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About the Author

Greg Harvey, the author of more than 50 computer books, has had a long career of teaching business people in the use of IBM PC, Windows, and Macintosh software application programs. From 1983 to 1988, he conducted hands-on computer software training for corporate business users with a variety of training companies (including his own, PC Teach). From 1988 to 1992, he taught university classes in Lotus 1-2-3 and Introduction to Database Management Technology (using dBASE) in the Department of Information Systems at Golden State University in San Francisco.

In mid-1993, Greg started a new multimedia publishing venture called mind over media. As a multimedia developer, he hopes to enliven his future computer books by making them into true interactive learning experiences that will vastly enrich and improve the training of users of all skill levels. You can send him e-mail at gharvey@mindovermedia.com and visit his Web site at www.mindovermedia.com.

In 1999, Greg began graduate school at the California Institute of Integral Studies (CIIS) in San Francisco. In the summer of 2000, he received his master's degree in philosophy and religion in the area of Asian and Comparative Studies. Currently, he has finished all his coursework in the Ph.D. program at CIIS and is getting ready to begin work on his dissertation in the area of Chinese and Tibetan end-of-life religious beliefs.

Dedication

To Chris for his unflagging support and encouragement

Author's Acknowledgments

Let me take this opportunity to thank all the people, both at Wiley Publishing, Inc., and at Mind over Media, Inc., whose dedication and talent combined to get this book out and into your hands in such great shape.

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At Mind over Media, I want to give a special thanks to Michael Bryant, the person primarily responsible for the updating and reorganizing all the material for this 6.0 version of the software covered in this new edition of the book (fantastic job, Michael!).

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We're proud of this book; please send us your comments through our online registration form located at www.dummies.com/register/.

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Introduction

Adobe PDF (Portable Document Format) is just now starting to fulfill its promise as a truly transportable file format that enables people to share sophisticated electronic documents across a wide array of otherwise incompatible computer platforms without requiring access to either the software that generated the documents or the fonts used in the documents. Part of the proof of this statement is evidenced in the ever-growing presence of PDF documents, especially on the World Wide Web.

Nowadays, you can hardly browse the Web without encountering sites that present some of their online information as PDF files. In fact, so many sites offer their standard reports, registration and feedback forms, and industry white papers as downloadable PDF files that few seasoned business users remain unfamiliar with the PDF format (even if they're not exactly sure what it is) or the free Adobe Reader software used to open, read, and print documents saved in it.

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this book's information emphasizes more the purpose you ultimately have in mind for the PDF file than the features used to accomplish this purpose in the various programs such as Acrobat, Adobe Reader, and the Acrobat eBook Reader.

As a result, this book is not meant to be read from cover to cover. Each discussion of a topic briefly addresses the question of how a particular feature enables you to accomplish your purpose before launching into how to use it. In Acrobat, as with most other sophisticated programs, there is usually more than one way to do a task. For the sake of your sanity, I have purposely limited the choices, usually by giving you only the most efficient ways to do a particular task. Later on, if you're so tempted, you can experiment with alternative ways of doing a task. For now, just concentrate on performing the task as described.

As much as possible, I've tried to make it unnecessary for you to remember anything covered in another section of the book. From time to time, however, you come across a cross-reference to another section or chapter in the book. For the most part, such cross-references are meant to help you get more complete information on a subject, should you have the time and interest. If you have neither, no problem; just ignore the cross-references as if they never existed.

How to Use This Book

As a reference to all things PDF, you should start out by looking up the topic you need information on (either in the Table of Contents or the Index) and then refer directly to the section of interest. Most topics are explained conversationally. Many times, however, my regiment-commander mentality takes over, and I list the steps you need to take to accomplish a particular task in a particular section.

What You Can Safely Ignore

When you come across a section that contains the steps you take to get something done, you can safely ignore all text accompanying the steps (the text that isn't in bold) if you have neither the time nor the inclination to wade through more material.

