

Chapter 1

Getting to Know Adobe Acrobat

To start off this large book on Adobe Acrobat, let's first take a look at what Acrobat is and what PDF is, and let's try to get a grasp on some of the many options you have for working with PDF files in Acrobat.

What Is Adobe Acrobat?

Assuming you know little about Adobe Acrobat, I start with a brief description of what Acrobat is and what it is not. As I explain to people who ask about the product, I usually define it as the most misunderstood application available today. Most of us are familiar with the Adobe Reader software, which is a product from Adobe Systems Incorporated that you can download free from the Adobe Web site (www.adobe.com/acrobat/readermain.html). You can also acquire the Adobe Reader from all the installation CD-ROMs for other Adobe software. You can even acquire Adobe Reader from other sources, as long as the Adobe licensing requirements are distributed with the installer program. The Adobe Reader, however, is *not* Adobe Acrobat. Adobe Reader is a component of a much larger product family that has evolved through several iterations over more than a decade.

You're probably a little more sophisticated and realize there is a major difference between these applications, and you may wonder why I even spend any time discussing the difference between Acrobat and Adobe Reader. Unfortunately, many people still believe that Adobe Acrobat is the free Adobe Reader program.

To add a little more confusion, Adobe continues to market several Acrobat products in the Acrobat family. While Adobe Reader remains a free download from Adobe Systems, there are three additional commercial viewers —

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About Adobe Acrobat

Understanding PDF

Understanding PDF standards

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Looking at the Acrobat workplace

About Preferences

Acrobat Standard on Windows only), Acrobat Pro (on Windows and Macintosh), and Acrobat Pro Extended (includes functionality of the former Acrobat 3D and on Windows only). With the release of Acrobat 9, Acrobat Standard on Windows has been improved and offers many new features formerly reserved for the Acrobat Pro product. As I talk about Adobe Acrobat in this chapter and throughout the book, I'm referring to Acrobat Pro for both Windows and Macintosh, Acrobat Pro Extended for Windows, and Acrobat Standard for Windows users only. Where the programs differ in features, I point them out. I also mention when a feature is only available in Acrobat Pro or Acrobat Pro Extended.

NOTE

There are distinctions between the Acrobat Standard product (Windows) and the Acrobat Pro and Acrobat Pro Extended (Windows) products in terms of tools, commands, and features. Most editing tasks can be handled in all viewers; however, Acrobat Pro does provide more editing features than Acrobat Standard, and Acrobat Pro Extended provides more features than Acrobat Pro. Throughout this book I delineate the differences and point out when a feature is unique to a given viewer.

Adobe Acrobat (Standard, Pro, or Pro Extended) in version 9 is the upgrade from Adobe Acrobat 8 (Standard, Professional, and/or Acrobat 3D) and all viewers are the subject of the remaining chapters of this book. Acrobat is the authoring application that provides you tools and commands for a host of features outlined in the following chapters. If you haven't yet purchased a copy of Acrobat, either the Standard version (Windows only), the Pro version (Windows and Macintosh), or the Pro Extended version (Windows), you might want to look over Chapter 2 and observe some of the comparisons between the viewers. If fewer tools and features suit your purpose, you might find the Standard version satisfactory — but remember, Acrobat Standard is available only on Windows in versions 8 and 9. Although some of the features differ between the viewers, they both provide many features for editing, enhancing, printing, and working with PDF documents.

NOTE

For the purposes of clarity, henceforth I'll refer to Acrobat when features are common to all viewers. I'll make specific mention of one of the Acrobat products when a particular feature is unique to a given viewer. For a quick comparison of the viewers and related features, be sure to look over Chapter 2.

Acrobat is an authoring application, but it has one little feature that distinguishes it from almost any other authoring program. Rather than starting from scratch and creating a new document in Acrobat, your workflow usually involves converting a document, created in just about any program, to a Portable Document Format (PDF) file. Once converted to PDF you use Acrobat to edit and refine the document, add bells and whistles and interactivity, or prepare it for professional printing. In addition to the Acrobat program, Acrobat Pro ships with companion programs such as Adobe Acrobat Distiller, Adobe Acrobat Catalog, and Adobe LiveCycle Designer (Windows only). Acrobat Professional Extended ships with all the Acrobat Pro components and Adobe Presenter and Adobe 3D Reveiwer, Acrobat Standard ships only with Acrobat Distiller. These companion products are used to convert PostScript files to PDF, create search indexes, and author XML-based forms.

CROSS-REF For information related to Acrobat Distiller see Chapter 10. For more information on Acrobat Catalog, see Chapter 6. For more information related to LiveCycle Designer, see Chapter 35.

Acrobat solutions are greatly extended with other supporting programs from Adobe Systems and many different third-party vendors. If Acrobat can't do the job, chances are you can find a plug-in or companion program to handle all you want to do with a PDF file.

CROSS-REF For information related to Acrobat plug-ins and companion products see Chapter 2.

What Is PDF?

