



Course objectives:

- Create interactive forms
- Manage form fields and properties
- Use forms in Adobe Reader
- Use PDF Actions
- Digital Signatures

This course does not cover LiveCycle.

Staff Training (Bookings only)

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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.

Student Training and Support

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Prior to commencing training, it is recommended staff open Microsoft Outlook to make use of their email client during the session.

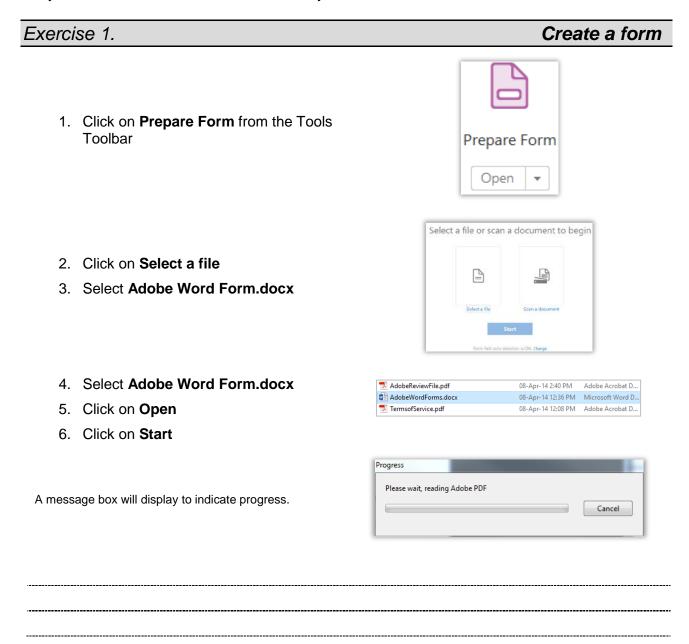
Overview

Open Adobe Acrobat DC from desktop

- 1. Click Windows icon in taskbar
- 2. Select Adobe Acrobat DC icon

Creating Forms

You can create a form by converting an existing electronic document. Acrobat will detect fields in the document and add interactive forms fields to the form. The placement of automatic form fields may need to be examined to ensure accuracy.





If your form is in a table with no borders Acrobat may not be able to recognise spaces for form fields. Add cells borders to assist with the automatic conversion process

Your form will be displayed with some form fields already in place, although some modifications may be required.

Adobe Acr	obat	
1	No new form field annotations were detected.	
		ОК

If your document is recognised as a form, fields will be automatically added to the file and you enter Form Editing Mode

The Forms Tasks panel will open to the top



CLASS REGISTRATION FORM

	-	
Class Title		18
Date	8	2
Time 📼	am	pm
Venue	-	•

Customising Forms

The form toolbar opens at the top of the screen whilst Form Editing is active. Form fields available for use include:

TI	Text Field	Lets the user enter text responses
✓	Check Box	Provides yes or no choices
$\textcircled{\bullet}$	Radio Button	Allows users to select one item from a selection
	List Box	List of options to choose from. Can be set to allow multiple items using CTRL button
	Dropdown	Allows user to choose an item or enter a response
ОК	Button	Initiates an action such as submitting a form
<u>ت</u> ف	Digital Signature	Uses a digital signature to sign a PDF
	Barcode	Encodes data that people type into a form

Exercise 2.

- 1. Click on Investors in Education field
- 2. Press delete

Alpheius Global Enterprises Investors in Education

Remove form fields

I ICOS UCICLE

Adobe Acrobat Pro X: Forms

3. Repeat for Time field



Properties...

Cut

<u>C</u>opy <u>D</u>elete

Time

Time

lext Field Properties

CLASS REGISTRATION FORM

- 4. Right click on Class Registration Form field
- 5. Select **delete**

Form Field Properties

The properties displayed when working with form fields will vary between field types but the following are examples of the types you could see:

General – Name, Tooltip, Common Properties Appearance – Borders and colours, Text size Options – Alignment, default value, character limit Actions – Set triggers and actions Format – Various formatting categories to control how text appears e.g. number, percentage, dates and time Validate – allow validation of entries to prevent incorrect data being entered e.g. number range Calculate – Use field to perform simple calculations

General Appearance Position Options Actions Format Validate Calculate Name: Investors in Education Tooltip: Investors in Education Common Properties Read Only Orientation: 0 Locked Close

Exercise 3.

1) Add a Radio form field

- 1. Click the **Radio field** button on the toolbar
- 2. Click to add form field beside "am"
- 3. Change choice name to **Time AM**
- 4. Click Add Another Button
- 5. Click to add form field beside "pm"
- 6. Change choice name to **Time PM**

Ensure radio buttons belong to the same group.

7. Click in document to close properties box

2) Add a Dropdown list field

Add form fields

Radio Button Choice: 🗊	
Time AM	
Group Name:	
Group3	-
📃 Required field	All Properties
Add Another Button	
gro, pm	
Radio Button Choice: 🧃	
Time PM	
Group Name:	
Group3	



- 1. Delete the Venue field
- 2. Select the **Add drop down list** button on the toolbar
- 3. Click and drag to add form field beside "Venue"
- 4. Change Field Name to Venue
- 5. Click All Properties
- 6. Choose the Options tab
- 7. Select the Item field:
 - Type eZone 1 Click the Add button
 - Type **eZone 2** Click the **Add** button
 - Type eZone 3 Click the Add button
 - Type Meeting room Click the Add button
 - Type **Choose a venue** Click the **Add** button
- 8. Select **Meeting room** Click the **Up** button to move entry to the top
- 9. Select Choose a venue

Doing this makes it the default choice

- 10. Click the Up button to move entry to the top
- 11. Click the **Close** button

Exercise 4.