Whenever possible, I have also tried to separate background or footnote-type information from the essential facts by exiling this kind of junk to a sidebar. These sections are often flagged with icons that let you know what type of information you will encounter there. You can easily disregard text marked this way. (I discuss the icons used in this book a little later.)

Foolish Assumptions

I'm going to make only two assumptions about you (let's see how close I get): You have a need to create and use PDF files in your work, and you have access to Acrobat 6. Some of you are working on PCs running some version of Windows or Windows NT. Others of you are working on Macintosh computers running one of the later versions of the Mac operating system. Note that there are rather specific system requirements for Acrobat 6 whether you use a Windows or Macintosh computer. These requirements are covered in Chapter 1.

Beyond that, it's anyone's guess what brings you to Acrobat and PDF. Some of you need to know how to convert all your paper documents into PDF files. Some of you need to know how to save your graphics files as PDFs. Others of you need to know how to create PDF form files in which users can submit important data. Still others of you need to know how to create and publish PDF files as eBooks for sale and distribution on the World Wide Web. Regardless of your needs, you will be able to find the information you require somewhere in the pages of this book.

How This Book Is Organized

This book is organized into five parts, the first four of which cover all the basics of reading, making, and managing PDF files. The fifth part, the indispensable Part of Tens, recaps important Acrobat and PDF enhancements and resources. You should not, however, get too hung up about following along with the structure of the book; ultimately, it doesn't matter at all if you find out how to use Paper Capture to convert printed documents to PDF before you find out how to use PDFMaker 6.0 to convert your Word documents, or if you figure out how to archive your PDF documents in a searchable collection before you discover how to create interactive forms for collecting data online. The important thing is that you find the information — and understand it when you find it — when you need to do what needs getting done.

In case you're interested, here's a synopsis of what you find in each part of this book.

Part I: Presenting Acrobat and PDF Files

Part I looks at what makes PDF files tick and the most common ways of accessing their information. Chapter 1 covers the many purposes of PDF documents in today's business world. Chapter 2 lays out essential information about using the different Adobe programs that enable you to read and

print PDF documents. Chapter 3 acquaints you with the interface of Acrobat 6, Adobe's utility for preparing and editing PDF documents.

Part II: The Wealth of Ways for Creating PDF Files

Part II looks at the many ways of making PDF files. Chapter 4 gives you vital information on how to use and customize the Acrobat Distiller to create the PDF document suited to just the purpose you have in mind. Chapter 5 covers the ins and outs of converting Microsoft Office documents (specifically those created with Word, Excel, and PowerPoint) to PDF. Chapter 6 covers capturing paper documents as PDF files primarily by scanning them directly into Acrobat 6. Chapter 7 tells you how to capture Web pages as PDF files. Chapter 8 covers the printing of all or part of your PDF files on printers you have in-house.

Part III: Reviewing, Editing, and Securing PDFs

Part III covers a mixture of techniques for reviewing, editing, and protecting your PDF files. Chapter 9 introduces you to the many ways for annotating the PDF documents that you send out for online review and introduces the new e-mail-based and browser-based review features in Acrobat 6. Chapter 10 covers editing PDF files in Acrobat 6. Chapter 11 tells you how to secure your PDF documents and protect them from further changes. Chapter 12 acquaints you with the different ways you can extract contents in your PDF files for repurposing with the other software programs you use. Chapter 13 gives you the ins and outs of cataloging your PDF files by creating searchable collections that you can distribute across networks or on CD-ROM.

Part IV: PDFs as Electronic Documents

Part IV covers the different roles of electronic PDF files. Chapter 14 covers the creation and usage of PDF documents as interactive forms that you can fill out and whose data you can extract. Chapter 15 acquaints you with creating and preparing PDF files as eBooks for sale and distribution on the World Wide Web. Chapter 16 gives you information on how you can turn PDF documents into online presentations by adding multimedia elements, including audio and video clips.