PDF, short for *Portable Document Format*, was developed by Adobe Systems as a unique format to be viewed through Acrobat viewers. As the name implies, it is portable, which means the file you create on one computer can be viewed with an Acrobat viewer on other computers, handheld devices, and on other platforms. For example, you can create a page layout on a Macintosh computer and convert it to a PDF file. After the conversion, this PDF document can be viewed on a Linux or Windows machine.

Multiplatform compliance (to enable the exchange of files across different computers, for example) is one of the great values of PDF documents.

So what's special about PDF and its multiplatform compliance? It's not so much an issue of viewing a page on one computer created from another computer that is impressive about PDF. After all, such popular programs as Microsoft Excel, Microsoft Word, Adobe Photoshop, Adobe InDesign, Adobe FrameMaker, and Adobe Illustrator all have counterparts for multiplatform usage. You can create a layout on one computer system and view the file on another system with the same software installed. For example, if you have Adobe InDesign installed on a Macintosh computer and you create an InDesign document, that same file can be viewed on a PC with InDesign running under Windows.

In a perfect world, you may think the capability to view documents across platforms is not so special. Document viewing, however, is secondary to document integrity. The preservation of the contents of a page is what makes the PDF so extraordinary. To illustrate, suppose you have an InDesign document created in Windows using fonts generic to Windows applications. After it's converted to PDF, the document, complete with graphics and fonts intact, can be displayed and printed on other computer platforms. And the other computer platforms don't need the fonts, graphics, or the original authoring application to print the file with complete integrity.

This level of document integrity can come in handy in business environments, where software purchases often reach quantum costs. PDF documents eliminate the need to install all applications used within a particular company on all the computers in that company. For example, art department employees can use a layout application to create display ads and then convert them to PDF so that other departments can use the free Adobe Reader software to view and print those ads for approval.

The benefits of PDF viewing were initially recognized by workgroups in local office environments for electronic paper exchanges. Today users have much more opportunity for global exchange of documents in many different ways. As you look at Acrobat and discover some of the features available for document comment and markup, comparing documents, support for layered files (which adds much more functionality to Adobe Reader), and preparing PDFs for screen readers, you'll see how Acrobat and the PDF have evolved with new technologies.

CROSS-REF The term “screen reader” is used extensively throughout this book. When you see a reference to “screen reader,” I’m referring to either a hardware device or special software (JAWS, Kurzweil, and so on) used to convert visual information to audio format. For more information on screen readers and making documents accessible to the readers, see Chapter 25.

Document repurposing

The computer revolution has left extraordinary volumes of data that were originally designed to be printed on paper on computer systems. Going all the way back to UNIVAC, the number crunching was handled by the computer and the expression was the printed piece. Today, forms of expression have evolved to many different media. No longer do people want to confine themselves to printed material. Now, in addition to publishing information on paper, we use CD-ROMs, the Internet, file exchanges, and meeting sessions via the Internet between computers. Sometimes we use motion video, television, and satellite broadcasts. As high-speed access evolves, we'll see much larger bandwidths, so real-time communication will eventually become commonplace.

Technology will advance, bringing many improvements to bandwidth, performance, and speed. To enable the public to access the mountains of digital data held on computer systems in a true information superhighway world, files need to be converted to a common format. A common file format would also enable new documents to be more easily *repurposed*, to exploit the many forms of communication that we use today and expect to use tomorrow.

Acrobat Pro has many tools for helping users repurpose documents. Tools for repairing problem files, downsizing file sizes, porting files to a range of different devices, and eliminating unnecessary data are part of the many features found in Acrobat Pro. In addition, the PDF/A format introduced in Acrobat 8 is designed specifically for archiving documents. A standards committee has developed this format so documents viewed on computer systems 100 years from now will be compatible with future operating systems.

PDF and Adobe PostScript

The de facto standard for nearly all printing in the graphics industry has been Adobe PostScript. While PostScript is still the dominant printing language, this will slowly change because Adobe has announced in 2006 support for PDF as the new print standard.

Okay, so how does PostScript relate to PDF? In the initial release of Acrobat, all PDF conversion began with a file that was created as a PostScript file. Users selected the Print command in an authoring program and printed the file to disk — thus creating a PostScript file. This file was then opened in the Acrobat Distiller program and Distiller converted the PostScript to a PDF.

Distiller is still a part of Acrobat. In some cases, creating a PDF from a PostScript file rather than through any of the many other means available may be preferable. It could be that you have a problem with exporting to PDF from a program, such as fonts not appearing embedded, or you may need to create a PDF for a special purpose such as printing and prepress. In such circumstances using Acrobat Distiller may be your best solution for generating a PDF document to properly suit the purpose.

CROSS-REF For information related to printing PostScript files and using Acrobat Distiller see Chapter 10.

Printing to PostScript and opening PostScript files in Distiller is used much less today because now so many programs support PDF creation through one-button clicks or using the Save As command. However, many of these one-button clicks still use the Distiller application in the background to create the PDF file. You may not see Distiller launched when PDFs are created in the background, but the program is working away to convert your authoring application document to a PDF file.

PostScript can be a problem solver for you, and you may have an occasional need to use it even if your workflow does not require its use all the time. The more you know about PostScript and Acrobat Distiller, the more often you might be able to rescue problem files that don't seem to properly convert to PDF.