1) Edit Date field

To create a date field you place a text field and change the format to recognise dates.

- 1. Double click the **Date** field
- 2. Check Required box on General tab

Ŧ	Dropdown3 - 10 enter a ver	iue.
	Field Name:	
ų	Required field <u>All Prop</u>	<u>erties</u>

Dr	opdown Pr	roperties						
	General	Appear	ance	Position	Options	Actions	Format	Va
		Add						
	Export							
	lte	em List:		oose a ven eting Roon			Delet	e
				ne 1 ne 2			Up	
			Ezo	ne 3			Dowr	۱

Modify fields and properties

General	Appearance	Position	Options	Actions	Format	Validate	Calculate	
	Name:	Date						
	Tooltip:	Date						



- 3. Select the Format tab
- 4. Choose Date format
- 5. Custom format
- 6. Enter: dd/mm/yy

Entering yyyy will force user to enter the full year as part of a date entry

7. Click Close

Required fields will display in red in "edit form " mode.

2) Editing field properties

1. Double click the field next to **Member Number**

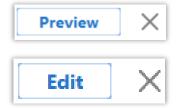
	Appearance	Position	Options	Actions	Format	Validate	Calculate
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	m/d/yyyy H Custom	HIMIN					

Members	ship Number			Mer	nbersl	hip Nu
Te	ext Field Properties					
- 1	General Appeara	nce Position	Options	Actions	Format	
	<u>A</u> lignment:	Left v				
- 1	<u>D</u> efault Value:					
- 1						
- 1		Field is use	d for file se	election		
- 1		Check spel	ling			
- 1		Scroll long		atting		
		Limit of	0	charact	ers	
		Com <u>b</u> of	8	charad	ters	

- 2. Go to the **Options** tab
- 3. Clear Scroll long text
- 4. Clear Check spelling
- 5. Check Comb of and use 8 characters
- 6. Click on Close

3) Preview form fields

- 1. Click on **Preview** button to see live form as users
- 2. Click **Edit** button to return to form editing



Exercise 5.

- 1. Click on File in menu bar
- 2. Select Save As



Save and close form

5 A	dobeV	/ordFor	ms.pdf - A	dobe Acrobat Pro DC	
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3.	Specify a location and filename
	"Adobe Word Form.pdf"

4. Click on Save

Click on File
 Select Close

File name:	Adobe Word Form.pdf	
Save as type:	Adobe PDF Files (*.pdf)	
	Settings	
		Save

Adobe Word Form.pdf - Adobe Acrobat	Pro DC
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<u>C</u> lose	Ctrl+W

Name

📓 Adobe Word Forms.pdf

Exercise 6.

1) Access edit forms mode

- 1. Click on File in menu bar
- 2. Select Open
- 3. Navigate to Adobe Word Form.PDF
- 4. Click on **Open**

Your file is presented in **fill-in form** mode.

5. Select **Prepare Form** on the tools pane

This will activate form editing mode



CLASS REGISTRATION FORM

		Venae	Choise aveca
		Membership Number	
		Firstname	
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		Company Cigavitation	
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19	Dronaro	Form	
	Prepare	FUITI	



2) Add Signature field

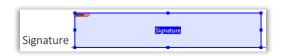
- 1. Delete the **undefined** field beside Signature
- 2. Click on the Digital Signature Legibutton
- 3. Click and drag to add form field beside **Signature**
- 4. Double click on **signature** field
- 5. Got to **Signed** tab
- 6. Select Mark as read-only

When the signature is added to the form, nothing can be changed

Exercise 7.

1) New button to Print

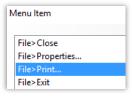
- Select the Add a 'print' or 'clear' button on the toolbar
- 2. Click and drag to draw a button field
- 3. Change the Field Name to Print
- 4. Click All Properties
- 5. Choose the Options tab
- 6. In the Icon and Label section click in the Label area
- 7. Enter Print as the label
- 8. Select the Actions tab
- 9. Choose Mouse UP for Select Trigger
- 10. Choose **Execute a menu item** for Select Action
- 11. Click the Add... button
- 12. Select File > Print... from list
- 13. Click on OK
- 14. Click on Close



Digital Signature Properties General Appearance Position Actio O Nothing happens when signed	ns Signed				
General Appearance Position Actio	ns Signed				
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_	ns Signed				
_	ns Signed	1			
○ <u>N</u> othing happens when signed					
○ <u>N</u> othing happens when signed					
O Nothing happens when signed					
	O Nothing happens when signed				
The following option is compatib	le only with Acroba	at			
5	· ·				
Mark as read-only: All field		a I			
Williark as read-only: All field		1.1			

Create interactive buttons

Button1
Field Name:
Print
Required field <u>All Properties</u>
utton Properties
General Appearance Position Options Actions
Layout: Label only V Advanced
Beha <u>v</u> ior: Invert v
Icon and Label
State: Up
General Appearance Options Actions
Add an Action
Select Trigger: Mouse Up
Select Action: Execute a menu item
Add





2) New button to Submit

- Select the Add a 'print' or 'clear' or other kind of button button on the toolbar
- 2. Click and drag to draw a button field
- 3. Change the Field Name to Submit
- 4. Click All Properties
- 5. Choose the Options tab
- 6. In the Icon and Label section click in the Label area
- 7. Enter **Submit** as the label
- 8. Select the Actions tab
- 9. Choose Mouse Down for Select Trigger
- 10. Choose Submit a form for Select Action
- 11. Click the Add... button
- 12. In the Enter a URL for this link type **mailto:**'name@domain.com'
- 13. Select PDF The complete document