Part V: The Part of Tens

As is the tradition in these *For Dummies* books, the last part contains lists of the top ten most useful facts, tips, and suggestions. Chapter 17 gives you a list of my top ten third-party (that is, not developed by Adobe Systems) add-in programs for augmenting and enhancing the program's already considerable features. Chapter 18 gives you a list of my top ten online resources for discovering even more about Acrobat and PDF files!

Conventions Used in This Book

The following information gives you the lowdown on how things look in this book — publishers call these the book's *conventions* (no campaigning, flag-waving, name-calling, or finger-pointing is involved, however).

Keyboard and mouse

Although most of the keyboard and mouse instructions given in the text are self-explanatory, there are a few important differences between the typical Windows and Macintosh keyboards and mice that are worth noting here. For example, keystroke shortcuts in Acrobat 6 and Adobe Reader 6 in Windows often use the Ctrl key in combination with one or more letter keys. The Macintosh, however, substitutes its ⌘ key (called the Command key, the one with the apple and the cloverleaf icon) for the Windows Ctrl key (rather than using its Control key). Also, because the Macintosh keyboard has no Alt key, its Option key is routinely substituted in all shortcuts using the Alt key.

Regarding the mouse, Windows favors a two-button (left- and right-button) mouse, whereas Macintosh favors a single-button mouse. As a result, while you access shortcut (or context) menus in Acrobat in Windows by clicking the right mouse button (a technique commonly known as right-clicking), you hold down the Control (not the ⌘) key as you click the mouse on the Macintosh (a technique commonly known as Control+clicking). Note that if you do have a two button mouse on the Macintosh, the right-clicking technique applies.

Other than these common keyboard and mice anomalies, it's pretty much the same whether you are working with PDFs in Acrobat and Adobe Reader on a Windows or Macintosh machine. In the few cases where there are differences in Acrobat's capabilities across the platforms, I have duly noted them in the text, usually in the form of a tip or warning (described in the next section).

Special icons

The following icons are strategically placed in the margins to point out stuff you may or may not want to read.



This icon alerts you to nerdy discussions that you may well want to skip (or read when no one else is around).



This icon alerts you to shortcuts or other valuable hints related to the topic at hand.



This icon alerts you to information to keep in mind if you want to meet with a modicum of success.



This icon alerts you to information to keep in mind if you want to avert complete disaster.

Where to Go from Here

If you've never had any prior experience with PDF files, I suggest that, right after getting your chuckles with the cartoons, you go first to Chapter 1 and find out what you're dealing with. If you're already familiar with the ins and outs of PDF files, but don't know anything about how you go about creating them, jump to Chapter 4, where you find out how to get started using Acrobat's Create PDF features and using the Acrobat Distiller. Then, as specific needs arise (like "How do I annotate PDF documents in Acrobat 6?" or "How do I protect PDF files from further changes?"), you can go to the Table of Contents or the Index to find the appropriate section and go right to that section for answers.

Part I

Presenting Acrobat and PDF Files

The 5th Wave

By Rich Tennant



"...and I'd also like to thank Doug Gretzel here for all his work in helping us develop our interactive, multimedia stapling division."

In this part . . .

Adobe's PDF (Portable Document Format) is characterized as a truly universal file format that preserves all the original document's formatting — including its fonts, graphics, and layout — across a wide array of different computer platforms. This part of the book is where you find out how PDF came to warrant this lofty characterization.

In Chapter 1, you discover the many platforms that support documents saved as PDFs, the many uses for PDF documents in your work, the different classes of PDF files that you will be dealing with, along with a general overview of the process you follow in saving documents as PDF files. In Chapter 2, you get the lowdown on how to use the various PDF reader software programs offered by Adobe Systems, including Acrobat 6, Adobe Reader, and Acrobat eBook Reader. Chapter 3 rounds out Part I by introducing you to the interface of Acrobat 6, the Adobe program that not only enables you to view and print PDF files but edit them as well.