PDF versions

Acrobat is now in version 9. The version number indicates the number of releases of the product. PDF is a file format and with it you'll also find a version number — that is, up until version 9 of Acrobat. The PDF version in versions prior to 9 related to the specifications of the file format; for the end user it's usually not so important to understand all the specifications as much as it is to know what it does for you or what you can expect from it. If you create PDF documents for users of older Acrobat viewers and use the newer PDF format, your users may not be able to view your PDF files. Conversely, creating PDF files with the older version might prohibit you from using some newer features in the recent release.

PDF versions are typically referred to as Acrobat Compatibility. A PDF version 1.7 file, for example, is an Acrobat 8-compatible file. To understand how the PDF version relates to the Acrobat version, simply add the digits of the PDF version together. For example, PDF version 1.4 is Acrobat 5 compatible ($1 + 4 = 5$). PDF version 1.5 is Acrobat 6 compatible, and so on.

Now in version 9 however, PDF has lost its version number — the reason being, Adobe no longer owns the PDF specification. PDF has become an adopted standard by the International Organization for Standardization (ISO). Since the ISO committee sets the standard, it's taken out of the hands of Adobe and no longer carries a version number.

Each release of Acrobat provides support for additional features in PDF documents. It's not as important to know all the features enabled by one version as it is to know which Acrobat compatibility you need to use. For example, to optimize a PDF file for printing, you may need to use PDF version 1.3 or Acrobat 4 compatibility. Or, if you want to embed movie files in a PDF, then you need to use an Acrobat 6-compatible file. Or, you may want to add password security to a PDF that requires a newer Acrobat viewer to open a file using a password.

Whereas you previously may have thought of PDF version files, you now need to think in terms of Acrobat version compatibility. The PDF specification is handled by ISO, but the Acrobat compatibility is handled by Adobe Systems. ISO 32000 is the ISO specification for the current PDF version.

Understanding PDF Standards

PDF has been adopted as a standard file format in many industries, including engineering, legal, manufacturing, and prepress and printing. Even the United States Federal Government has embraced PDF as a standard file format.

So what are *standards*? Without regulation and approved standards, the computer industry would be chaotic. Fortunately, the International Organization for Standardization (ISO) develops and approves standards for the technical industry. This international committee, an entity apart from Adobe Systems, has approved and developed substandards of the PDF format.

The PDF standards available now include the following:

- **PDF/X.** This standard is a subset of the PDF format used in the printing industry. PDFs meeting PDF/X compliance are typically reliable and, theoretically, can be accurately printed on almost any kind of PostScript device.
- **PDF/E.** This standard is a subset of the PDF format designed for engineers to insure that industrial designs and drawings comply with a PDF standard.
- **PDF/A.** This standard is a subset of the PDF format used for archiving documents. The standards committee wants to insure that the files you create today and save as PDF can be viewed by computers many years in the future. To do so, the PDFs you create for archival purposes can be saved as PDF/A documents.

- **PDF/UA.** Although, as of this writing, this subset of the PDF format is in an early draft stage, you may be hearing more about it in the near future — about one to two years from this writing. The goal of this proposed new standard is to provide universal access (UA) to all users including those persons working with assistive devices (see Chapter 25 for more on PDFs and assistive devices). The proposed new format is in the hands of the AIIMS Standards Board Committee that also proposed the PDF/X and PDF/A standards and submitted them to the ISO. People interested in participating on the committee can find more information at www.aiim.org/standards.asp?ID=27861.

Acrobat Environment

Acrobat provides you with features such as menu commands, toolbars, and palettes to accomplish work for whatever goal you hope to achieve with PDF documents. When you launch the program you see many of these features in the Acrobat window. Just so you know what is being referred to when I discuss accessing a feature in Acrobat, take a look at Figure 1.1 to understand the names used to describe the various areas of the new Acrobat workplace.

- A **Title bar.** By default, the name of the file you open appears in the title bar. The title appearing in the title bar can change according to an option for displaying the Document Title in the Initial View properties.

CROSS-REF For information related to Initial View and displaying Document Titles, see Chapter 5.