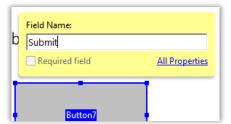
The email address link on the button is the email address you want the results mailed to

14. Click OK

The selected action will appear in the Actions section

15. Click **Close**

The Submit button will appear



Button Properties
General Appearance Position Options Actions
Layout: Label only v Advanced
Behavior: Invert v
Icon and Label
<u>S</u> tate:
Up La <u>b</u> el: Submit
Icon: Choose Icon
Clear

ld an Action		
Select Triggen	Mouse Down 🗸	
elect Action:	Submit a form	×

nter a URL for this link:	
mailto: luke@mine.com	نة: الا
Export Format	Date Options
OHTML	Convert dates to standard format
O XFDF Include:	
Field data	
Comments	Dates are submitted in
(PDE The complete document	D:YYYYMMDD format instead of passing the user typed values
	through unchanged.

Ad	d an Action	Position Options Acti	
3	jelect Triggen	Mouse Up 🔍 🗸	
	Select Action;	Submit a form	*
			Add
Act	tions		
		vn : a form	

Exercise 8.



Preview a form

1. On the toolbar at the top of Acrobat find and press the **Preview** button

Your editing options will 'grey out' and the preview button will turn into an Edit button.

Hover over the submit button and a tooltip for sending the data to the designated email address will appear.

The form has become active even in Preview mode

2. Click the **Edit** button to return to Edit mode

Preview X
Submit Send the data to
Edit X

TI More -
Convert to E-Sign Form
<u>D</u> uplicate Across Pages <u>C</u> reate Multiple Copies
Show Tab Numbers Show Field <u>P</u> roperties
 ✓ E⁺ Highlight Existing Fields □ I G Clear Form

- 3. Click More in the tools panel
- 4. Select Clear Form

This should also be done before the form is distributed

5. Click on Save

Security and Protection





Postricting usor activitios

	Restricting user activities
	Eite Edit View Window Help
	Create >
	E Save Ctrl+S
1 Oliek File menu	Save <u>A</u> s Shift+Ctrl+S
1. Click File menu	Save as Ot <u>h</u> er →
2. Choose Properties	Export To
·	Attach to Email
	Revert
	<u>C</u> lose Ctrl+W
	Prop <u>e</u> rties Ctrl+D
	Document Properties
	Description Security Fonts Initial View Custom Advanced
	Document Security
	The document's Security Method restricts what can be done to the document. To represent the Security Method to No Security.
	Security Method: No Security
	Can be Opened by: Acrobat compatibility information unavailable
	Document Restrictions Summary
	Printing: Allowed
Select the Security tab	Changing the Document: Allowed
	Document Assembly: Allowed
	Content Copying: Allowed
	Content Copying for Accessibility: Allowed
	Page Extraction: Allowed
	Commenting: Allowed
	Filling of form fields: Allowed
	Signing: Allowed
	Creation of Template Pages: Allowed
	Description Security Fonts Initial View Custom Advanced
	Document Security
4. Click the drop down arrow next to Security	The document's Security Method restricts what can be done to the document. To remove restrictions, set the Security Method to No Security.
Method	
5. Choose Password Security	Security Method: No Security Volume V
	Can be Opened by: Certificate Security
6. Go to the Permissions area. Place a tick in	
Restrict editing and printing	Permissions
7. Enter the following settings	Restrict editing and printing of the document. A password wi
	Change Permissions Password: *
Change permissions password a	Printing Allowed: None
Printing allowed None Change allowed None	
Change allowed None	Changes Allowed: None
Clear Enable copying if necessary	Enable copying of text, images, and other content
Check Enable Text Access	Enable text access for screen reader devices for the visually
Click on OK	

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Adobe Acrobat All Adobe products enforce the restrictions set by the Permissions Password. However, not all third-party products fully support and respects these settings. Recipients using such third-party products might be able to bypass some of the restrictions you have set. Permissions disclaimer 8. Click on OK 🔲 Do not show this message again ОК Adobe Acrobat - Confirm Permissions Password Confirm password Please confirm the Permissions Password. Be sure to make a note of the password. You will need it to change these settings in the future. 9. Re-enter the password a Note: If a Document Open Password is set, the Permissions Password will also open the document and bypass the security settings. 10. Click on OK Permissions Password: OK Cancel Adobe Acrobat Security settings will not be applied to the document until you save the document. You will be able to continue to change security settings until you close the document. Permissions aren't officially set until the file is saved. 11. Click on OK 🔲 Do not show this message again 2 ОК

- 12. Save as Adobe Word Form 2.pdf
- 13. Press ctrl+w

14. Open Adobe Word Form 2.pdf

The security restrictions will not apply until document is closed

Check Security

- 15. Check title bar for (Secured)
- 16. Click the File menu
- 17. Choose Properties
- 18. Select the **Security** tab to check Document Restrictions

Notice most restrictions are now Not Allowed

19. Click on OK

Repeat protection with the following settings

- Change permissions password a
- Printing allowed **None**
- Change allowed Fill in Forms
- Clear Enable copying if necessary
- Check Enable Text Access
- Click on OK







Signing and Certifying

There are two ways of electronically signing a pdf. Signing and Certifying. Signing a pdf means that **you agree with the contents** e.g. a contract. Certifying a document means that **the document can be verified as having come from you**. The processes involved in signing and certifying pdf's are the same.

