." Next, right click on the new folder and select **Add Files...**. You will be presented with an Explorer window to browse and select files to add. You may select multiple PDF files from a single folder, but you will have to repeat **Add Files...** for multiple folder selection. Remember that no copies of your files are made. Organizer is simply a database used by Acrobat to remember where your documents are.

Creating Indices and Catalogs

As the volume of electronic files store and maintain increases how do we find just the exact information for which we are looking? You can also use search engines such as Windows Search or Google Search, but these have their limitations when it comes to quickly searching and finding archived data. You can, of course, search for information inside a PDF. If the PDF has OCR text included, you can see more of the native data.

If a folder is fairly static, another option is to create a Catalog of all the files in the folder or folders of your choice. Acrobat examines all the files and creates a complete index file of all the words. This makes searches extremely fast.

Catalog is only available in Acrobat Professional. In previous versions, Catalog was found under menu item Advanced. In Acrobat 8, Catalog has moved to **Advanced, Document Processing, Full Text Indexing with Catalog**, so you have to look carefully for it. To create a Catalog:

1. From source files such as Word, Excel, Project and so forth create PDF files of each. The PDF file represents a document as of a moment in time. The source file may be archived along with the PDF, as it is a working file and may be useful in the future. The PDF may be created by using PDFMaker, PDF Printer, or scanning a source document directly to a PDF file.

2. Place all the files from the project you are archiving into a common folder. This the folder you will select in the New Index Definition Screen at the time the Index is generated.
3. Create an Index of all the PDF files **Advanced, Document Processing, Full Text Indexing with Catalog**. Be sure to store the Index folder and Index file created from this process in the root project folder. Be sure to exclude folders you do not want included as shown above. Also make sure that all files to be included have a PDF of the source document in the folders you select.

After-the-Fact OCR

While most of the time the default setting for accountants is to automatically OCR all documents being scanned. If a document is not going to be searched, there may not be a reason to OCR it and the resulting files will be much smaller. If the intent is long term storage, you could be creating and managing large PDF files for an extended period of time containing functionality you do not need. You always have the option to OCR a PDF file after it has been created. Consequently, if you do not want OCR more than you want it, we recommend turning the option off because documents will scan much faster, create smaller files, and be faster to load and transfer.

To OCR a document or a single page within a PDF, select **Document, OCR Text Recognition, Recognize Text Using OCR** from the dropdown menu and follow the options window.

Adding Links to a PDF

Adding links makes our PDF much more dynamic. Let's say we are sending someone a report, and we want to add a link to an object or text to a web site or other documents so that when the reader clicks on the link, it will open the browser and take her/him to the link. The link is not a part of the original source document but is included only as a part of the PDF file.

To add a link to a PDF, you select the **Link** tool from **Tools** dropdown menu or from the **Advanced Editing** toolbar. Then, draw a rectangle on your document where you want the link to be. The rectangle can be visible or invisible as the instructor will demonstrate. In our example, we are going to draw a rectangle around an object so the entire picture appears to be linked. When the object is selected, the link will be executed.

Adding Buttons for Multimedia

If you have an object or text with which you want to link, that works great. On the other hand, what if you wanted to use a nice button as your link? First, create a button you like either by finding an icon image, or by using Paint Brush or another graphics tool to create a unique button. Buttons are unique in that you can put text or a picture on a button. A button might thus be used for navigation. If you have detailed text the reviewer could skip, use a button to jump to the summary statement. You could create a button on your document to quickly print to the reviewer's default printer. To create a button, you will need your Forms toolbar (Acrobat 8 Professional.)

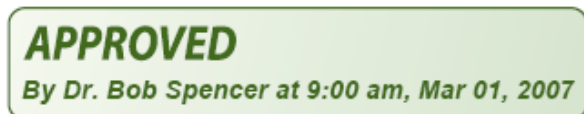
How to Create Custom Dynamic Stamps (tickmarks)

Stamps are objects, like comments, that you place on an object. Acrobat comes with a number of predefined stamps, which we will demonstrate, but the application also allows you to create custom

stamps as well. Stamps may be stored by type or category. You can view all the available stamps from the Stamp Palette by using the **Show Stamps Palette** option on the **Stamp** tool.

