Course objectives:

- Create and modify PDFs
- Extract and convert content
- Protect and secure documents
- Comment and annotate PDFs

Staff Training (Bookings only)
Phone  (07) 3365 2666
Email  staffdev@uq.edu.au
Web  http://www.uq.edu.au/staffdevelopment

Student Training and Support
Phone  334 64312
Email  askus@library.uq.edu.au

Staff may contact their trainer with enquiries and feedback related to training content.

Please contact Staff Development for booking enquiries or your local I.T. Support for general technical enquiries.

Library services provide the student I.T. Helpdesk service in the UQ Library. They can assist with general enquiries and IT support. This includes computing help and training for UQ students in: Study Management Applications like my.UQ and Learn.UQ (Blackboard), Microsoft Office and I.T. fundamentals like file management, printing and laptop setup.
# Table of Contents

Interface Overview .......................................................................................................................... 3
Welcome Screen .......................................................................................................................... 3
Acrobat X Pro Screen .................................................................................................................. 3

Acrobat X Pro versus Acrobat Pro DC ............................................................................................ 4
Exercise 1. New Tools Panel .................................................................................................. 4

Getting Started ................................................................................................................................ 5
Exercise 2. Setting Acrobat Preferences ........................................................................ 5

Creating PDFs ................................................................................................................................ 7
Exercise 3. Create a PDF from Word .................................................................................... 7
Exercise 4. Set Acrobat as default PDF reader .................................................................... 9
Exercise 5. Create a PDF by Printing from Excel ................................................................. 10
Exercise 6. Create a PDF from PowerPoint ....................................................................... 11
Exercise 7. Create a PDF from within Acrobat ................................................................ 12

Accessibility .................................................................................................................................. 14
Exercise 8. Check a PDF for Accessibility ............................................................................. 14

Converting PDFs ........................................................................................................................... 17
Exercise 9. Convert a PDF to Word ...................................................................................... 17

Consolidating PDFs ...................................................................................................................... 18
Exercise 10. Combine files into a single PDF ..................................................................... 18
Exercise 11. Extract pages from a PDF ............................................................................... 21
Exercise 12. Add pages from another PDF ......................................................................... 22
Exercise 13. Create a Portfolio ............................................................................................... 23
Exercise 14. Edit a Portfolio ................................................................................................... 23

Security and Protection ................................................................................................................. 24
Exercise 15. Restricting user activities ................................................................................. 24

Commenting ................................................................................................................................. 27
Exercise 16. Add comments to a PDF file .......................................................................... 27

Download the exercise files on the Library Services Training Website
https://web.library.uq.edu.au/library-services/training/training-resources
Interface Overview
Open Adobe Acrobat DC from desktop
1. Click Windows icon in taskbar
2. Select Adobe Acrobat DC icon

Welcome Screen

From the Acrobat DC welcome screen you can access one of your recently used files or use the Getting Started menu as a pathway into the application

Home (default welcome)
- Click on any of the files listed

Tools
Click any option to work with PDF’s

Acrobat DC Pro Screen
1. Menus
The menu bar has been consolidated and now displays only 5 headings.
2. Toolbars
Quick Tools and Favourites toolbars are always visible with an open file.
3. The Navigation pane
Contains a number of icons which reveal tools for moving around the document.
4. The Document pane
Acrobat displays the pages of your document here.
5. The Tasks pane
Tools in the Tasks pane are arranged in a series of panels. Each panel can be opened or closed by clicking on its name.
Acrobat X Pro versus Acrobat Pro DC

Exercise 1. New Tools Panel

Panels
Panels give access to various Acrobat components. These components provide the user with various tools to affect the document, the ability to comment on and annotate the document and share it with other users.