Signing and certifying a pdf file allows for a verifiable way of proving a document in its current form up to that point.

The ability to sign or certify a pdf requires the creation of a digital ID and a Certificate.

There are 4 steps involved in comprehensively signing and certifying PDF documentation.

- 1. Create a digital ID
- 2. Create a certificate from that ID
- 3. Send certificate, to colleagues, for importing to recognise you as a trusted identity (*The presence of a trusted identity allows acrobat to verify the identify the signer of a PDF document*)
- 4. Sign a document and send

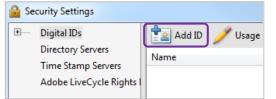
Exercise 10. Create a digital signature

1) Create a digital ID

A digital ID is collection of data that electronically identifies a person. This data is embedded in a signed document to identify the signer.

- 1. Click Edit > Preferences...
- 2. Select the **Signatures** category
- 3. Click More... button under Identities & Trusted Certificates
- Categories Digital Signatu Page Display Creation & Appea 3D & Multimedia Control options for signa Set the appearance of sig Accessibility Action Wizard Security Security (Enhanced) Signatures Spelling Tracker Trust Manager Units & Guides Digital Signatures Creation & Appearance Control options for signature creation
 Set the appearance of signatures within a document
 More... Ventication Control how and when signatures are verified More... tities & Trusted Certificates Create and manage identities for signing
 Manage credentials used to trust docume More...

- 4. Click Digital ID's
- 5. Click on Add ID





		Add Digital ID
	Select A new digital ID I want to create now Click on Next	Add or create a digital ID to sign and encrypt documents. digital ID is sent to others so that they can verify your sign My existing digital ID from: A file A roaming digital ID accessed via a server A device connected to this computer A new digital ID I want to create now
Digital I standar	Select New PKCS#12 digital ID file D is preferable as a cross-platform industry d Click on Next	Add Digital ID Where would you like to store your self-signed digital ID? New PKCS#12 digital ID file Creates a new password protected digital ID file that of This common digital ID file format is supported by m including major web browsers. PKCS#12 files have a. Windows Certificate Store Your digital ID will be stored in the Windows Certificat to other Windows applications. The digital ID will be
	. Complete as much information as required . Click on Next	Add Digital ID Enter your identity information to be used when generating the self-signed certificate. Name (e.g. John Smith): Luke Gaiter Organizational Unit: LARS Qrganization Name: UQ Library Email Address: Iuke@mine.com Country/Region: AU - AUSTRALIA Key Algorithm: 1024-bit RSA Use digital ID for: Digital Signatures and Data Encryption
Passwo docume For trair accepta real life.	Accept default storage location and file name and needs to be supplied every time you sign a ent and must be at least 6 characters long hing purposes the password ' abcdef ' is ble but please note this is not a good idea in . Click on Finish	Add Digital ID Enter a file location and password for your new digital ID file. You will need the password when you use the digital ID to sign or decrypt documents. You should make a note of the file location so that you can copy thin file using the Security Settings dialog. File Name: VUsers' Security/David.pfx Password: Cancel < Back Finish
box and	be returned to the Security Settings dialog I your digital ID is created and stored . Close the Security Settings box	Add ID Usage Options ~ Certificate Details Export Refresh Rem Name Issuer Storage Mechanism Luke Gaiter <luke@mine.com> Luke Gaiter <luke@mine.com> Digital ID File</luke@mine.com></luke@mine.com>

Exercise 11.



- 2. Search in the Tools panel for Certificates
- 3. Select Certificates
- 4. Click **Digitally Sign** from the **Certificates** menu at the top of your document
- 5. Click on OK

7. Select a digital ID

Signed.pdf"

11. Click on Save

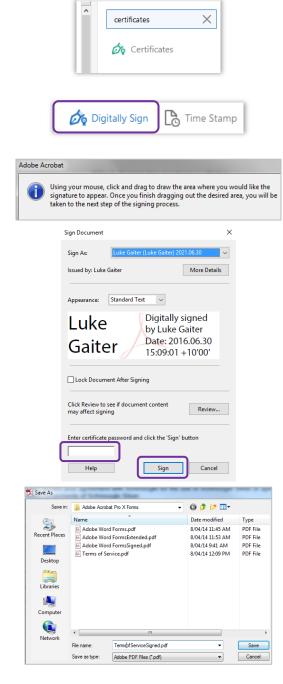
9. Click Sign

8. Enter the appropriate password

10. Add filename "Terms of Service

6. Click and drag to add signature location

Digitally sign a document



12. Digital signature appears on the document





A banner will display after digital signature is placed

Clicking the signature also shows if the signature is valid

Signed and all signatures are valid.

Signature Validation Status





More...

Storage Mechanism

2) Create a certificate

Once you have created a digital ID you can then create a certificate that contains the digital ID information. The certificate can be sent to others, who then imports it into their copy of Acrobat as a trusted identity.