Chapter 1

The Ins and Outs of PDF Files

In This Chapter

- ▶ What is a PDF file?
 - ▶ The benefits of using PDF files
 - ▶ Where PDF files come from
 - ▶ The different flavors of PDF files
-

I'm so enthusiastic about Adobe PDF files that I think the abbreviation PDF should stand for Pretty Darn Fantastic instead of the more mundane Portable Document Format. In PDF files, you not only see the first inklings of a truly paperless office (or as close as we're likely to get), but also the delivery of a truly universal file format; that is, one truly capable of being opened and used on any of the many computer operating systems currently in use.

In this chapter, you get introduced to what makes PDF files so special and how they can be used to your advantage, especially in office environments that mix and match different computer platforms. As part of this process, you also get acquainted with the different versions of PDF files and how they can be tailored to fit the particular needs of those who use the documents.

The Purpose of PDF Files

PDF, as the name Portable Document Format implies, was developed by Adobe Systems as a means for digital file exchange. The main idea behind the file format is to enable all computer users to be able to open, review, and print the documents saved in it. This means that users who work on computers that don't have the software with which the files were originally created can still see the document as it was originally designed and laid out, including all its fonts and graphics.

The key to this digital file interchange is the nifty little software program known as Acrobat (although Adobe originally named it Carousel when it first appeared in 1993). A free form of this software, known as the *Adobe Reader*, is available from Adobe Systems for all the major personal computing devices and most versions of all the operating systems known to humankind. As of this writing, these forms include:

- ✓ Microsoft Windows machines with the following versions: Windows 3.1, Windows 95 (OSR 2.0), Windows 98 SE, Windows Millennium Edition, Windows NT 4.0 (with Service Pack 5), Windows 2000, or Windows XP
- ✓ Macintosh computers with version 7.5.3, 8.1–8.6, 9.1–9.2, or OS X of the Macintosh operating system
- ✓ Palm handhelds with OS 3.0 or later
- ✓ Pocket PC computers with Windows CE or Windows 2002
- ✓ IBM AIX workstations with IBM AIX 4.2.1
- ✓ HP 9000 Series workstations (model 700 or higher) with HP-UX 9.0.3
- ✓ SGI workstations with Silicon Graphics IRIX 5.3
- ✓ DEC workstations with DEC OSF/1, version 4
- ✓ Sun Solaris SPARCStations with Sun OpenWindows 3.0 or later, Motif 1.2.3 or later, OpenLook 3.0, or CDE 1.0 or later
- ✓ Computers running versions of Linux including Red Hat Linux 5.1 or Slackware Linux 2.0



Acrobat 6 and Adobe Reader are both major upgrades to the Acrobat software family. Consequently, backward-compatibility with older operating systems is limited. In order to run Acrobat 6 on Windows you must use one of the following operating systems: Microsoft Windows 98 Second Edition, Windows NT Workstation 4.0 with Service Pack 6, Windows 2000 Professional with Service Pack 2, Windows XP Professional or Home Edition, or Windows XP Tablet PC Edition. Macintosh users must use OS X versions 10.2.2–10.2.6.

All you have to do to get the appropriate version of Adobe Reader for your current operating system is point your Web browser to the following page on the Adobe Systems Web site at

www.adobe.com/products/acrobat/readstep2.html

and in the Step 1 of 2 area of the Adobe Reader download page choose your language, your connection speed (dial-up or broadband), and your computer platform. After you choose your computer platform, the Step 2 of 2 area appears. Note that the selections you make in Step 1 determine the version of

Adobe Reader best suited for your computer system. If your current system is compatible with Adobe Reader, you are offered two choices: either the Basic or Full versions if you chose dial-up as your connection speed, or Full if you chose broadband. The Basic version is 8.7MB and can typically take up to 30 minutes or more to download with a 56K modem. The Full version of Adobe Reader has enhanced features that are described in the Step 2 of 2 dialog box and weighs in at a hefty 15.3MB — not a big deal if you have broadband Internet access but worth the consideration if you use a modem to connect to the Web. After choosing your desired version of Adobe Reader, click the Download button. After downloading the Adobe Reader to the desktop of your computer platform, double-click the icon representing the compressed version of the program to unpack and install it on your computer.

