CHAPTER 1 STARTING WITH ACROBAT DC

INFOCUS

Adobe Acrobat DC has been developed for Adobe's new ***Document Cloud*** platform and integrates desktop and mobile apps and services.

Acrobat DC lets you convert content from many disparate sources into one common file format known as ***PDF*** (***portable document format***). When you convert a file to PDF, the look and content of the original (including fonts and graphics) is preserved. Acrobat DC provides a plethora of tools and features for editing PDF files, creating fillable PDF forms, storing and sharing files online, and electronically sending, tracking and confirming delivery of documents.

Adobe also offers a free program, Adobe Reader DC, to provide universal access to PDF documents..

In this session you will:

✓ gain an understanding of ***Adobe Acrobat DC*** and ***PDFs***

✓ gain an understanding of ***Adobe Document Cloud***

✓ learn how to start ***Acrobat*** in ***Windows 8***

✓ gain an understanding of ***Views***

✓ gain an understanding of the ***Home View***

✓ learn how to open a ***PDF*** document in ***Acrobat***

✓ gain an understanding of the ***Document View***

✓ gain an understanding of the ***Tools View***

✓ learn how to close files and exit ***Acrobat***.

UNDERSTANDING ACROBAT AND PDFS

Acrobat DC lets you create, edit, sign, share and track PDF files. A **PDF file** is a file that has been converted from its original format (such as a Word *docx* document) to **PDF** (**Portable** **Document Format**). One main reason to convert files to PDF is that the PDF looks identical to the original file and anyone with Acrobat Reader can open it but not edit it unless explicitly allowed.

What Is PDF?

PDF, or **Portable Document Format**, is a universal file format that was developed by Adobe Systems for preserving the fonts, formatting, layout, colours and graphics of any source document to enable accurate and secure sharing with others. PDF is the standard for the secure and reliable distribution and exchange of electronic documents and forms worldwide.

As the name implies, PDF files are **portable**. This means that if you create a document on an Apple Mac computer using generic Mac fonts and then convert it to a PDF file, you can view this PDF file, complete with the page layout, graphics and fonts intact, on a Windows computer or even an iOS or Android device.

PDF documents are compact, and can be shared, viewed, navigated and printed exactly as intended by anyone using **Acrobat Reader**. Acrobat Reader is free and available for all platforms: Mac and PC desktops, iOS devices (including iPhones and iPads) and Android devices.

What Is Adobe Acrobat DC?

One of the great frustrations of computing is receiving a document or picture and not being able to view it or print it because you have neither the program that created it nor a program to adequately convert it the file.

Adobe Acrobat was developed to help overcome this issue. It was created to act as a universal recipient, accepting a range of file and graphics formats, regardless of the application or platform in which they were created, for conversion to its **Portable Document Format** (**PDF**).

However, converting documents to PDF is not the only thing that you can do with Acrobat. Using Acrobat DC you can:

- create PDF documents which maintain fidelity to the original document – page layout is preserved, fonts are embedded so the type is perfectly rendered, line breaks and text flow are conserved, and images are rendered identically
- create PDF documents from within Microsoft Office applications and other applications (such as browsers, Notepad, graphics applications and more)
- merge and combine documents, spreadsheets, emails and more into a single PDF document
- edit and enhance PDF documents such as spell checking them, adding or deleting text from lists, changing images, and more
- permanently remove and redact confidential or sensitive data from the PDF content (including metadata) so that the recipients cannot see or access the content
- edit scanned documents using fonts that match the original text
- store and securely share files online using Adobe Document Cloud services
- add copy and editing protection to a PDF or include a password to protect your PDF from unauthorised access
- create fillable forms using the Form Wizard
- convert a scanned paper-based form, a form created in Word, Excel or another application, or an existing PDF form into a fillable PDF form
- insert audio files, video files and interactive objects into PDFs
- send, track, manage and store signed documents
- reverse engineer PDFs to generate Word, Excel and PowerPoint files for easy editing, using fonts that look identical to the original document
- collect e-signatures from others and track responses in real time.

UNDERSTANDING ADOBE DOCUMENT CLOUD

The *Document Cloud* provides a set of tools that let you access PDFs via Acrobat mobile apps or a computer's browser. Central to the Document Cloud is Acrobat DC. However, the functions and services included depend on whether you have the Acrobat Standard DC or Acrobat Pro DC version (and either a perpetual license or subscription), or the free Acrobat Reader DC.

Adobe Document Cloud

Adobe Document Cloud provides a new way to work with PDFs from anywhere – on your computer at home or at work, or on the go with your mobile device. As well as providing online file management and storage for your PDFs, the Document Cloud provides *e-signing* services to everyone. Anyone with Acrobat Reader DC can fill in and sign PDFs, and individuals who have an Acrobat DC subscription can request signatures from others, then track, manage and archive signed documents securely.

Adobe Document Cloud also provides a broad range of online services. Free services include the ability to perform simple document signing with the *Fill & Sign* tool, store and share files online, and access recently viewed files across desktop, web and mobile. Paid services include the ability to create, combine, edit, export and organise PDFs using a browser and/or mobile device. With a subscription users can also quickly create PDFs using a mobile device such as a tablet or smartphone.

Note: You cannot open a file saved to the Document Cloud by selecting **File** > **Open** in Acrobat or via File Explorer. To open it you must either display the *Home* view in Acrobat and access *Document Cloud* under *STORAGE*, or browse to *acrobat.com* and sign in to your account.

Acrobat Reader DC

Acrobat Reader DC is a free PDF viewer available for both Windows and Mac. It lets you view, search, print and annotate virtually any type of PDF file. In addition you can fill out forms and sign PDFs. Because it is connected to Adobe Document Cloud, anyone can work with PDFs on their computer or mobile device when they enable *Mobile Link* (see below).