1. Open Adobe Word Document2018.PDF
2. Click Tools in the toolbars, to view all the available tools.

Access more tools

3. Click Add beneath Accessibility to add this tool to the Tools Pane.

Notes
Getting Started

Exercise 2. Setting Acrobat Preferences

Set page display magnification

1. Click on Edit > Preferences

Acrobat displays the Preferences dialogue box

2. Click the Page Display category

3. Change Zoom to 100%

4. Click on OK

Whenever a PDF is opened it will be displayed at 100%
Manage PDF file settings

1. Click on Edit > Preferences

2. Select the Spelling category
3. Select Add
4. Click on English (United Kingdom) and place a tick
5. Click on English (United States) and remove the tick
6. Click on OK

7. Select the Units & Guides category
8. Change Page and Ruler Units to Centimeters
9. Click on OK
Creating PDFs

Exercise 3. Create a PDF from Word

Converting a Word document with styles applied

1. Open Microsoft Word
2. Open Adobe Word Document.docx
3. Click the File tab
4. Select Save as
5. Click the Browse button
6. Select PDF (*.pdf) in the Save as type: field
7. Select Optimize for Standard
8. Check Open file after publishing
9. Click the Options button
10. Check Create bookmarks using:
11. Select Headings
12. Click on OK

After conversion your document will open in Acrobat
Navigate file with bookmarks

1. Click on Bookmark icon to expand pane

All the styled text from Word document has been included as a PDF bookmark

2. Click on any bookmark

PDF Settings

After conversion you can access document properties in Acrobat Pro to complete metadata and other settings

1. Click on **File > Properties**

2. Complete metadata on the **Description** tab

3. Click on the **Initial View** tab

4. Change **Navigation tab** to **Bookmarks Panel and Page**

5. Change **Magnification** to **Actual Size**

6. Click on **OK**

7. Close file using **CTRL+W** on the keyboard

This will keep the application open
Exercise 4.  

Set Acrobat as default PDF reader

To ensure your PDF’s open in Acrobat DC you can choose a default program:

1. Open **Windows Explorer**

2. Navigate to **Adobe Word Document.PDF**

3. Right click on filename

4. Select open with…

5. Select **Choose another app…**

6. Click on **Adobe Acrobat DC**

7. Check **Always use the selected program with this kind of file**

8. Click on **OK**

**OR**

9. Click on “**Keep using Adobe Acrobat DC**”
1. Open Adobe Excel Spreadsheet.xlsx
2. Select both worksheet tabs
   Hold CTRL key and click Chart1 tab

3. Click on File
4. Select Print
5. Change the printer to Adobe PDF
6. Click on Printer Properties

7. Change settings as shown:
   - Default Settings: Smallest File Size
   - PDF Security: None
   - PDF Output folder: H:\
   - PDF Page Size: A4
8. Tick all other options
9. Click OK
The output folder can be anywhere you want to store the PDF.

10. Change Settings to “Only print the active sheets”
11. Click Print button

The active spreadsheets will be printed and converted to PDF. After conversion your PDF will open in Acrobat.

If the Excel sheets do not print as desired, adjust Excel Page Layout settings to change how the content is sized.
Exercise 6.  
Create a PDF from PowerPoint

1. Open Adobe PowerPoint Presentation.pptx

2. Click on File
3. Select Export
4. Click Create PDF/XPS button

5. Check Open file after publishing
6. Select Optimize for Standard
7. Click the Options button

8. Click on OK
This will confirm default settings as shown
- Range: All
- Publish options: Slides
- Include non-printing information:
  Document properties
  Structure tags for accessibility
- PDF options: Bitmap text when fonts may not be embedded

9. Click on Publish
Exercise 7.  Create a PDF from within Acrobat

a. Create a PDF

1. Click on Create PDF in the Tools Screen

2. Select Select a File
3. Select Adobe Image.jpg
4. Click on Create

The image will be converted and opened in Adobe Acrobat Pro.
   If you want to save the file choose
   • File > Save as

b. Open a file as a PDF

1. Click on File > Open…
2. Change Files displayed to All Files (*.*)
3. Select the file UQArtGallery.jpg
4. Click on Open

Adobe will attempt to convert the file to PDF and will open it if successful.
If you want to save the file choose
• File > Save as
c. Create a PDF from a file

1. Click on **File>Create**
2. Select **PDF from File...**

3. Change Files displayed to **All Files (*.*)**
4. Select the file **UQlibmaindoor.jpg**
5. Click on **Open**

Adobe will attempt to convert the file to PDF and will open it if successful.
If you want to save the file choose
- **File > Save as**
Accessibility

Accessibility is about making a document ‘accessible’ to people with impaired vision, both blindness and low vision, and impaired mobility. The accessibility features of Acrobat allow pdf files to be used with screen magnifiers, screen readers and braille printers.