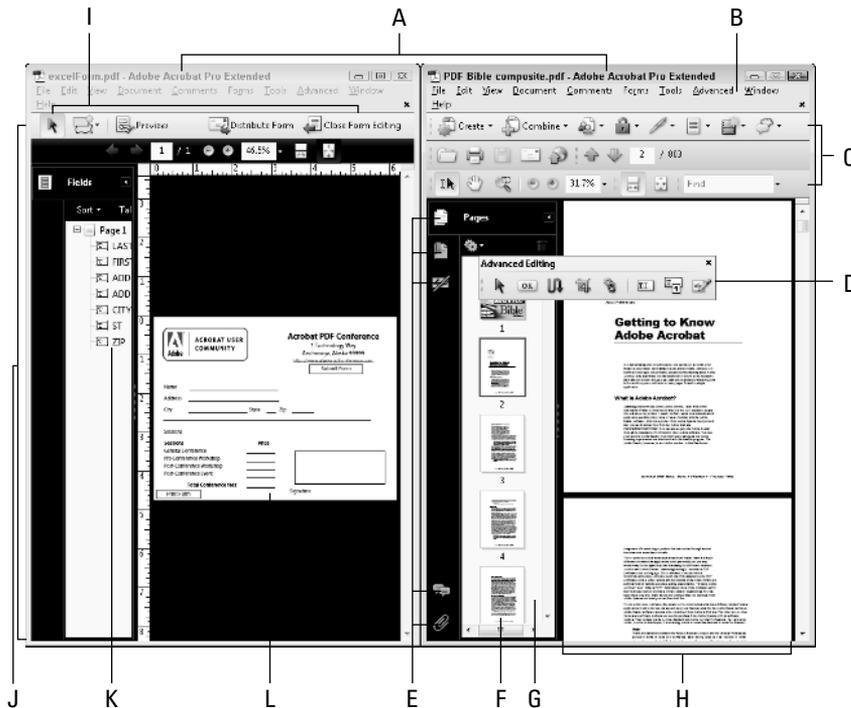
Note that the left side of Figure 1.1 shows a PDF document opened in Form Edit mode while the right side of the figure is a PDF file opened in Viewer mode. See item J for more on Form Edit mode.

- B **Menu bar.** The menu bar (Viewer mode) contains all the top-level menu commands. Many of these menu choices are also available from various actions associated with links and form fields when you choose the Execute a menu item command in the Actions Properties dialog box for links, form fields, and other features that permit associating an action with a command. When viewing files showing toolbars and menus for each open document, the Acrobat window appears as shown in Figure 1.1 on the right side of the figure. This view can be toggled off in a preference setting.

CROSS-REF For information related to link actions and the Execute a menu item command action type, see Chapter 22. For more information on actions with form fields, see Part VI. For making preference choices for viewing PDFs, see “Customizing the Acrobat workplace” later in this chapter.

FIGURE 1.1

The Acrobat Pro Extended workplace contains menus, toolbars, and palettes.



- C Toolbars.** A number of individual toolbars are nested below the menu bar in the Toolbar Well. When preferences are set to view toolbars attached to each open document, you'll see multiple sets of toolbars. Toolbars are marked with a vertical separator bar at the left side of the toolbar. This bar can be selected and dragged to move it out of the Toolbar Well.

CROSS-REF

For information related to working with toolbars, see the “Tools, task buttons and toolbars” section later in this chapter.

- D Floating toolbar.** Toolbars can be opened by accessing the More Tools window and selecting a toolbar name. When a toolbar is opened, it appears as a floating toolbar. Floating toolbars can be *docked* in the Toolbar Well.
- E Navigation pane buttons.** Individual panel buttons appear on the left side of the Navigation pane. Click one of these buttons to open the Navigation pane where you find menu commands from an Options pull-down menu or a context menu opened in the Navigation pane.

- F Pages panel.** When you open the Pages panel, you'll see thumbnail images of each page in your document and you'll find many page-editing features available to you from the Pages panel pull-down menu.

CROSS-REF For information related to using the many options available in the Pages panel, see Chapter 16.

CROSS-REF To learn how to use the Comments panel options, see Chapter 20.

- G Navigation pane.** The Navigation pane can be expanded or collapsed. The view in Figure 1.1 is an expanded view where the Pages panel is the active panel. To open the Navigation pane you can click a panel button to display the respective information associated with that panel in the expanded panel window. Clicking again on the panel collapses the view. You can also use the keyboard shortcut F4 to expand and collapse the Navigation pane.
- H Document pane.** The Document pane is the container for PDF files you see in Acrobat. When no file is open, the Document pane is empty. When you open a PDF document, the document appears in the Document pane.
- I Toolbar.** Tools that are used in Form Editing Mode.
- J Form Editing Mode.** From a menu command in the Forms menu, you can open the Form Editing Mode. Form Editing Mode is a new user interface introduced with Acrobat 9 and is specifically designed for creating Acrobat PDF forms. This mode is available in Acrobat Standard (Windows), Acrobat Pro (Windows and Macintosh), and Acrobat Pro Extended (Windows). To exit Forms Edit mode and return to the Viewer mode shown on the right side of Figure 1.1, click the Close Form Editing button.
- K Fields panel.** The Fields panel is used for editing fields and only appears when you enter Form Editing Mode.
- L PDF Form.** A form appears in the Form Editing Mode Document pane when editing a form in Form Editing Mode.

CROSS-REF For more information on Form Editing Mode and creating PDF forms, see Chapter 34.

For more detail on specific menu commands, tools, and palettes, see the related chapters to discover the different options available to you. All of the items discussed here are explained in more depth in subsequent chapters.

Menus

As with any program operating on a computer system that supports a Windows type of environment, you'll notice menu commands at the top level of the Acrobat window. Users of previous versions will notice that Acrobat 9 features a editing mode that contains tools specific to creating PDF forms. If at first glance you don't see an option you used in Acrobat 8, poke around the menus.

None of the Acrobat 8 features have been eliminated; they may just be in a different place or referred to by a different name.