Acrobat Standard DC

Acrobat Standard DC (Windows only) is ideal for users who need to create, edit and share PDFs. You can convert Microsoft Office documents to PDF and export from PDF to editable Word, Excel and PowerPoint files; edit text and images in a PDF and set up a comment and review cycle; create fillable forms and password protect sensitive documents; and combine multiple documents into a single PDF. With a subscription, you can additionally combine multiple documents through a browser, send documents for signature and track their progress.

Acrobat Pro DC

Acrobat Pro DC (Windows and Mac) is ideal for a wide range of users, including architects, engineers and graphic designers as it includes the ability to convert Project, Visio and AutoCAD files to PDF. As well as all of the features included in the *Standard* version, you can automatically convert scanned images to editable PDFs, add audio and video content and redact sensitive content. With a subscription you can also add the ability to edit PDF files on a tablet, combine documents in a browser, send and track large documents and track and collect signatures. You will also receive automatic updates for bug fixes and new features.

Mobile Apps

There are several free mobile apps available for Android, iOS and Windows Phone devices, including the *Adobe Acrobat DC* mobile app and the *Adobe Fill & Sign DC* mobile app.

The *Acrobat DC* mobile app allows you to view, edit and add comments to PDF files on a mobile device. To enable this functionality you will first need to switch on *Mobile Link*. You will then be able to open recently viewed PDFs on other computers or mobile devices, regardless of where you last viewed them. For example, you can open a PDF on one device, such as your laptop, and then continue working on it elsewhere – your desktop computer, tablet or smartphone. If you have an *Acrobat Pro DC* subscription you can additionally edit PDFs on a tablet.

The *Fill & Sign DC* mobile app allows anyone to fill in, sign and send forms. If you sign documents frequently or fill in a lot of forms, you can do so faster by using reusable text from your personal autofill collection. You can sign forms by typing or drawing your signature or using an image. You can use the *Fill & Sign DC* app by itself or when you are working in the *Acrobat DC* mobile app. Document Cloud subscribers with a Pro-level plan can use the *Fill & Sign DC* mobile app to convert a photo of a form to a fillable PDF form.

STARTING ADOBE ACROBAT IN WINDOWS 8

Before you start to work with Acrobat you will need to know how to open the application. In **Windows 8** this is achieved by accessing the **Windows Start** screen, which will either be displayed by default or accessible from the desktop. You can also choose to pin Acrobat to your desktop taskbar, making it easier to access in the future.
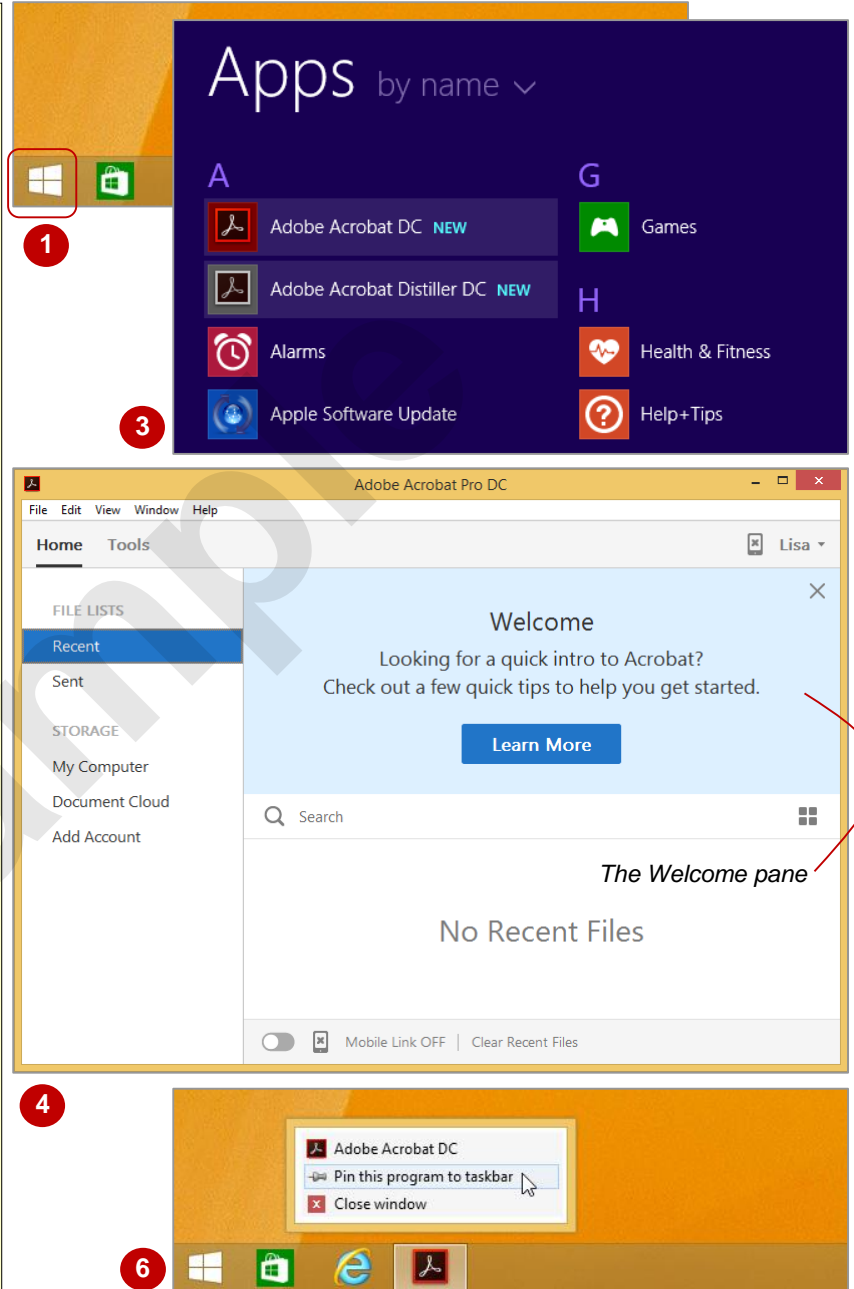
Try This Yourself:

Before you begin, ensure your computer is turned on and the Desktop is displayed…

1 Click on the **Windows** icon in the taskbar at the bottom of the screen to display the **Start** screen

2 Move the mouse pointer to display the white **down arrow** icon in the bottom left corner of the **Start** screen

3 Click on the arrow to display the **Apps** view

4 Locate the Adobe apps, then click on **Adobe Acrobat DC** to open Acrobat – this screen is known as the **Home** view

A Welcome pane may display giving you access to some starting tips…

5 If the Welcome pane is displayed, click on **Close**

6 Right-click on the Acrobat icon in the taskbar to display a menu of options, then select **Pin this program to taskbar**

You can now click on this icon to open Acrobat from the desktop. This icon will remain in the taskbar unless you remove it

The Welcome pane

For Your Reference…

To **start Acrobat**:

1. On the **Windows Start** screen, click on the white **down arrow** icon to display the **Apps** view
2. Click on **Adobe Acrobat DC** to start the application

Handy to Know…

- Instead of locating Acrobat in the **Apps** view, you can navigate to the **Start** screen and begin typing **Acrobat** to display the **Search** pane, then click on the application name when it appears in the list of search results.
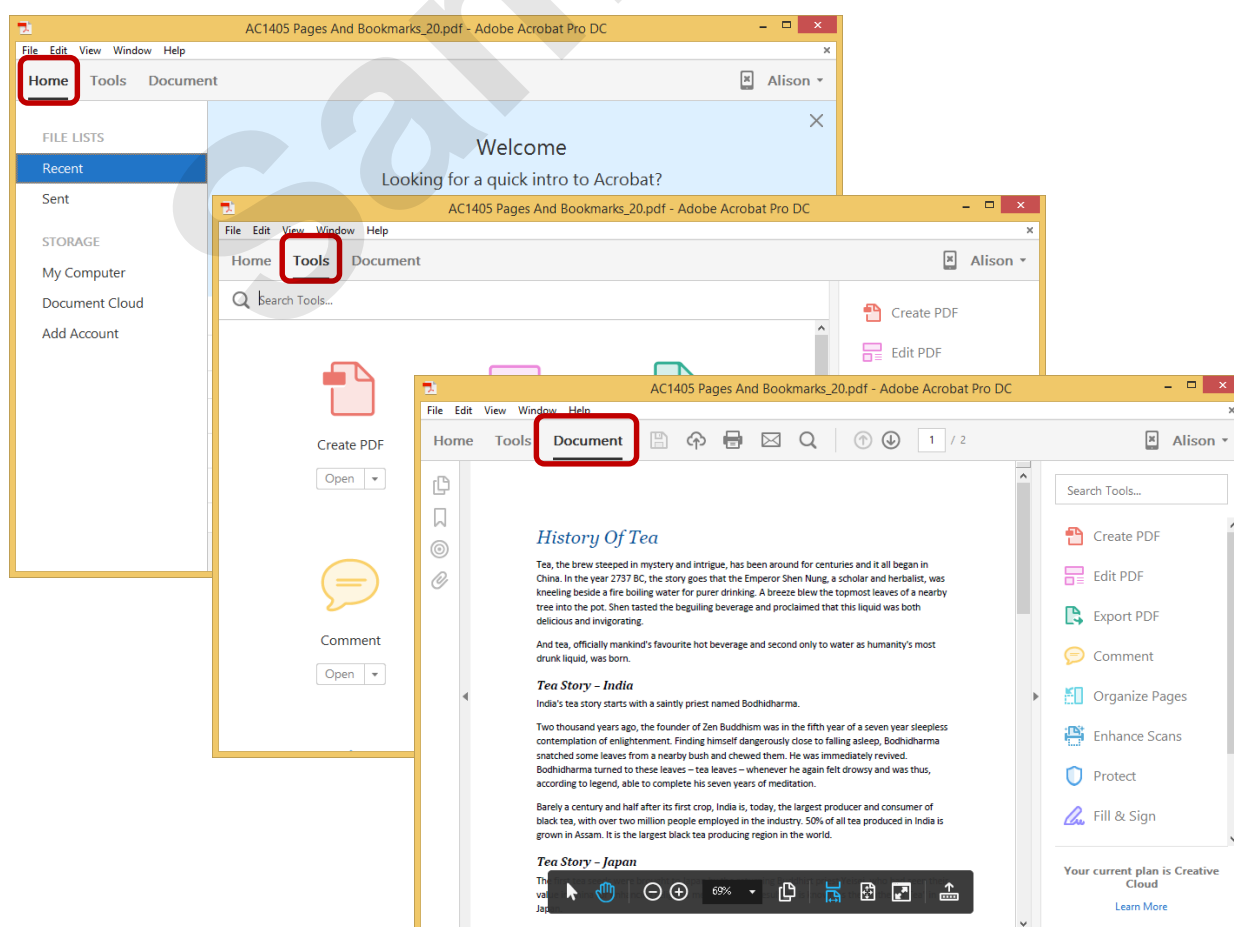

UNDERSTANDING VIEWS

Acrobat has three *views* that each display different commands and options: the *Home* view, the *Tools* view and the *Document* view. While you will probably find that you spend most of your time in *Document* view, the other views are very handy and it is important to have a clear understanding of what they can be used for and how to use them.