Including accessibility features in a pdf also allows for correct reflow and viewing on mobile devices with small screens.

There are two categories of features: those that make reading a pdf easier and those that allow you to create accessible pdf documents.

**Exercise 8. Check a PDF for Accessibility**

1. Open Adobe Word Document.PDF
2. Click on Tools to open pane
3. Select Accessibility panel
4. Click on Full Check
5. Complete settings to
   - Create Accessibility Report
   - All pages in document
6. Click **Select All** button to confirm all checking options
7. Click on **Start Checking** button

A report is generated and displayed in a panel on screen.

**Rectify Accessibility Issues**

1. Click on **Reading order** in **Accessibility** panel
2. Click on **Box 1** in file
3. Select **Text** button in dialogue box
4. Right click on **Object 5**
5. Select **Edit Alternate Text**...
6. Insert Alternative text “Globe icon”  
Only add Alt text for meaningful images. Do not add Alt text on decorative images.

7. Click on OK

8. Repeat to add alternate text to:
   - Object 2 – Man looking at world map
   - Object 4 – Caption
   - Object 2 – La Grande Roue Paris
   - Object 4 – Caption

   Item 3 Path is the hyperlink to external websites

9. Right click on Logical Reading Order… in the Accessibility panel

10. Click Pass

11. Repeat for Color contrast…

12. Click on Full Check

   There should be no remaining issues to be resolved in your PDF
Converting PDFs

Exercise 9. Convert a PDF to Word

1. Open Adobe Word Document.PDF

2. Click on File > Save As
3. Select Microsoft Word > Word Document

4. Click on Settings...
5. Confirm Layout, Comments, Image and OCR settings
6. Click on OK

7. Add conversion at the end of the filename
8. Click on Save

Following conversion there may be some loss of integrity within the document. Headings may not be styled and images and tables may not be correctly aligned.

Notes
Consolidating PDFs

Exercise 10. Combine files into a single PDF

1. Click on Create PDF button
2. Select Multiple Files
3. Select Combine Files
4. Click Next

5. Click on Add Files… > Add Files…
6. Ensure All Supported Formats is showing
8. Click on Open

You also have the option of dragging relevant files onto Combine Files dialogue box.

9. Click on any file
10. Drag to reorder the files as shown: Adobe Image Adobe Word Document Adobe Excel Spreadsheet Adobe Powerpoint Presentation
1. Click on **Options**
2. Ensure **Smaller File Size** is selected
3. Check all options **Accessibility, bookmarks, errors** and **portfolio**
4. Click on **OK**

5. Click on **Combine**

Acrobat will process the files by printing and converting to produce one PDF with all files included. A new PDF will open called BINDER1.PDF

6. Click on **File > Save As**

7. Ensure the File name is “**Binder1.pdf**”
8. Click on **Save**

---

**Notes**
Rename automatically generated bookmarks

1. The bookmarks available in this PDF are the filenames of the original files

2. Right click on Adobe Image bookmark
3. Select Rename
4. Enter “Cover Image”
5. Click in on screen to confirm

Check Binder Properties

6. Click File > Properties
Look at the file size and add descriptive details for the combined PDF

Exercise 11. Extract pages from a PDF

1. Open Binder1.pdf
2. Click on Organize Pages button in Tools Pane
3. Select Extract
4. Enter a range of 2 to 5
5. Click on Extract

6. Click on File > Save As
7. Enter filename Extract
8. Click on Save
9. Press CTRL + W to close file

This will keep Acrobat Pro application open.