After you install the Adobe Reader on your computer, you can then open, review, and print any PDF file that you get, regardless of what application programs were used in generating its text and graphics, and regardless of the computer platform on which these programs ran. (See Chapter 2 for details on how to access and review PDF files with the Adobe Reader.)



Adobe Reader comes in two versions with very different feature sets that you can compare during the process of downloading the program. Adobe also created not two, but three different versions of Acrobat 6: Professional, Standard, and Elements. In order to compare the different features of these products, Adobe provides an Acrobat family features matrix page on their Web site. Go to the following page on Adobe's Web site to view this important information:

www.adobe.com/products/acrobat/matrix.html

Benefits of Using PDF Files

The most important benefit derived from the use of PDF files is that anyone whose computer is equipped with Adobe Reader can open, read, and print them. This essentially enables you to concentrate on the software tools that you have at hand and feel are best suited for producing the document without having to worry about whether or not your client or coworker has the same software available to them. As you'll soon see, this is only one of the many important uses to which you can put your PDF files with Acrobat 6. Keep in mind that the availability of many features described in the following sections depend on which version of Adobe Reader or Acrobat 6 you are using. For that reason, it's a good idea to go to the Acrobat family features page described in the previous section to familiarize yourself with all of Adobe's new Acrobat products.

What you designed is what they see

Because you are assured that your PDF files will essentially appear on-screen and print as you originally designed them, no matter the computer on which they're opened or the printing device to which they're output, you don't have to hold back on your design, avoiding the use of certain more decorative fonts and/or complex layouts. Figures 1-1 and 1-2 illustrate this situation. In Figure 1-1, you see a PDF file as it appears when opened with Adobe Reader on a computer running Windows. Figure 1-2 shows the same PDF file as it appears when opened on a Macintosh computer. As you can see, they are both comparable in terms of the appearance of their fonts and their layout.

PDF files in the review cycle

While PDF debuted as a universal file format for viewing and printing documents on various types of computers and printers, thanks to advances to the Acrobat software (and here I'm referring to the full-fledged Acrobat program that you must pay for rather than the freebie Adobe Reader available for download), you can now make PDF files an integral part of your design review process. After converting a document to PDF, you can disseminate copies of it to each of the people from whom you need feedback or approval before you put it into use. Each of these people can then add their feedback by adding comments or actually marking up the PDF document in Acrobat 6.

You can then collect their feedback and make the necessary changes either to the PDF version of the file in Acrobat 6 or to the original document (prior to PDF conversion) in the program used in its creation. If managers, coworkers, or clients are required to sign off on the document (either in its original or revised form), they can indicate their approval by stamping the document with their approval or by digitally signing off on it, as shown in Figure 1-3. (See Chapter 9 for details on how to use PDF files in a review cycle and Chapter 11 for details on how to use digital signatures.)

Providing forms, both paper and electronic

With the widespread reliance on the World Wide Web for getting and submitting crucial information, PDF files have taken on another important use, that of providing forms to fill in both online and after printing. Acrobat 6 makes form creation about as easy as it can be.

Figure 1-1:
A PDF document as it appears in the Adobe Reader 6 on a computer running Windows.