Plain Stamps vs. Dynamic Stamps

Plain Stamps contain static information such as Approved, or For Comment, while Dynamic stamps contain information which changes based on when and how it is used. There are several Dynamic Stamps included with Acrobat, but you can create your own. For a Dynamic Stamp, your user name is what Acrobat knows you by and can be changed from **Edit Preferences, Identity**.



To create your own Dynamic Stamp you must have some knowledge of JavaScript and Acrobat Professional, you can create your own custom Dynamic Stamps. To create a stamp you must have some type of editing tool. Generally any software may be used as long as you can create a PDF of the stamp you want to create. This may be done from within the software or by printing the image to a PDF using a PDF Printer application.

The following directions can be used to create plain stamps as well as dynamic stamps.

1. Open the application you plan to use to create the stamp. Any application may be used to create the stamp as long as the image can be saved as a PDF file. For our example we will use Microsoft Word.
2. Next we opened the PDF created in step 1 in Adobe Acrobat and selected **Tools, Comment & Markup, Stamps, Create Custom Stamp...** For the first example we will create a plain stamp with no dynamic information.
3. To create the custom plain stamp select Create Custom Stamp and then browse to the PDF file on disk containing your stamp, it will open in the Sample window and you can make sure this is the stamp you wanted.
4. Next you are presented with the Create Custom Stamp window. If you need to change the stamp sample at the last minute, Select Image for Custom Stamp... and repeat selection process. Select the category this stamp is to be applied to, or create a new category as we have here. Then give your stamp a name so it is easy to remember.

Creating a Dynamic stamp is a little trickier. You could use JavaScript to create dynamic stamps but since many of our seminar attendees do not code in JavaScript, we decided to make the example a little simpler to follow. Adobe stores custom stamps on one of several places depending on what version of Acrobat and Operating system you are using. Generally, once you have created a custom stamp you should be able to find the PDF by searching for the folder as

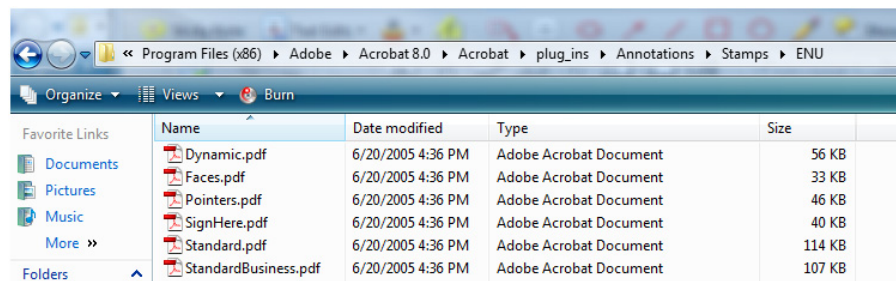
...Adobe\Acrobat\8.0\Stamps*.*

The plain and dynamic stamps which ship with Acrobat are stored in one of several possible folders, again depending on version of Acrobat and the operating system you are running, but can generally be found in the Acrobat\plug-ins\Annotations\Stamps folder. For a more detail explanation and directions to these files visit http://www.acrobatusers.com/tutorials/2007/custom_dynamic_stamp/.

1. The first step was to create a new Approved By stamp in Microsoft Word. Again, we are keeping this simple so I created a text box on a blank page, typed Approved by and used style settings to make it a heading one and placed a black border around the box.
2. Open Acrobat and click on your stamp to use and select Create Custom Tool, Browse to the Word document by changing the file type to Microsoft Word and select your file you created the stamp in. Follow the prompts as we did above and save the new dynamic stamp to be. Acrobat will now save your custom stamp in a very peculiarly name file as shown below.
3. Open this file. Stamp files include a blank page as the first page, followed by a page for each custom stamp. Page down to your selected custom stamp. Don't panic if it looks really large, it will be fine when we are finished. It is important to make the custom stamp large enough to hold the dynamic information we are about to add.