- 1. Click Edit > Preferences...
- 2. Select the **Signatures** category
- 3. Select More... under Identities & Trusted Certificates

Signatures	
Spelling	
Tracker	
Trust Manager	
Units & Guides	~

📩 Add ID 🥖 Usage Options 🗸 💦 Certificate Details 🏾 🔿 Export 🛛 🕄 Refresh 🛛 😣 Remove ID

Identities & Trusted Certificates

Name

File r

Save

Create and manage identities for signing
 Manage credentials used to trust documents

Issuer

Data Exchange File - Export Options

You have chosen to export the following data:

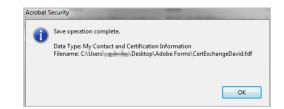
Luke Gaiter <luke@mine.com> Luke Gaiter <luke@mine.com> Digital ID File

- 4. Click **Digital ID's**
- 5. Select ID
- 6. Click Export button
- 7. Select Save the data to a file
- 8. Click on Next

9. Specify a name and location for the file The file is saved in an **Acrobat FDF** format

- 10. Click on Save
- Save message appears
 - 11. Click on OK
 - 12. Repeat step 6 and select **Email the** data to someone.

	My Ce	rtificate(s)		
	by you	cates are exported to allow the recipi a and to encrypt documents for you. your private key.		
	Export C	Options		
	Select	whether you want to save the data to	o a file or share it via e	email:
	\bigcirc	Email the data to someone		
	۲	Save the data to a file		
			Next	Cancel
ame	e:	Cert Exchange	→	Save
as	type:	Acrobat FDF Data Exchange (*.fo	#f) ▼	Cancel





Send Certificate

- Send the certificate as an attachment to recipients who need to verify your signature
- This will have to be imported by recipient to recognise your signed documents as a trusted identity

_	То	Fiona Stroud (
ت= ا Send	Сс	
	Bcc	
	Subject	Adobe ID Certificate
	Attached	CertExchangeDavid.fdf (1 KB)

3) Trusted Identities

When you receive a certificate from another person you must import the certificate into Acrobat as a trusted identity. This will allow Acrobat to recognise signed or certified documents from the person whose certificate you have imported. This can be done from the attachment received or via Acrobat Pro.

- 1. Click Edit > Preferences...
- 2. Select the **Signatures** category
- 3. Select More... under Identities & Trusted Certificates

4. Click on Trusted Certificates...

5. Click on **Import**

6. Click Browse

Navigate to where the certificate is stored

Signatures	
Spelling	
Tracker	
Trust Manager	
Units & Guides	~

Digital IDs Trusted Centificates	Idit Trust import import Name Atfaltamp TS Services Atfaltrust TS Services Allampolgini Tamothimykiadó - Q ALMERYS CUSTOMER SERVICES C ALMERYS BOOT CA		Remove Expires 2012;12:20:12:14:03:3 2012;11:16:06:54:47:3 2030;12:18:11:27:19:2
Trusted Certificates	AlfaStamp TS Services AlfaTrust TS Services Állampolgán Tanúsítványkiadó - Q. ALMERYS CUSTOMER SERVICES C	AlfaSign Qualified CA AlfaSign Public CA Fótanúsítványkiadó - Kormányzat	2012.12.20 12:14:03 2 2012.11.16 08:54:47 2
	ALMERVS CUSTOMER SERVICES C		
	ALMERTS KUOT CA	ALMERYS ROOT CA	2022.08.29 10:04:19 2 2036.08.24 06:55:53 2
oose Contacts to Impor	t		
			Browse
			Search
Certificates			
Contraction of the second	certificates associated with the	currently selected contact.	
Contraction of the second	certificates associated with the o	currently selected contact.	Details
			Search

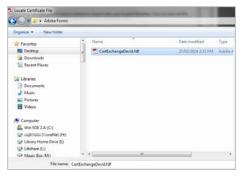


7. Select the ID file to import

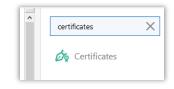
8. Click on **Open**

You are returned to Choose Contacts to Import dialog box

9. Choose Import



Import Compl	lete		
Import det	ails:		
Importing	Contact 'David' suc	cceeded.	
1 certifica	te(s) imported and a	added to 'David'.	
			ОК
Digital ID and Trusted Cer	térata fattinan		
Digital IDs	🥖 Edit Trust i 🦐 Import ≓	Export (Certificate Details (Remove
Trusted Certificates	Name LAWhust AdSign Centification Aut LAWhust Root Centification Autho LGPRI Lichtenstein Post Qualified CA Isign-qualified-01 LIST Service di centificacione per L.	Certificate Issuer LAWbust Root Certification Auth. LAWbust Root Certification Auth. LAWbust Root Certification Auth. A-Trust-Quel-01 LIST Service di certificazione per LIST Service di certificazione per Luks Ciette s'Aler Brente.com	2012.05.16 16:10.18 Z 2018.08.20 14:59:59 Z 2018.04.01 16:59:55 Z 2019.05.13 13:30:00 Z 2016.09.02 14:14:44 Z
Import Contact Settin	gs	-	1 4 1
Certificate Detail			
Subject: David		Ê.	
Issuer: David			
Usage: Sign tr	ansaction, Encrypt document		
Expiration: 26	03/2019 11:14:18 PM		
Trust Polic	y Restrictions		
chain up to	used to sign a document mu a trust anchor in order for sign not performed on or above a	nature validation to succee	
Use this	certificate as a trusted root		
If signature	validation succeeds, trust this	certificate for:	
(7) Signe	d documents or data		
😥 Certif	ied documents		
	Dynamic content		
8	Embedded high privilege	JavaScript	
	Privileged system operation access, etc.)	ons (networking, printing, f	ile



Presented with an Import Complete dialog box

10. Choose OK

Returned to Manage Trusted Identities dialog box. You will need to specify what the new trusted identity can do.

11. Click Edit Trust

12. Tick Use this certificate as a trusted root box

13. Tick Certified documents box

You should **NOT** tick the dynamic content, embedded Java script and privileged system operations check boxes. Doing so would potentially allow validation of documents that may change after they have been signed.