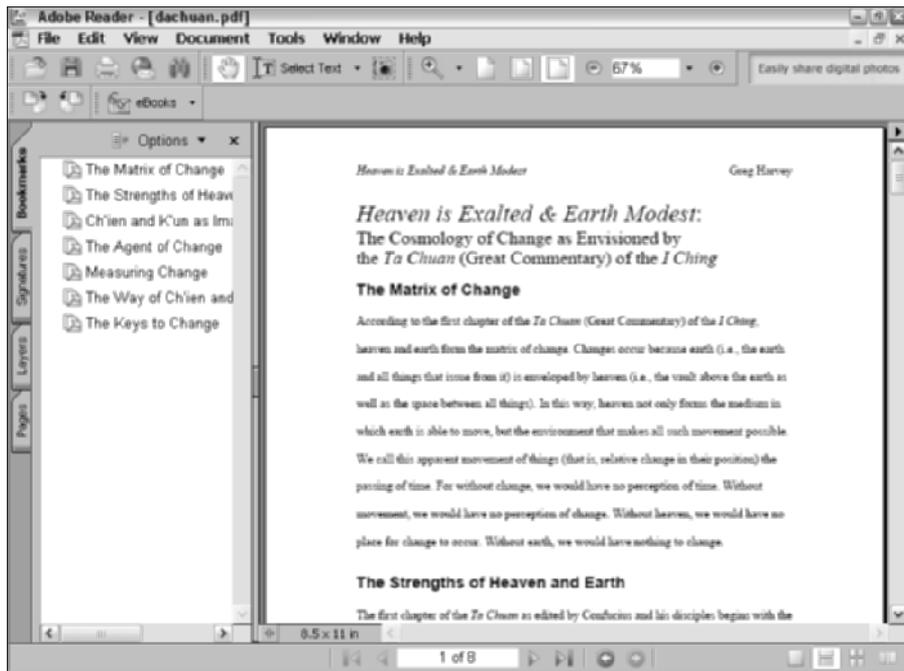
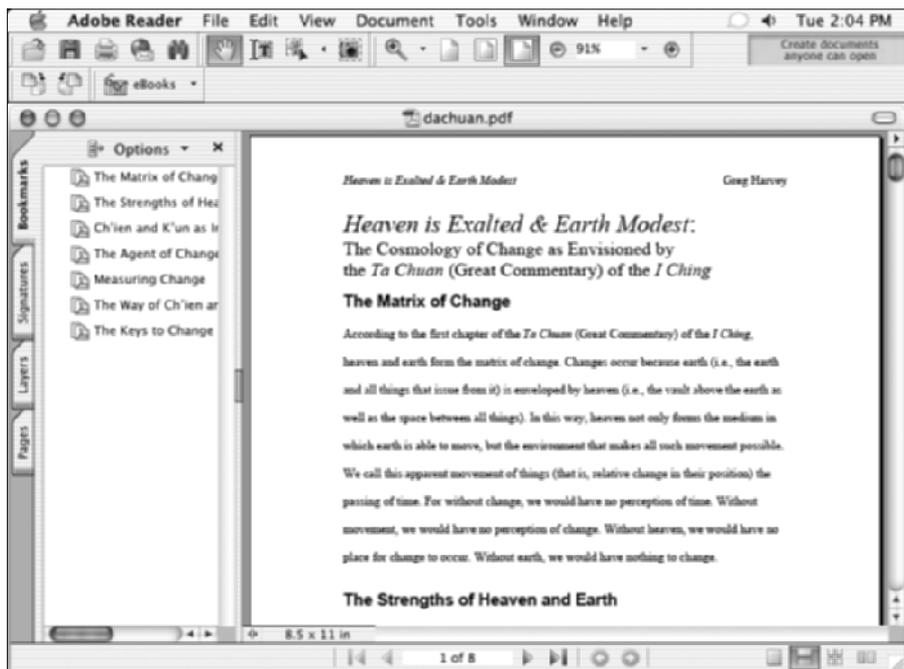


Figure 1-2:
The same PDF document as it appears in the Adobe Reader 6 on a Mac computer.