Notes

----------------------------------------------------------------------------------------------------------
Exercise 12. Add pages from another PDF

1. Using **Extract.pdf**
2. Click on **Organize Pages** button in Tools Pane
3. Click on **Insert > From File…**
4. Select **Adobe Powerpoint Presentation.pdf**
5. Click on **Open**
6. Enter a location **After**
7. Enter page location **3**
   The whole file will be inserted after page 3
8. Click on **OK**
9. Click on **Save** icon in toolbar
10. Press **CTRL + W** to close file
    This will keep Acrobat Pro application open.

---

Notes

---

22 of 28 Adobe Acrobat DC: Essentials
Exercise 13. **Create a Portfolio**

Use a portfolio as a container to hold a number of other documents, including PDF and other formats. ⚠️ You will need Flash Player to use this tool.

1. Click on **Create PDF button**
2. Select **Multiple Files**
3. Select **Create PDF Portfolio…**
4. Click **Next**

5. Add your files by selecting **Add Files…**
6. Select **Adobe Image.jpg**
7. Click on **Create**

The Portfolio is created and opened for viewing and editing.

---

Exercise 14. **Edit a Portfolio**

Add files to a portfolio

1. Select **Add Files…**
2. Hold **CTRL** key and click
   - Adobe Excel Spreadsheet .xlsx
   - Adobe Powerpoint Presentation.pptx
   - Adobe Word document .pdf

3. Click on **Open**

Access portfolio content

1. Click any file
2. Select **Preview**
3. Select **Open Document** to open file
4. Right Click a file and select **Show Information** to get file information
5. Click on close icon [x] to return to file

Remove files from a portfolio

1. Click on the **Rubbish Bin** icon
   **OR**
   - Right click on file and select **Delete**

Security and Protection

**Exercise 15. Restricting user activities**

1. Open **Binder 1.PDF**
2. Click **File** menu
3. Choose **Properties**
4. Select the **Security** tab

5. Click the drop down arrow next to **Security Method**

6. Choose **Password Security**

7. Go to the **Permissions** area. Place a tick in **Restrict editing and printing**
   - Enter the letter "a" as a **password**
   - Printing allowed **None**
   - Change allowed **None**
   - Clear **Enable copying if necessary**
   - Check **Enable Text Access**
   - Choose **OK**

Permissions disclaimer

8. Click on **OK**
Confirm password

9. Re-enter the letter “a” as a password to confirm
10. Click on OK

Permissions aren’t officially set until the file is saved.

11. Click on OK

12. Click on Save icon in toolbar

Check Security

1. Check title bar for (Secured)
2. Click the File menu
3. Choose Properties
4. Select the Security tab to check Document Restrictions

Notice most restrictions are now Not Allowed
5. Click on OK

Notes
Commenting
The Adobe PDF annotation mechanism includes a broad set of highlighting, drawing and other tools that you can use to add comments to a document.

**Exercise 16. Add comments to a PDF file**

1. Open Extract.pdf
2. Click on Comment in Tool pane
3. Tools available include:
   - Sticky note
   - Highlight
   - Attach file
   - Record Audio
   - Add Stamp
   - Text markup
   - Text boxes
   - Callouts
   - Lines, Shapes and Freeform
4. Click on a Sticky Note tool
5. Click in document
6. Enter a comment
7. Click the cross to close sticky note
8. Hover mouse over note icon to preview message
   Double clicking a comment icon opens the associated pop-up and allows editing

**Add Stamps**

1. Click on arrow beside Add Stamp tool
2. Select Show Stamps Palette
3. Click on a Stamp

---

Notes

---

27 of 28 Adobe Acrobat DC: Essentials
You may be required to complete personal details when using some stamps

4. Fill in relevant details
5. Click on **Complete** button

6. Click in document to apply stamp

**Annotate to mark text**

1. Click on Insert text tool
2. Enter any text in message box
3. Click on Underline tool
4. Select text in document
5. Click on Add note to text tool
6. Enter text in message box