- 14. Click **OK** to return to Edit Contacts
- 15. Close Digital ID and Trusted Certificate Settings
- 16. Click **OK** to complete

4) Sign document

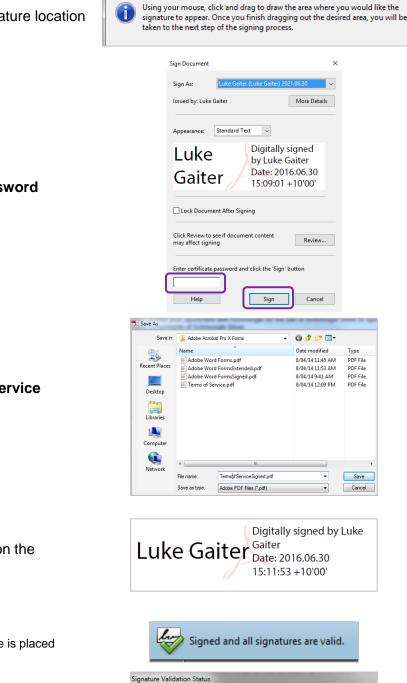
- 17. Open Terms of Service.pdf
- 18. Search in the **Tools** panel for **Certificates**
- 19. Select Certificates



💪 Digitally Sign

Adobe Acrobat

- 20. Click **Digitally Sign** from the **Certificates** menu at the top of your document
- 21. Click on OK
- 22. Click and drag to add signature location



- 23. Select a **digital ID**
- 24. Enter the appropriate password
- 25. Click Sign

- 26. Add filename "Terms of Service Signed.pdf"
- 27. Click on Save
- 28. Digital signature appears on the document

A banner will display after digital signature is placed

Clicking the signature also shows if the signature is valid

In

Distribute and Collate Forms

There are 3 main steps in dealing with Acrobat forms successfully

- 1) **Distribute** send form to recipients
- 2) Respond complete PDF form via Adobe Acrobat or Adobe Reader
- 3) Collate collect and track responses

Exercise 12.

Reader Extended PDF

Ctrl+O

Without a copy of Acrobat Pro, ordinarily it is not possible to save filled in form information. However, it is possible to extend this functionality to people with a copy of Acrobat Reader 8 or later by saving the form as a reader extended PDF

<u>E</u>dit <u>V</u>iew <u>W</u>indow <u>H</u>elp

Den...

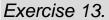
- 1. Open Adobe Word Form.pdf
- 2. Click Edit PDF from the Tools pane
- 3. Enter password
- 4. File > Save As Other> Reader Extended PDF > Enable More Tools (includes form fill-in & save)....

Create			Þ		
Save			Ctrl	+S	
Save <u>A</u> s			Shift+Ctrl-	+S	
Save as Ot <u>h</u> e	r		Þ		
Expor <u>t</u> To	Reduced Size F				
Attach to	Certified PDF				
	Reader Extend				
Revert	_	eurbr	ſ		
Close	O Enable	<u>C</u> ommenting	g & Measu	uring	
Propertie	Ar Enable	<u>M</u> ore Tools (includes fo	orm fill-in a	& save)
	Press-Ready P	DF (PDF/ <u>X</u>)			
nable Usage Right	ts in Adobe Reade	er			X
the free - Save fo - Comm - Sign ar - Digitall	wing features will Adobe Reader. Imm data (for a filla enting and drawir n existing signatur y sign the docum nly supported in A	ble PDF form ng mark-up to e field ent anywhere	only) ols on the page		·
content	or inserting and d	eleting pages,	_	icted. ve Now	Cancel
Document Restrict		Allowed			
Chan	Printing: ging the Document:	Allowed *			
	ocument Assembly:				
	Content Copying:				
Content Copyi	ng for Accessibility:				
	Page Extraction:	Allowed			
	Commenting:	Allowed			
F					
11 '	illing of form fields:	Allowed			
	-	Allowed Allowed			
Creation	-	Allowed Not Allowed *			

Enable usage rights in Adobe Reader opens

- 5. Click Save Now
- 6. Save as Adobe Word Form Extended.pdf
- 7. Click **File > Properties** to see what restrictions have been added
- 8. Click on Ok
- 9. Click File > Close







Distribute, complete and track forms

- 1) Distribute via email
 - 1. Open Adobe Word Form.pdf
 - 2. Select **Prepare Form** on the Tools pane
 - 3. Click **Distribute** in the bottom right of the window

You may be prompted to save your form prior to distributing

- 4. Select "Email"
- 5. Click on **Continue**
- 6. Select "Send it using Adobe Acrobat"
- 7. Click on Next

	Prepare Form	
	Distribute	
Distribut	te Form >	<
How	v would you like to distribute the form?	
۲	Email Distribute, collect data using Email and Adobe Acrobat DC	
0	Internal Server Distribute, collect data using SharePoint or Network Folder	
	Continue Cancel	
	Distribute Form	
	How do you want to distribute your form?	
	Send using Adobe Acrobat DC	
	Save a local copy and manually send it later	

ivery Met	hod: Manually collect responses in my email inbox
То	Contraction (Million and and Anna
ject:	Please complete the form Adobe Word Form practice version 1_distr
ssage:	C:\Users\ Adobe Forms\Adobe Wo Rese
	ed to complete the form "Adobe Word Form practice version 1_distribut crobat or Adobe Reader to fill in this form.
	achment to open the form in Acrobat or Adobe Reader. When you are fir turn your data to the form author.