Views

Acrobat has three views: *Home*, *Tools* and *Document*. You will mostly likely find that you switch between these views occasionally as you work, as each view provides you with the means to perform different actions. You can access each view by clicking on the appropriate tab at the top of the window.
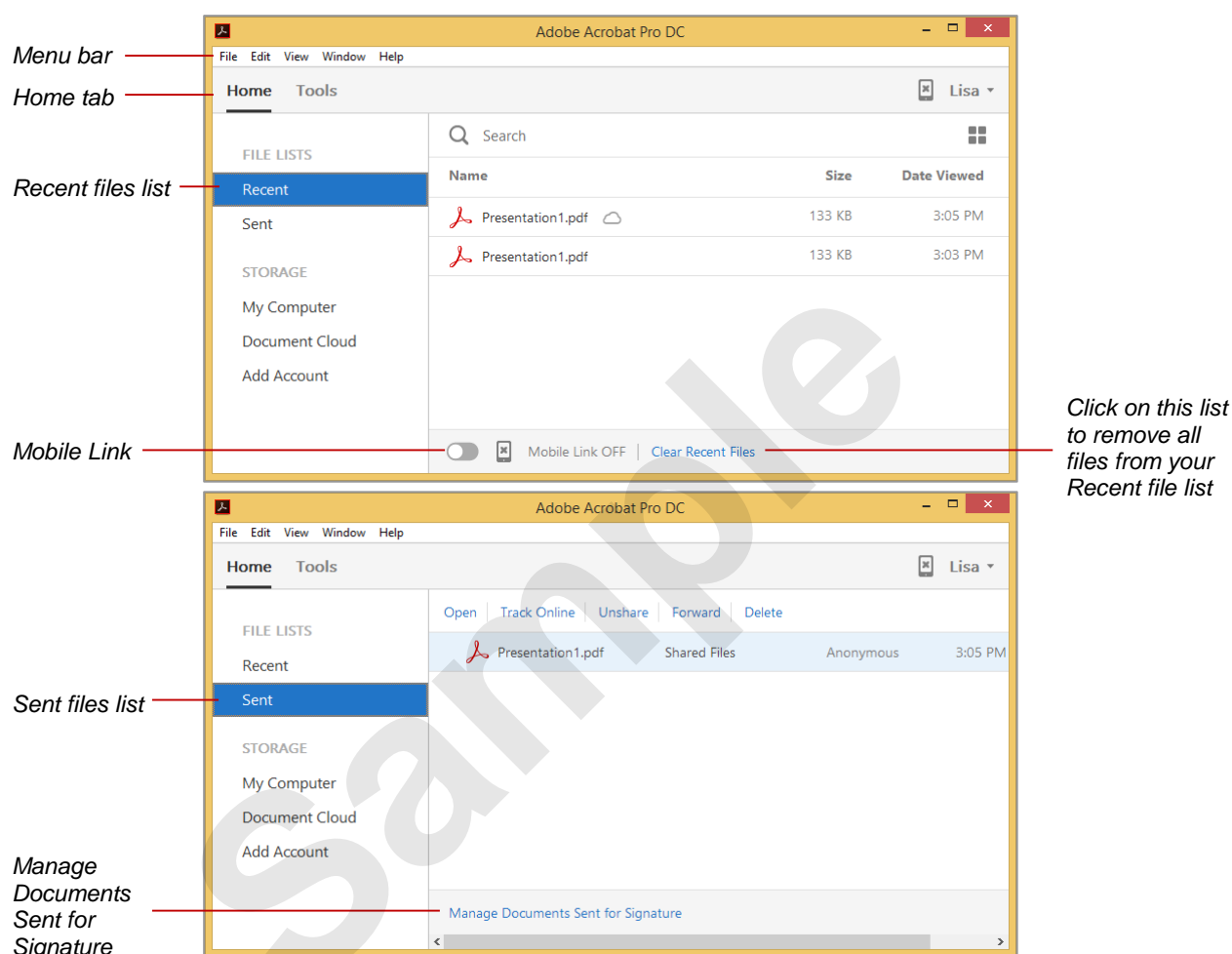
- *Home* view is displayed by default when you open Acrobat (unless you open a file directly from File Explorer). In this view you can see and open any PDFs you have recently viewed in Acrobat or sent to others, as well as view the PDFs you have saved in various locations such as your computer and the Document Cloud.

- *Tools* view is displayed when you click on the *Tools* tab. It provides a range of tools for working with a document, including tools for editing, organising, protecting and printing. If you already have a document open and you click on a tool in *Tools* view, Acrobat will switch to *Document* view and display the toolbar for that tool at the top of the document window. If you click on a tool in *Tools* view and you do not already have a document open you will be prompted to open a file.
Tools view also displays the tools pane down the right side of the window, which lists some of the most commonly used tools.

- *Document* view is the view in which you can see the document that you are working on. The *Document* tab is not displayed at the top of the window until you have opened a file. You can switch from *Document* view to the *Home* or *Tools* view without closing the document. You can access tools in *Document* view from the tools pane on the right side of the window, or switch to *Tools* view to locate tools that are not included in the tools pane.

UNDERSTANDING THE HOME VIEW

The *Home* view is the view that displays by default when you launch Adobe Acrobat DC. It is also the view that displays when no documents are open. The *Home* view includes two file lists – PDFs that you have recently viewed or worked on and PDFs that you have sent – as well as access to your *Storage* options.