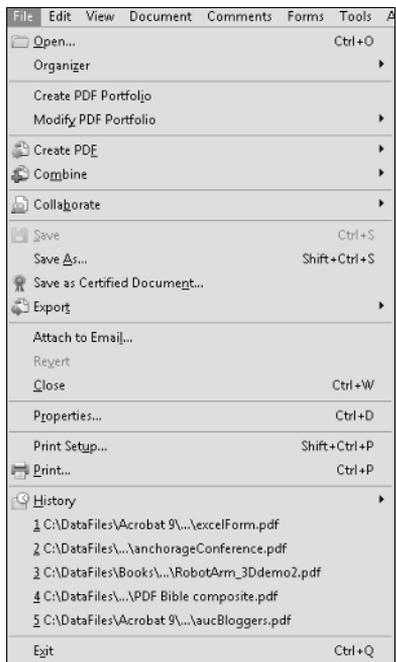
File menu

The File menu is where you open and close documents, create PDF files, import and export certain data, access print commands, and find some other nifty new additions in Acrobat such as the new Acrobat 9 PDF Portfolios and collaboration features. The Mac and Windows operating systems display recent files in different menus. On the Mac in OS X you'll find recently viewed documents by choosing File ⇨ Open Recent File. This command opens a submenu where you can access recent documents. On Windows, a list of the recently viewed documents is located at the bottom of the File menu, as shown in Figure 1.2.

CROSS-REF Note that the Start Meeting command that appeared in Acrobat 8 has been removed in Acrobat 9. A new Share Screen command is contained in the Collaborate submenu as I explain in Chapter 29.

FIGURE 1.2

Recently opened files in Windows appear at the bottom of the File menu. Macintosh users can display a list of recently viewed files by choosing File ⇨ Open Recent File.

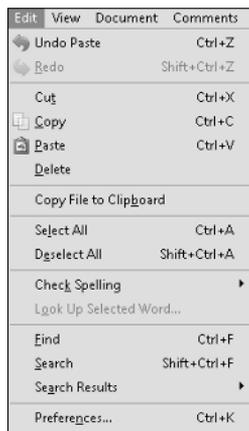


Edit menu

As shown in Figure 1.3, the traditional Cut, Copy, and Paste commands are located in the Edit menu along with other familiar commands from Acrobat 8. There are no changes to the Edit menu from Acrobat 8.

FIGURE 1.3

The Edit menu contains the same commands found in Acrobat 7.



View menu

The View menu (see Figure 1.4) contains all the commands you'll use for viewing PDF documents. An addition to the View menu is the Cursor Coordinates command. This command displays a tiny window showing the coordinates of the cursor as you move it around the Document pane. The display units are controlled by opening the Preferences (Ctrl+~~⌘~~+K) and changing the Units preferences.

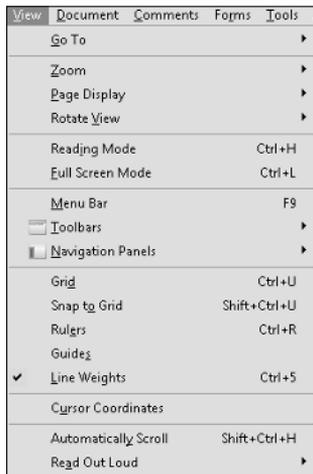
Document menu

The Document menu (see Figure 1.5) contains a collection of commands specific to document handling. Options in the Document menu have a few changes in Acrobat 9 compared to the options in Acrobat 8. Notice a new command — Split Document. This new command now enables you to split PDF files by number of pages, file size, and top-level bookmarks. Although the Paper Capture command hasn't changed submenu commands, the new Clear Scan features in Acrobat 9 greatly improve scanning and OCR conversion. Notice the Compare Documents command, which was formerly in the Advanced menu in earlier Acrobat viewers, has now been moved to the Document menu.

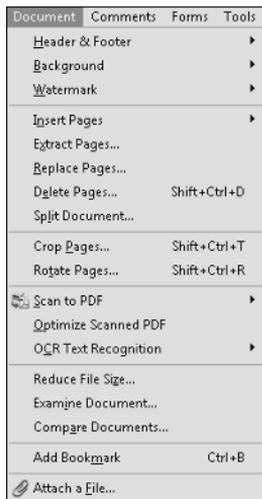
CROSS-REF For information related to splitting documents see Chapter 16. For more information on scanning documents, see Chapter 17. For more information on comparing documents, see Chapter 20.

FIGURE 1.4

The View menu contains commands for viewing PDF documents and navigating through pages and different PDF files.

**FIGURE 1.5**

The Document menu contains commands for editing documents.



Comments menu

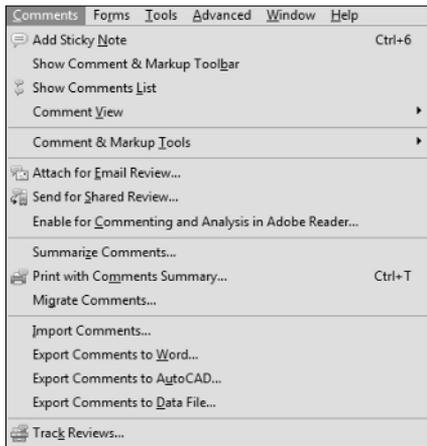
There's not so much change you'll find in the Comments menu in Acrobat 9, but selecting several different commands opens up windows and dialog boxes with some very impressive new features in Acrobat 9 (see Figure 1.6). For example, sending files for shared reviews opens a new wizard where you can choose to share reviews on Acrobat.com.