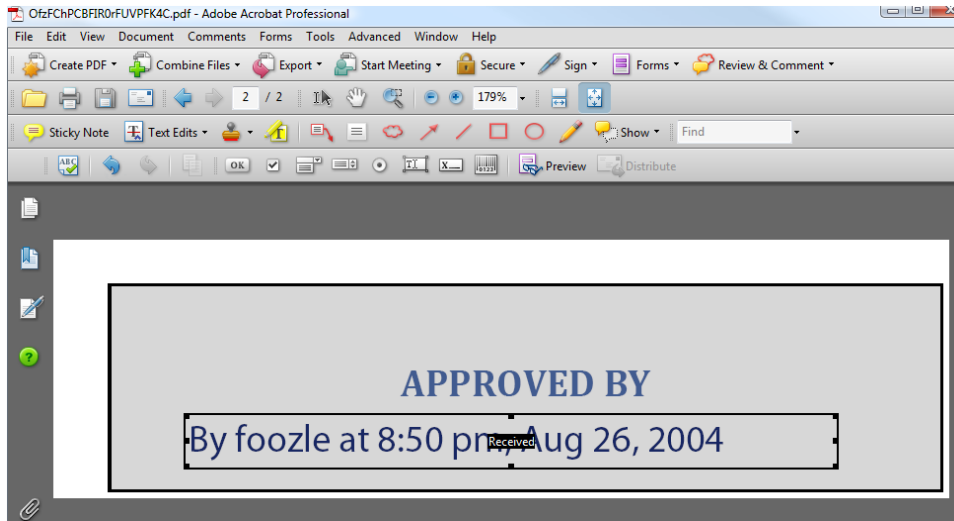
Now we get to the tricky part, without making it too tricky. You could learn JavaScript and create a dynamic stamp, but it is easier to simply copy dynamic information from one of the stamps that are shipped with Acrobat. Open your explorer and browse to the folder holding the default stamps that ship with Acrobat. On this computer, the path is

C:\Program Files (x86)\Adobe\Acrobat 8.0\Acrobat\plug_ins\ Annotations\ Stamps\ENU.



Acrobat Default Stamp Folder

1. Open the Dynamic.pdf and select one of the stamp pages which has the dynamic stamp information you want, open the forms tool and select edit and click on that stamp and copy the dynamic information to the clipboard, click back to your custom dynamic stamp and paste the dynamic data onto your stamp. Don't forget to work with the dynamic data you must have your forms tool in edit mode. Your stamp will now look as follows:



Paste Dynamic Text from Acrobat Dynamic Stamp

Save and close your custom stamp PDF file and open up any other PDF to test your new stamp.

Creating Simple Office Forms Using the Forms Toolbar

The Forms toolbar, more so than other toolbars, works in conjunction with the Forms dropdown menu. To begin creating an interactive form, open a form PDF. This PDF could have been created from a template file, an existing Microsoft Word or Excel document, or a scanned form. Creating an interactive form from a scanned image is not a recommended approach because you must insure a very high quality scan. If you scan a form, review it on the screen and print the document to make sure that the image is not grainy and is easy to read and with which to work.