Menu bar

Home tab

Recent files list

Mobile Link

Click on this list to remove all files from your Recent file list

Sent files list

Manage Documents Sent for Signature

Menu bar	The *menu bar* provides access to commands for working in Acrobat. It appears by default at the top of all three views.
Home tab	Click on the *Home* tab to switch to *Home* view.
Recent file list	The *Recent* file list displays all of the PDFs that you have opened recently. You can open a file from here by double-clicking on the file name.
	You can automatically synchronise your recently used PDFs across mobile devices allowing you to work on documents using any of your devices. To utilise this feature, you must turn on *Mobile Link* at the bottom of the *Recent* file list, install the *Acrobat DC* mobile app on your phone or tablet, and sign in to your *Document Cloud* account.
Sent file list	The *Sent* file list displays all PDFs that you have sent using *Adobe Send & Track* and *Send for Signature*. From this list you can track and manage your sent files online by clicking on the desired file to display the available options at the top of the right pane. You can also manage your files sent for signature by clicking on the *Manage Document Sent for Signature* link at the bottom of the right pane.
STORAGE location options	The *STORAGE* location options display the various places in which you can store and work on files from within Acrobat. The options include *My Computer* (which lists recently visited locations, or you can browse to another location on your computer), *Document Cloud* (shows all PDFs saved to your online storage) and *Add Account* (to connect to a Microsoft SharePoint account if you have access to one).

OPENING AN EXISTING PDF FILE

The *Home* view in Acrobat provides easy access to existing PDFs. To open a file that you have been working on recently, simply double-click on it in the *Recent* fil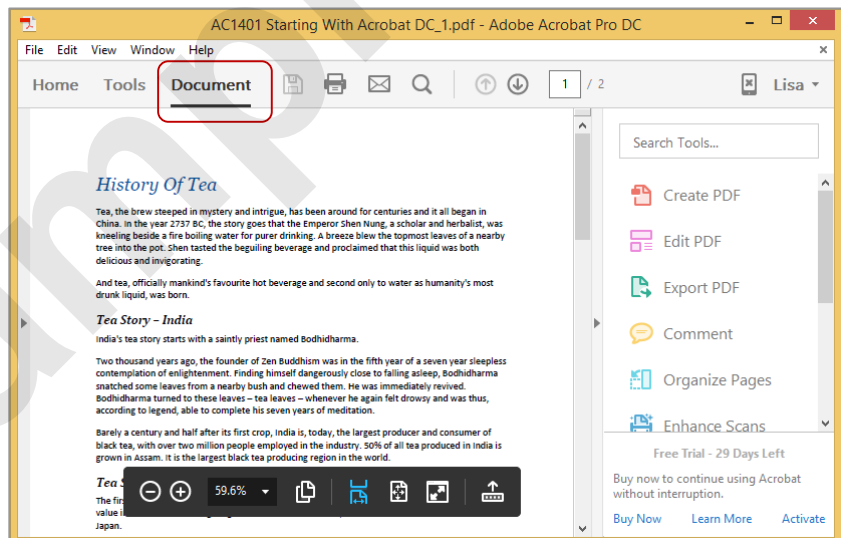e 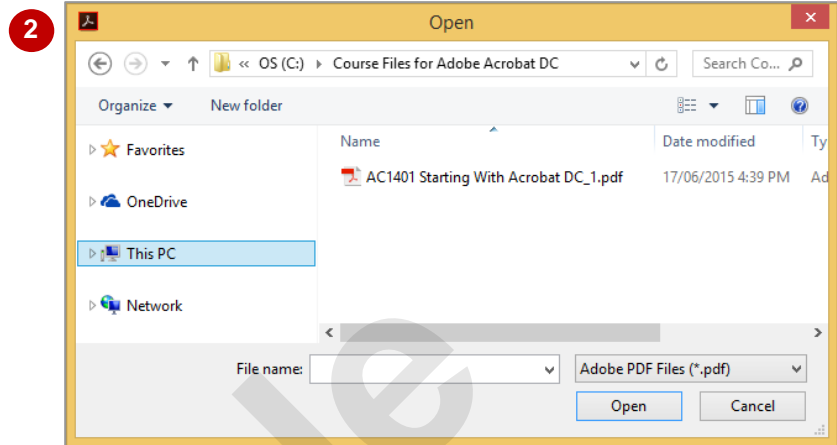list. Alternatively, you can find a PDF by browsing one of the storage locations listed in the left pane. You can also use traditional methods like Acrobat's menu system or opening a file from within File Explorer.

Try This Yourself:

Before starting this exercise ensure that Acrobat has started and the Home view is displayed...

1 Click on *My Computer* under *STORAGE* to display any recent locations that have been visited and a **[Browse]** button in the right pane

2 Click on **[Browse]** to display the *Open* dialog box, then navigate to the *Course Files for Adobe Acrobat DC* folder

3 Click on *AC1401 Starting With Acrobat DC_1.pdf* to select the file, then click on **[Open]**

The PDF will open in Document view by default – notice that the Document tab is selected near the top of the window. Notice also that the Page Controls toolbar displays briefly near the bottom of the window and then disappears. It will reappear again when you point to the area at the bottom of the window

2

3 *By default, when you open a document its width will fill the screen horizontally.*

You can open a PDF document from any view in Acrobat by using the menu system. To do this, select File > Open, browse to the desired folder, click on the file, then click on [Open].