CROSS-REF

For details on working with Acrobat.com look over Chapters 4, 21, and 29.

FIGURE 1.6

The Comments menu.



Forms menu

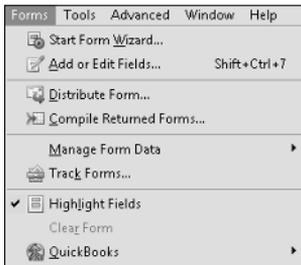
Perhaps the biggest change you'll find in Acrobat 9 is the many new features related to creating Acrobat PDF forms (see Figure 1.7). A huge departure from earlier Acrobat features is that all the form-editing options that were reserved for Acrobat Pro viewers are now included in Acrobat Standard on Windows. In addition, the way you create forms has greatly changed in Acrobat 9. Notice the two new menu commands at the top of the menu. Choosing either command opens a new user interface called Form Editing Mode where PDF forms are authored. In addition, you'll find a command that enables you to integrate PDF form data with the QuickBooks accounting software.

NEW FEATURE

Form Editing Mode is a new feature in Acrobat 9 where all your form authoring is performed in a new user interface.

FIGURE 1.7

The Forms menu contains commands specifically for working with forms and provides a gateway to open the Form Editing Mode.

**CROSS-REF**

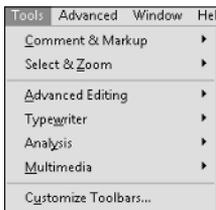
For working with Acrobat PDF forms, see Chapters 33 and 34. For understanding more about Adobe Designer and XML forms (Windows only), see Chapter 35.

Tools menu

Several changes appear in the Tools menu shown in Figure 1.8. Notice that the Forms command that opened the Forms toolbar in Acrobat 8 has been removed in Acrobat 9. There is no Forms toolbar in Acrobat 9 since forms editing takes place in Forms Edit mode where you'll find access to all the forms tools. The Measuring toolbar and the Object tool formerly found in the Acrobat 8 Tools menu have been eliminated and replaced by the Analysis toolbar. In Acrobat 9 you'll find the new Multimedia toolbar accessed by selecting Multimedia in the Tools menu.

FIGURE 1.8

The Tools menu contains a collection of tools accessed from submenus. Select a tool group from the menu options to open a submenu.

**CROSS-REF**

For more information on using the Multimedia tools, see Chapters 7 and 23.

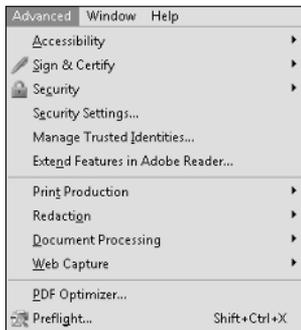
Advanced menu

The Advanced menu (see Figure 1.9) contains a collection of menu commands considered to be advanced Acrobat features. Several of these tools are not available to users of Acrobat Standard such as Batch Processing, the Redaction tools, access to Acrobat Catalog, Print Production,

Document Processing, PDF Optimizer, and Preflight some accessibility options are different in Standard. A few changes have been made in this menu in Acrobat 9. You'll notice a slight rearrangement of the commands with Accessibility now appearing at the top of the menu and the disappearance of the Compare Documents command that has been moved to the Document menu.

FIGURE 1.9

The Advanced menu offers menu commands related to advanced editing features.

**CROSS-REF**

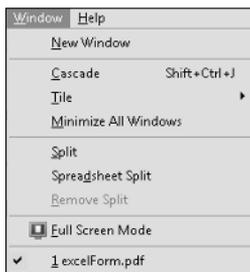
For information related to batch processing, see Chapters 18 and 36 (on the CD-ROM). For information on using Acrobat Catalog, see Chapter 6. For information on using all the security commands see Chapter 26.

Window menu

The Window menu (see Figure 1.10) provides menu commands to assist you in viewing documents. No changes appear in the Window menu in Acrobat 9 compared to earlier viewers.

FIGURE 1.10

The Window menu handles all the window views such as tiling, cascading, and splitting windows.

**CROSS-REF**

For information related to window views and the split window views, see Chapter 5.

Help menu

The traditional help files added to your Acrobat folder at installation are found in the Help menu (see Figure 1.11). Various online help support is also located in this menu. You'll notice the rearrangement of help items in Acrobat 9 and the elimination of the Getting Started menu choice.

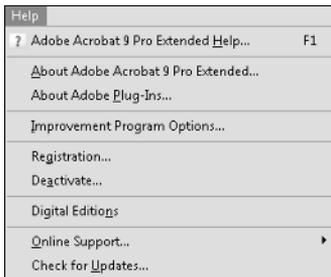
CROSS-REF For information related to Help documents and Help menus, see Chapter 3.