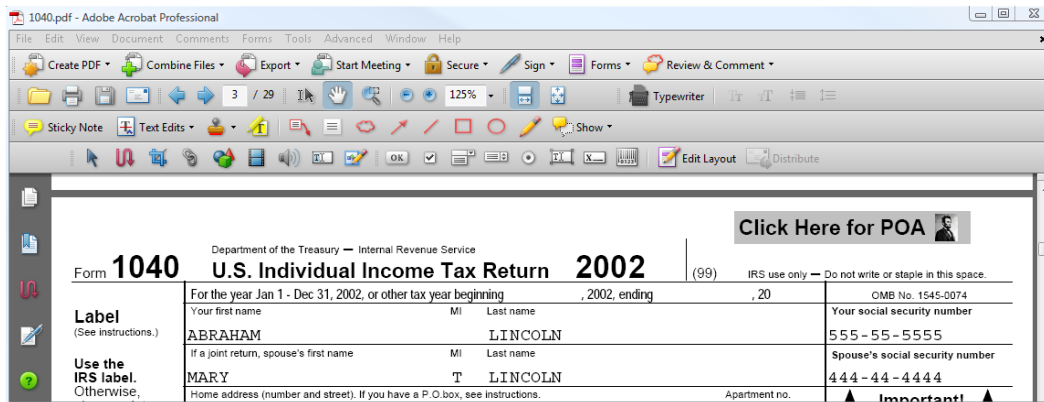


Forms Toolbar

With the Forms tool bar displayed and the Edit Layout icon visible, you are ready to begin. If the Preview icon is displayed, click it to go into **Edit Layout** mode. In Edit Layout mode, you will be able to see any fields that exist. Since this is a new form, you should not see any. From left to right, the toolbar icons are used as follows.

Button Tool

The Button Tool is used to create a button. The button may be an image or text around which you draw a rectangle. The Button tool executes specific actions such as Reset Form, Submit a Form, and others. In the example below we have added a button to the 1040 page of the document that links directly to the client's Power of Attorney. Notice the button has both instructional text as well as an image (icon) taken from the clients file.



Adding Buttons to Documents

Check Box Tool

The Check Box Tool is used to select one or more options on a form. A Check box may be selected, or not. Multiple checkboxes may be selected, if appropriate for your form, or you may limit selected to a single box.

Radio Button

The Radio Button is different than checkboxes because radio buttons are most often used when only one of a group of items is selected.

List and Combo Boxes

We group these together because they tend to work the same way, the matter of choice depending on you. The Combo box contains a list of items; only one may be selected in the area displayed. The List Box displays all or most of the list items from which you make a selection.

Text and Signature Boxes

The Text Box has a T in it; it is used for any box into which you wish either text or numeric data entered. The Signature Box has the X in it; it places a box on the form where a digital signature may be placed.

Using Form Field Recognition to Create Simple Forms

New to Acrobat 8 Professional is **Forms, Form Field Recognition**. The Form Field Recognition tool reviews a document and attempts to identify field information to determine the appropriate place and size of field you need. Fields are given the same name as the related text Acrobat identified during the OCR process.

Form Field Recognition is a great place to start if you have a preexisting form. Make sure the electronic or scanned document is of high quality. Scanned images of paper documents in poor condition may produce fields that are not recognizable by Acrobat. The best document images are PDF files created from native format such as a word processing or spreadsheet file. If you are just beginning to create electronic forms, you might begin with preexisting templates. Microsoft Word and Excel, QuickBooks, and most accounting applications ship with a number of templates which you can save as PDF and use these to create interactive forms. The Form Field Recognition tool does not

accurately recognize all fields. Also, fields are usually defined as Text fields and you must complete the correct properties for each field.

How to Electronically Sign a Document

There may be times when you would like someone else to sign an electronic document and return it to you. To place a blank signature block on a document;

1. Right click in the toolbar area and select the Forms toolbar if it is not already active. Only Acrobat Professional has the forms option. Select the icon for signature, a box with an “X” and underline in it. Complete the Digital Signature Properties box and click on close.
2. This will generate a Sign Here icon and the document is ready to be saved and published. You may have to assist the recipient on creating a signature the first time and as noted above, seek appropriate counsel as to any limits of legal application of this signature. If you are sending the document to an Adobe Reader 8 user, it must be Enable Usage Rights In Adobe Reader... set.

For more information on PDF technologies and all things Paperless, please visit the K2 Enterprises website on these topics: www.totallypaperless.com