For Your Reference…

To *open* a *PDF document*:

1. Click on the *Home* tab, if necessary
2. Click on *My Computer*, click on **[Browse]**, navigate to the folder location, then double-click on the desired file; or
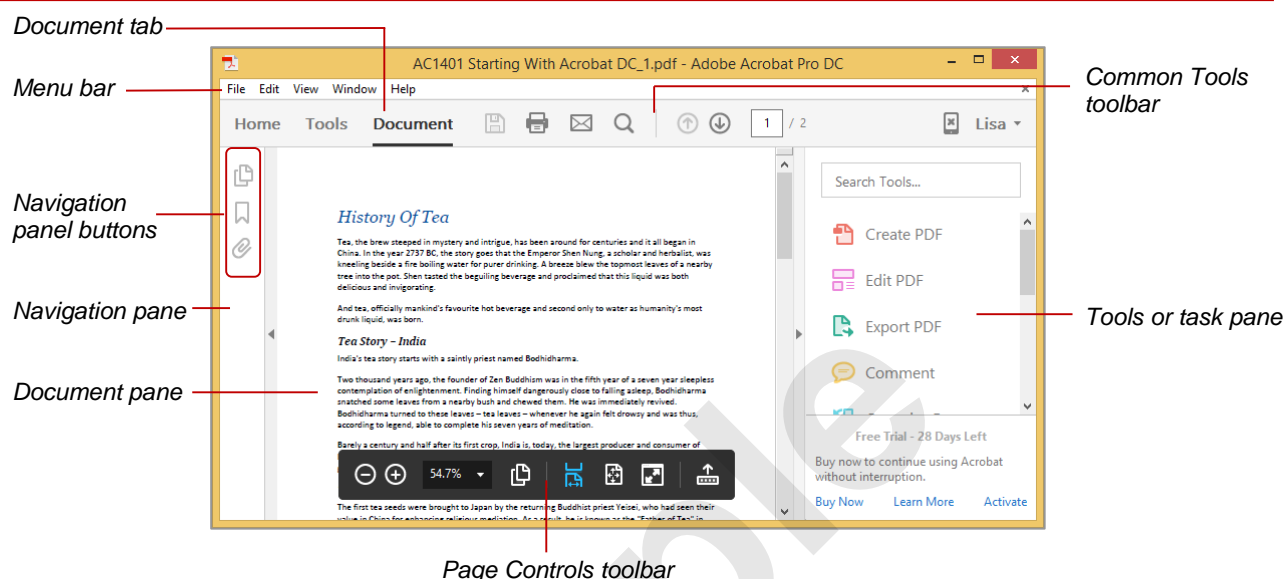   Double-click on the file in the *Recent* file list

Handy to Know…

- You can open PDFs saved in the Document Cloud by clicking on *Document Cloud* in the *Home* tab, then double-clicking on the PDF.

- If you open a second PDF it will open in a new Acrobat window. You can switch between open PDFs by clicking on **Window** in the menu bar and selecting the PDF.

UNDERSTANDING THE DOCUMENT VIEW

When you open a PDF in Acrobat the view automatically changes to the *Document* view. In its default state this view has two open panes: the document pane containing the PDF and the tools pane with the tool shortcuts. The navigation pane, which appears to the left of the document pane, is closed by default. This view also includes several toolbars.

Document tab

Menu bar

Common Tools toolbar

Navigation panel buttons

Navigation pane

Tools or task pane

Document pane

Page Controls toolbar

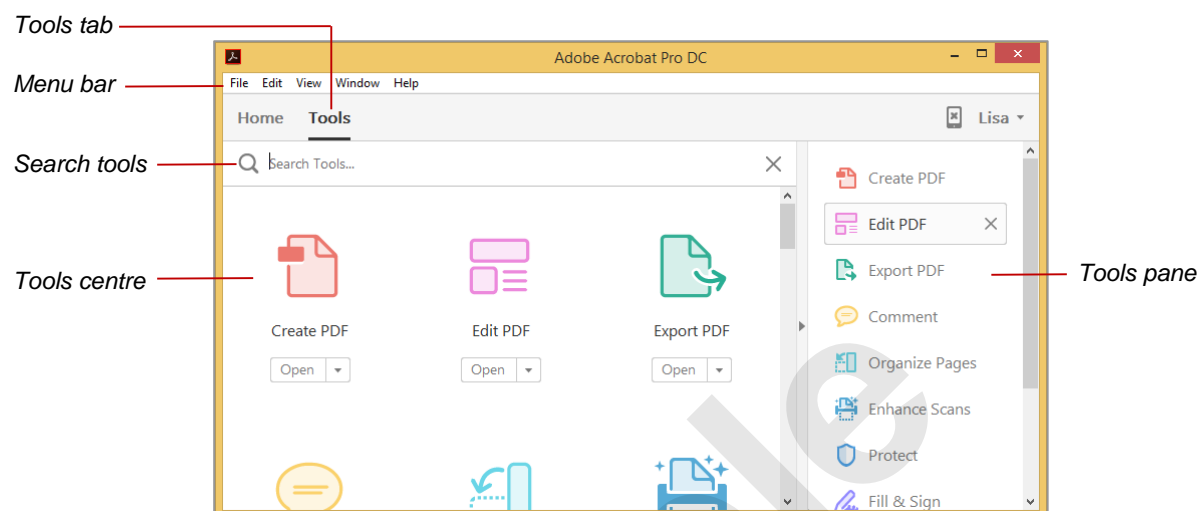|	
Document tab	When you open a PDF it opens in **Document** view and this is shown by the appearance of the **Document** tab to the right of the **Tools** tab. To switch back to the open document from another view, click on the **Document** tab.
Menu bar	The **menu bar** provides access to commands for working in Acrobat. It appears by default at the top of all three views.
Navigation pane	The **navigation pane**, which is closed by default when you open a document but is open in the sample above, provides access to various panels which have commands for working with the open document. For example, you can insert and delete pages, work with bookmarks and insert attachments. To open or close the navigation pane, click on the grey bar to the right of the pane.
	To open a **navigation panel**, such as the **Page Thumbnails** panel or **Bookmarks** panel, click on the appropriate panel button in the navigation pane. The panel will appear to the right of the navigation pane. Not all panels have a button in the default navigation pane. To open one of these panels, right-click on the navigation pane and select it from the menu. The panel's button will remain in the navigation pane until you reset the navigation pane.
Document pane	The **document pane** displays the current page of the document.
Tools or task pane	The **tools pane** displays to the right of the document pane. When a tool is selected in the tools pane or via the menu bar, tool-specific commands will appear in this pane.
	If you need a tool that isn't in the tools pane, click in **Search Tools** at the top of the tools pane. Even if you don't know the tool's name, type a related term such as **hide** to find one of the **Redact** tools.
Common Tools toolbar	The **Common Tools toolbar** displays various tools that you can use to work with PDFs. When a tool is selected in the tools pane or via the menu bar, tool-specific commands will appear in tool-specific toolbar immediately beneath the Common Tools toolbar.
	The Common Tools toolbar is customisable – you can choose to display various file, edit, page navigation, page display, and select and zoom tools. You can also add other tools to the toolbar by customising and showing **quick tools**. Any quick tools added to the Common Tools toolbar will remain there until you choose to either hide them or reset the toolbars.
Page Controls toolbar	The **Page Controls toolbar** displays by default when you first open a document and then whenever you move the mouse towards the bottom of the window. This toolbar will disappear after a few moments.
	If you would prefer to see these tools permanently rather than only when you point to the bottom of the document pane, you can dock them in the Common Tools toolbar. To do this, click on **Move page controls into toolbar** in the Page Controls toolbar. Once docked, the page controls will remain in the Common Tools toolbar until you choose to either undock them or reset the toolbars.