Submenus

An extensive number of submenus appear in menus contained in the top-level menu bar and from many different tools contained in toolbars. Note that on individual toolbars you see a down-pointing arrow. Clicking the arrow opens a menu; some menus contain submenus. A submenu is denoted in Acrobat by a right-pointing arrow on the right side of a given menu command as shown in Figure 1.12. Select a command with one of these arrows adjacent to the command name and a submenu opens. In a few cases, you can find nested submenus where another right-pointing arrow may be visible in a submenu. If you want to access the second submenu, move the cursor to the menu option containing a right-pointing arrow. To make a selection from a submenu command, move the cursor to the desired menu command. When the menu command highlights, click the mouse button to execute the command.

FIGURE 1.11

The Help menu gives you access to Help information on selected topics as well as access to the complete Acrobat Help document.

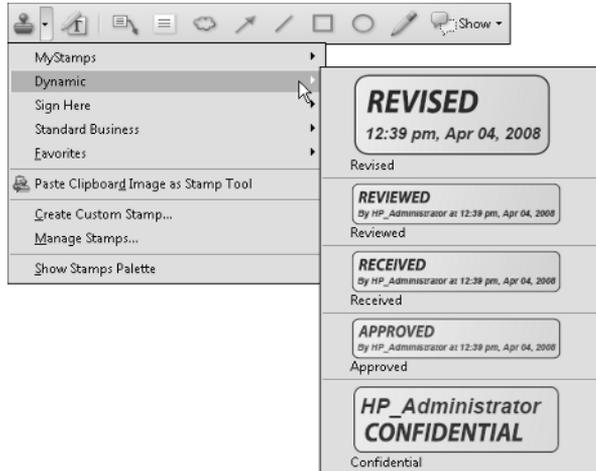


Context menus

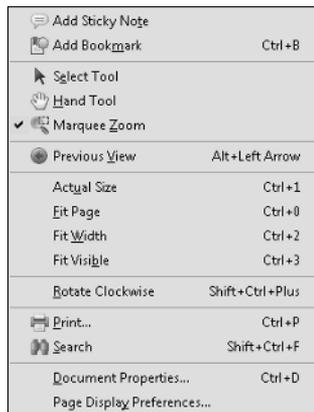
Wherever you are in the Acrobat window — the toolbars, panels, Document pane, or the various editing modes — you can gain quick access to menu items related to your task by opening a context menu. Context menus pop up in an area where you either click the right button on the mouse or use an appropriate key modifier. In Windows, right-click the mouse button to open a context menu. On a Macintosh, when not using a two-button mouse, press the Control key and click the mouse button. Context menu options relate to the particular tool you have selected from a toolbar. Selecting different tools provides you with different menu commands. In Figure 1.13 I opened a context menu with the Marquee Zoom tool selected.

FIGURE 1.12

To access a submenu, move the cursor to the command containing a right-pointing arrow and slide the cursor over to the submenu options. Click the desired command in the submenu to execute the command.

**FIGURE 1.13**

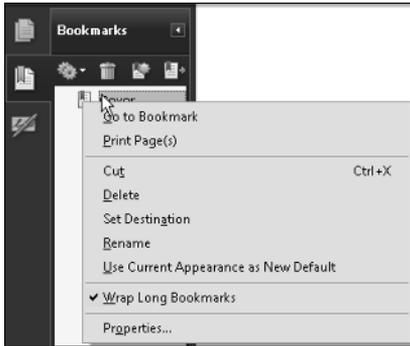
With the Marquee Zoom tool selected, right-clicking (Windows) or Control+clicking (Macintosh) the mouse button opens a context menu. From the menu, scroll the list and select the desired menu command.



If you change tools in a toolbar and open a context menu, the menu options change to reflect choices with that particular tool. Likewise, a context menu opened on a panel offers menu options respective to the panel, as shown in Figure 1.14.

FIGURE 1.14

When a panel is open in the Navigation pane and you open a context menu, the menu options reflect tasks you can perform respective to the panel.

**TIP**

Opening a context menu on one of the icons in the Navigation pane opens a menu where you can add or remove panels from the pane. Additionally, you can hide the Navigation panel icons by opening a context menu in the Navigation pane and select **Hide Navigation Pane Buttons**. To bring back the Navigation Pane Buttons, press **F4** on your keyboard or select **View** ⇨ **Navigation Panels** ⇨ **Show Navigation Pane**.

Context menus are a great benefit during your Acrobat sessions and using them helps you work much faster. Throughout this book I often make references to the different choices you have in selecting a tool or command. In most incidences, you find mention of context menus. Be certain you know how to open a context menu in Acrobat on your computer. For the remainder of this book, I'll mention opening context menus without walking through the steps for how to open the menu.