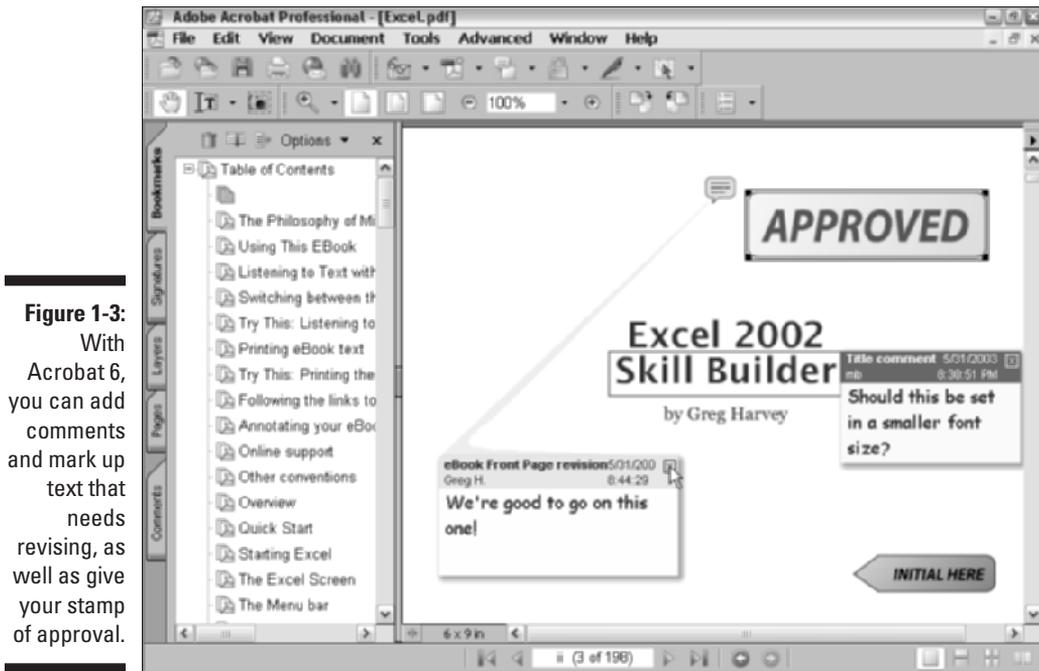
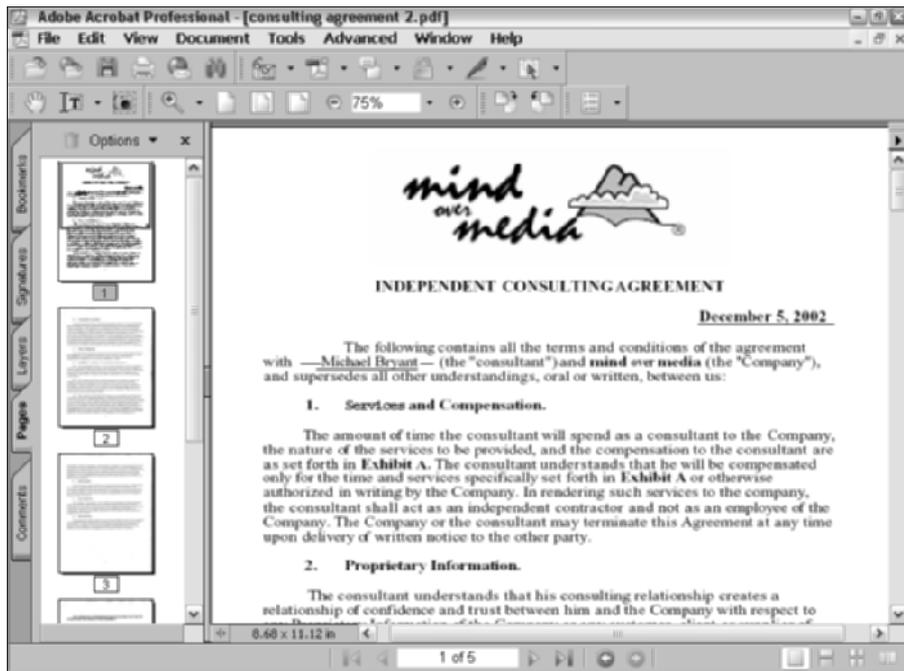


Figure 1-3: With Acrobat 6, you can add comments and mark up text that needs revising, as well as give your stamp of approval.