- 8. Enter the recipients addresses
- 9. Ensure the box "Collect name and email from recipients to provide optimal tracking" is checked
- 10. Click on Send



Forms > Distributed > Adobe Word Form practice version 1_responses

Response File Location:	C:\Users' Adobe Forms\Adobe Word I practice version 1_responses.pdf (Edit file location)
Distributed On:	28/03/2014 3:02:44 PM using email attachment
ecipients Responded (New):	0.0
ecipients Not Responded:	1
otal Recipients:	

To	Fri 28/03/2014 3:03 PM David Miles Please complete the form Adobe Word For
Message	Adobe Word Form practice version 1_distributed.pdf
	e fill out the following form. When finished Submit Form to return the completed form.
📑 High	nlight Existing Fields
Sign Docume Sign As: Pesswordt	David <
Da	avid utawi bit 2014/03.28 11:49:32 +1000
Lock De	ocument After Signing
: Adob	e Word Forms distributed signed odf

Tracker dialogue box opens when form has been sent successfully. It also allows the sender to see if recipients have responded to a form

11. Close **Tracker** box

2) Respond to a form request

A Recipient will receive an email with the form as an attachment.

1. Go to email inbox

2. Open email attachment

Recipients open the form with instructions to complete the form and use the submit button

When distributed, Acrobat scans the form and if no submit button is found a submit button appears at the top right of the form

3. Complete All form fields

Complete the signature field last as adding it can make the document read-only. If a required field is empty you will be locked out and unable to submit or make any other changes

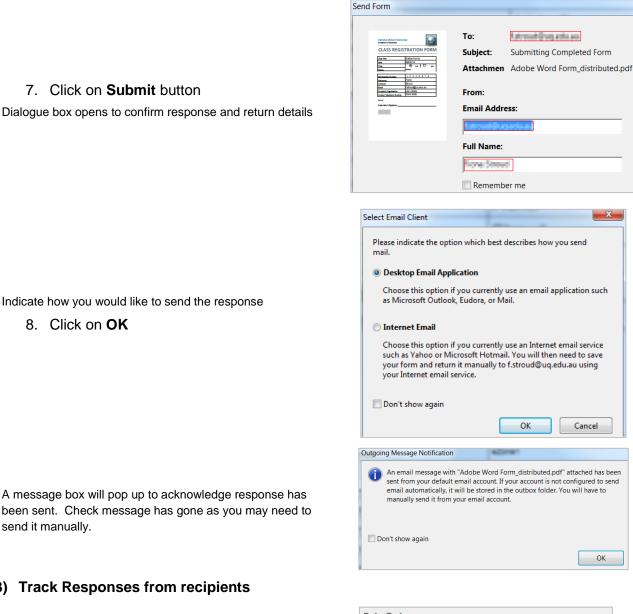
- 4. Add Digital Signature
 - Click Signature field
 - Select Signature at Sign As
 - Enter password
 - Click on Sign
- 5. Save file as Adobe Word Form_Distributed_Signed.pdf
- 6. Click on Save

File

Save as type

Adobe PDF Files (*.pdf)





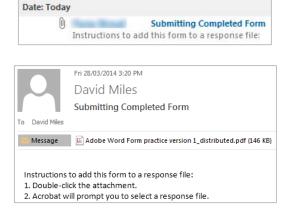
7. Click on Submit button

Indicate how you would like to send the response 8. Click on OK

A message box will pop up to acknowledge response has been sent. Check message has gone as you may need to send it manually.

3) Track Responses from recipients

- 1. Go to email inbox
- 2. Open email and attachment





3. Choose a response file

Adobe should find the original file if you are the one who sent it out originally

dd Completed Form to Response File		×
This file is a completed form and will Add to an Existing Response File	be added to a resp	onse file.
\Adobe Word Form practice version 1	_responses.pdf 🔻	Browse
Create a New Response File		
		Browse
Help	ОК	Cancel

A

7

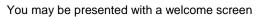
Update: Check for new responses

Welcome to your form response file

Filter: Show only those responses that match your criteria

Archive: Move responses into a new archive resporte file

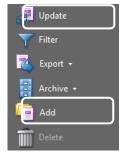
Add: Add new responses to the response file

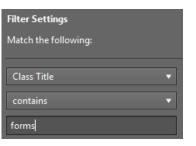


4. Click on Get Started



Export: Create a spreadsheet file that you can open in another application





Adobe Word Forms_responses.pdf More details available at <u>Tracker</u>

Responses are shown in a table style layout.

Response file gives several options for managing responses

Update can only be used on server based forms Add is used for email based forms

4) View and manipulate responses

- 1. Click on Filter
- 2. Select class title field
- 3. Enter "forms"
- 4. Click on Clear All
- 5. Click on Done
- 6. Click **Tracker** link

The tracker will allow you to view other details from responses and contact recipients who haven't yet responded.

7. Close Tracker Dialogue box

Exercise 14.



- 1. Click on Export in responses file
- 2. Select Export all ...

CSV format is default and can be easily read by Microsoft Excel

- 3. Choose destination
- 4. Click Save

A message appears to indicate success

5. Press CTRL +W to close response file

You may be prompted to save responses.pdf

If you accidentally try to add a response more than once a message will display.

Export form results for analysis

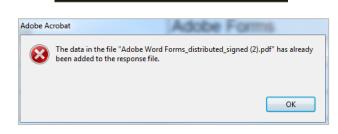
THE UNIVERSITY

OF OUEENSLAND

AUSTRALIA

	Export -	
	Export selected	
File name:	obe Word Form practice version 1_responses.csv 💌	
Save as type:	CSV (Comma delimited) (*.csv)	

4 response(s) successfully exported



Reviewing PDF's



Reviewing PDF documents

Exercise 15.