UNDERSTANDING THE TOOLS VIEW

All of Acrobat's available tools are found in the *Tools* view. This view has two panes. The larger pane to the left is known as the *Tools centre* and displays all of the tools. The smaller pane to the right, which is known as the *tools pane*, contains shortcuts for many of the common tools. The tools pane is customisable and can be closed when not required.

Tools tab ⎯

Menu bar ⎯

Search tools ⎯

Tools centre ⎯

Tools pane ⎯

Tools tab	Click on the *Tools* tab to switch to *Tools* view.
Menu bar	The *menu bar* provides access to commands for working in Acrobat. It appears by default at the top of all three views.
Search tools	As well as scrolling through the *Tools centre* to find a specific tool, you can search for a tool even if you don't know its exact name. As you type text in the *Search Tools* box at the top of the pane, Acrobat displays tools that match the search term. For example, if you search for **collaborate**, Acrobat will display the *Send for Comments* set of tools because these tools are useful when you need to work on a document with other people.
Tools centre	The *Tools centre* displays all tools available in Acrobat. This is useful if you are working on a document and need a tool that is not included in the tools pane. You can simply click on the *Tools* tab and either search for or scroll to find the tool.
	Each tool in the *Tools centre* has a pulldown which has options to open the tool module, add a tool shortcut to the tools pane, or to learn more about a tool's capability.
Tools pane	The *tools pane* displays to the right of the *Tools centre*. It also displays to the right of the document pane in *Document* view.
	In its default format, the tools pane contains shortcuts for the most commonly-used tools. However you can easily customise this pane to include just the tools that you regularly use. Either drag the tools from the *Tools centre* or locate the tool in the *Tool centre* and click on **[Add]**. To remove unwanted tools, either point to the tool in the tools pane and click on the *X* or right-click on the tool and select **Remove Shortcut**.
	If a document is currently open, clicking on a tool will switch to *Document* view and tool-specific commands will display in the tools pane and in a tool-specific toolbar. If no document is open and you click on a tool that requires a document, you will be prompted to open one from within Acrobat.
	You can close the tools pane (in both *Tools* and *Document* view) by clicking on the grey vertical bar to the left of the pane. However, you will need to close it each time you switch to either *Tools* or *Document* view as Acrobat does not currently remember this workspace change.

EXITING ACROBAT

When you have finished working with a PDF document it is important to exit correctly – if you don't, you may lose data. If you have made changes to the document and have not saved them, when you choose to close the file or exit Acrobat, you will be asked whether or not you want to save the file first.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file AC1401 Starting With Acrobat DC_1.pdf...
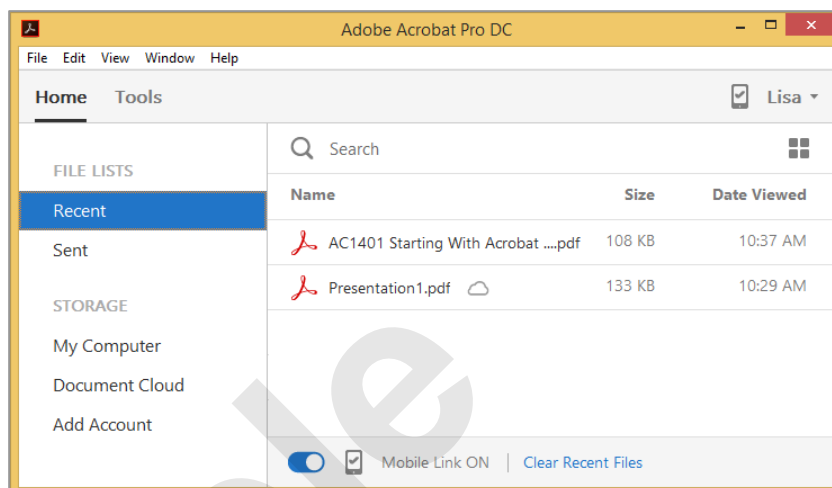
1 Select **File** > **Close**

If you have made any changes to the PDF document, Acrobat will prompt you to save the file. In this case we haven't so the document will simply close, returning to the Home view by default.

Let's shut down Acrobat…

2 Select **File** > **Exit** to close Acrobat

For Your Reference…

To *close* a *PDF document*:
1. Select **File** > **Close**
2. Save any changes if prompted

To *exit Acrobat*:
1. Select **File** > **Exit**
2. Save any changes if prompted

Handy to Know…

- You can exit Acrobat by clicking on *Close* in the top right corner of the application window or by using the keyboard shortcut `Ctrl` + `Q`.