If you need to make certain paper forms available on your company's intranet or your public Web site so that users can download, print, and then fill them in by hand, you can use Acrobat 6 to scan the paper forms and immediately convert their digital images into PDF files (see Figure 1-4). If you need to be able to search and edit the text in the electronic versions of these forms, you can use the Paper Capture feature — Acrobat's version of OCR (Optical Character Recognition) software — to convert the text image into searchable and editable fonts. (See Chapter 6 for details on scanning paper forms and converting them into PDF files with Acrobat 6.)

If you need to get feedback or process informational or order forms directly from your company's intranet or its public Web site, you can use Acrobat 6 to design the electronic forms. Acrobat 6 makes it possible to add all types of interactive fields, including text boxes, combo boxes (also known as drop-down list boxes), check boxes, radio buttons, and command buttons (that users can select to do things such as submit their information or clear the form). With the addition of a simple CGI (Common Gateway Interface) script (courtesy of your friendly IT personnel or Internet service provider), you can store the data submitted by way of your PDF forms in text files that your favorite database or spreadsheet program can read and store. (See Chapter 14 for details on creating interactive PDF forms for use online.)

Figure 1-4: Acrobat 6 makes it easy to scan and convert paper forms to PDFs, which can then be distributed for download from your Web site.



You don't have to use the World Wide Web or a company intranet to be able to fill in electronic PDF forms that you create with Acrobat 6. Users who have Acrobat 4 or later installed on their computers can open and fill in these electronic forms using this version or later of Acrobat.

Document archiving

Let's face it: Paper archives are not just bulky and heavy, but they also degrade quickly and are a veritable nightmare to search. For this reason alone, out of all the possible uses for Adobe's Portable Document Format, archiving your documents as PDF files may prove to be the most important to you. Imagine all your paper contracts, correspondence, company reports, and the like stored as collections on CD-ROMs, from which you can retrieve individual files through searches for keywords or for vital statistics such as author name, client name, or job number.

You can use the Paper Capture feature in Acrobat 6 on the Windows or Macintosh platform to scan and convert such paper documents into searchable PDF files. After you do that, Acrobat makes it easy for you to organize

these files into collections (known officially as catalogs), which you can index for truly speedy retrieval using the Acrobat 6 search feature. (See Chapter 6 for details on converting paper documents to PDF and Chapter 13 for details on cataloging and indexing your files prior to storing them on various media.)



The Paper Capture feature in Acrobat 6 for Windows restricts you to scanning and converting paper documents of no more than 50 pages in length. If you know that you must scan and convert documents longer than 50 pages on the Windows platform, you need to purchase the standalone module, Acrobat Capture 3 for Windows NT, 2000, or XP or Acrobat Capture 2.0 for Windows 95/98.

PDF in the prepress workflow

One of the most obvious uses for PDF files is in the prepress workflow, during which documents that require professional printing are checked for potential printing errors and readied for conversion from electronic images to the film or plates used in the final printing of the document using high-end imagesetters (a process known in the industry as *preflight*). Acrobat 6 (Professional version only) contains a number of prepress-related printing options, along with an overprinting preview and an on-screen color correction feature.

These specialized print options and error-checking features in Acrobat 6 are designed to help professional graphic artists and service bureau personnel in finding and eliminating potentially costly printing problems. Most users not directly involved in this end of the business will have no reason to fool with these printing options or use these specialized preview features. (If, for some unknown reason, you are interested in knowing more about these prepress features, refer to Chapter 8.)



Always check with your service bureau personnel to find out what, if any, prepress options they want you to use prior to sending them your PDF files for preflight. Some houses definitely prefer that you not use *any* of these prepress options, so it's always good to check it out ahead of time.

Quick and easy Web site retrieval

If you are involved with your company's Web design or you are a Web freak who travels frequently and is therefore bereft of a way to stay connected to the Net, you can use the Acrobat 6 Web Capture feature to copy and convert to PDF specific Web pages or even entire Web sites that are of interest to you (see Figure 1-5). After you've converted a set of Web pages or an entire Web site into PDF files, you can then browse them from your hard drive with Acrobat or Adobe Reader without being connected to the Internet.