- 1) Send invite for review
 - 1. Open AdobeReviewFile.pdf
 - 2. Open the Tools Panel
 - 3. Click Send for Comments
 - 4. Select Send for Comments by Email

	<u>F</u> ile	<u>E</u> dit	<u>V</u> iew	<u>W</u> indo	
	Но	ome	То	ols	ļ
	Sen			nents	
		Ad			<u> </u>
(B)	Send	for C	omme	nts by	Email
Identity Setup					×
Please enter yo participants w				her review	
Identity Login Na	ame: uqli	gaite			
_	ame: Lui				_
1	ritle: Mr				_
Comp	any: UQ	!			_
Departm					_
	_	e@mine.co	m		_
		_			
			Complet	e	Cancel
Get	ting Star	ted: Initia	iting an Em	ail-Based R	eview
Ado		at DC lets	you send P	DF files by	email for
- F	Recipients	of the file	e are told h	ow to reviev	v it and h
- /	Anyone w	ith Adobe	Acrobat 6	or Adobe R	eader 7, o
Spe	cify a PDF	file to Se	nd by Emai	I for Review	:
Ad	obeRevie	wFile.pdf			

- 5. Fill out details before clicking on **Complete**
- 6. Click Next



Invite Reviewers 7. Enter email addresses of recipient for Enter an email address for each person whom you would review mickey.mouse@disney.com Address Book 8. Click on Next A sample review email is displayed 9. Click on Send Invitation Cancel < Previo Send 2) Respond to a review request A Recipient will receive an email with the PDF file as an attachment. Please join the review of AdobeReviewFile.pdf 1. Go to email inbox **Fiona Stroud** Please join the review of AdobeReviewFile.pdf 2. Open email message and attachment University Of Queensland Library AdobeReviewFile.pdf (409 KB) Message Adobe Acrobat A message box may display. You have already saved comments for this review in another file. You can use 3. Click on OK the Review Tracker to locate that file. Click Merge Comments to merge all of the comments you just The review document will open and a message banner will display to click Merge comments after editing received into the tracked PDF file you sent for email-based review. <u>/</u> <u>T</u> Тө 푸 Ξο Τ_ω Τ_ά Т Т 4. Open Comments panel പ്പം 5. Use Annotations to add comments Merge Comments 6. Click on Merge Comments in banner Merge Comments onto Master PDF



ОК

Any comments that were in the file have been successfully placed on AdobeReviewFileMerged.pdf.

Adobe Acrobat

Do not show this message again

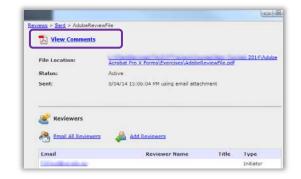
A message box will confirm successful merge

- 3) Track reviewers
 - 1. Open AdobeReviewFile.pdf
 - 2. Open the Tools Panel
 - 3. Click Send for Comments
 - 4. Select Track Comments

<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>W</u> indc
Home Tools
Send for Comments
Add 🔻
Track Comments
🚔 Tracker
Latest Updates
E eviews
AdobeReviewFile
Lined ⊡ ∰ Forms
Distributed
Received

Tracker window opens with details of each reviewer

- 5. Click on AdobeReviewFile under the Sent Reviews
- 6. Click on **View Comments** to see merged comments in PDF file





- 7. Click on Options button
- 8. Select Create Comment Summary

^	Search Comments	
	A z ▼ V ▼ E ▼ 1 Comment	
Expand All Collapse All		
Print with Comment Summary		
Creat	e Comment Summary	

Create Comment Summary
Choose a Layout
 Document and comments with connector lines on separate pages Document and comments with connector lines on single pages Comments only Document and comments with sequence numbers on separate pages
Paper Size: Letter Sort comments by: Page
Font Size: 🔘 Small 💿 Medium 💿 Large
Include: O All comments Only the comments currently showing
Pages containing no comments
Pages 1 to 2
Help Create Comment Summary Cancel
Summary of Comments on AdobeReviewFileMerged.pdf
Page: 1
Number: 1 Author: uqfstrou Subject: Polygon Date: 8/04/14 15:39:46 PM
Number: 2 Author: uqfstrou Subject: Polygon Date: 8/04/14 15:23:11 PM
Number: 3 Author: ugfstrou Subject: Confidential Date: 8/04/14 15:40:54 PM
Number: 4 Author: ugfstrou Subject: Oval Date: 8/04/14 16:03:29 PM
Mumber: S Author. uqfstrou Subject. Line Date: 8/04/14 16:02:56 PM
Number: 6 Author: ugfstrou Subject: Highlight Date: 8/04/14 15:39:53 PM
Number: 7 Author: ugfstrou Subject: Inserted Text Date: 8/04/14 15:2236 PM Investors in Education
Invasion in Education III Number: 8 Author: uqfstrou Subject: Highlight Date: 8/04/24 15:23:54 PM
Number: 9 Author: ugfstrou Subject: Underline Date: 8/04/14 15:22:41 PM
Number: 10 Author: ugfstrou Subject: Inserted Text Date: 8/04/14 15:40:10 PM originally
Number: 11 Author: uqfstrou Subject: Polygon Date: 8/04/14 16:02:49 PM

9. Click on Create Content Summary

The document summary will be created for printing or saving