- If you have multiple PDFs opened, selecting **File** > **Exit** will close all instances of Acrobat. If this isn't what you want, select **File** > **Close** to close the desired file only.

CHAPTER 2 — USING TOOLBARS AND MENUS

INFOCUS

Most of the actions you perform in Acrobat are done so using the options and tools available in the various **toolbars** and **menus**. To display a **toolbar**, click on the required category in the tools pane. Each toolbar contains tools specific to the selected category; for example, if you click on **Edit PDF** in the tools pane, the **Edit PDF** toolbar displays across the top of the document and contains tools that allow you to edit the open file, such as **Add Text** and the like.

Additional tools and options for working with documents are available in **menus**. You can access the various menus by clicking on the tabs across the top of the screen such as the **File** tab or the **Edit** tab.

In this session you will:

- ✓ learn how to use menus
- ✓ learn how to work with toolbars
- ✓ learn how to work with tools
- ✓ gain an understanding of the **Create Custom Tool** dialog box
- ✓ learn how to create a custom toolset.

USING MENUS

The *menu bar* contains commands that enable you to perform various operations in your PDF document. Acrobat DC features an abridged m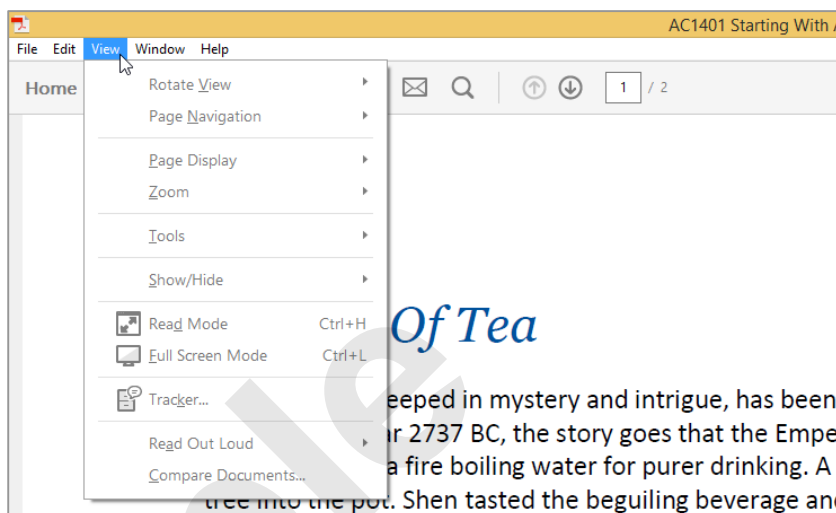enu bar as many of the main commands are available in the tools pane. The options that are found in the Acrobat DC menu bar are considered the most commonly used.
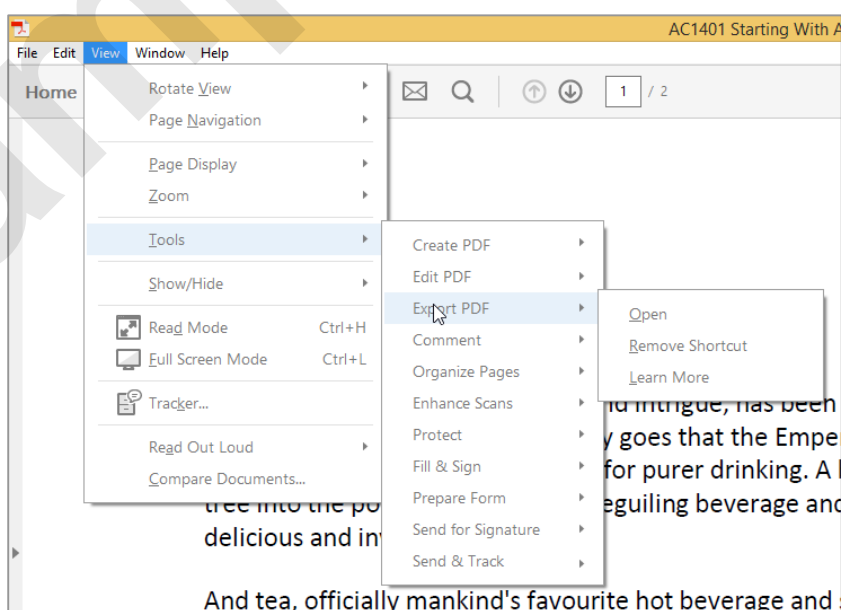
Try This Yourself:

Open File *Before starting this exercise you MUST open the file AC1409 Menus And Toolbars_1.pdf...*

1 Click on **View** on the menu bar to display the **View** menu

A few of the menu options have an arrow to their right. This indicates they have a submenu. Some of the options have an icon to their left showing this option is available on a toolbar…

2 Click on **View** again or press `Esc` to deselect the menu

You can also access menu commands using the keyboard…

3 Hold down `Alt` and press `V` to display the **View** menu again

4 Repeat step *2* to close the menu

5 Press `Alt` + `V` + `T` to display the **Tools** submenu, then point to **Export PDF**

6 Click elsewhere or press `Esc` three times to deselect the menus

1

5

For Your Reference…

To *access menu commands*:

- Click on a desired menu option to select it, or
- Hold down `Alt` and press the underlined character in the command, or
- Press the keyboard shortcut combination – these are shown to the right of menu options

Handy to Know…

- Right-clicking on the screen or on an object that you wish to change will display a *shortcut* or *context* menu. This menu displays commands relevant to the selected item.
- You can hide the menu bar by pressing `F9`. Press `F9` again to redisplay the menu bar.