Keyboard shortcuts

Pressing one or more keys on your keyboard can also open menus and invoke different commands. When you become familiar with keyboard shortcuts that perform the same function as when using a menu or context menu, you'll find yourself favoring this method for making different menu selections or grabbing a tool from a toolbar. Fortunately, you can learn as you work when it comes to memorizing keyboard shortcuts. As I'm certain you know, several shortcut combinations are noted in menu commands. You can learn these shortcuts when you frequently use a particular command. However, the keyboard shortcuts you see in the menu commands are just a fraction of what is available in Acrobat for quick access to commands and tools. For a complete list of all keyboard shortcuts, look over the Acrobat Help document you open by selecting **Help** ⇨ **Adobe Acrobat 9.0 (Standard, Pro, or Pro Extended) Help** or pressing the **F1** key.

NOTE

Pressing a single key to access a tool requires you to have your Preferences set to **accept single keystroke shortcuts**. See the steps for "Setting up the Acrobat environment" later in this chapter for the proper Preferences settings.

Tools, task buttons, and toolbars

Tools are grouped together in separate toolbars in the Toolbar Well below the menu bar. The default view when you launch Acrobat contains several toolbars visible in the Toolbar Well. You can remove various toolbars from the Well, move them around the Acrobat window, close them, and add different toolbars to the Toolbar Well.

In addition to loading and unloading toolbars, you can also add or remove individual tools from any toolbar. Before you learn how to add and remove individual tools, let's first take a look at the Toolbar Well.

The Toolbar Well, where the toolbars are contained, is collapsed and expanded according to the number of toolbars you add to it. When a toolbar is contained within the Toolbar Well, it is said to be *docked*. When a toolbar is dragged away from the Toolbar Well and rests atop the Acrobat window, it is said to be *undocked* and appears as a *floating* toolbar.

Task buttons

One of the many different toolbars in Acrobat is called the Tasks toolbar. This toolbar houses various Task buttons. In Figure 1.15 the tasks toolbar is shown with the label descriptions to describe each tool's purpose. Task buttons differ a little from other tools in that they all support pull-down menus where menu commands related to specific tasks are addressed.

FIGURE 1.15

The Tasks toolbar contains several Task buttons all containing pull-down menus.



The Tasks toolbar features commands for creating PDFs, combining files, working with reviews and online collaboration, securing PDFs, digitally signing PDFs, working with forms, working with multimedia, and working with comments.

Loading and unloading tools

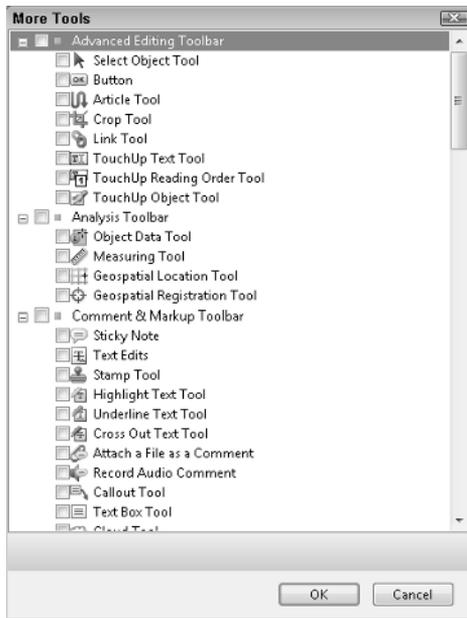
The default tools you see in the Toolbar Well when you first open Acrobat are but a mere fraction of all the tools available to you. Fortunately in Acrobat, a nifty window is available to help you easily manage tools.

It's important to realize that you have toolbars and tools. Tools appear as individual icons contained in a given toolbar. You can choose to show only one tool in a toolbar or all the tools that belong to a given toolbar and anything in between. The tools within toolbars can be added and deleted from the parent toolbar.

If you're familiar with earlier versions of Acrobat and you don't find tools loaded in the various toolbars, your first stop is to open the More Tools menu at the top right corner of your screen. Select More Tools from a context menu opened on the Toolbar Well and the More Tools window opens as shown in Figure 1.16.

FIGURE 1.16

Open the More Tools window to show/hide tools in toolbars.



Place a check mark beside any tool to be shown in a toolbar docked in the Toolbar Well or opened as a floating toolbar. Figure 1.16 shows you a small portion of available tools that appear in a scrollable window.

NOTE

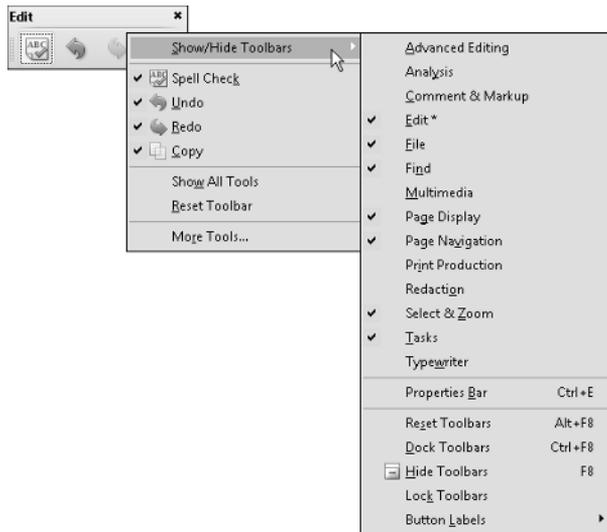
Toolbars themselves can be shown or hidden using the More Tools window. If you remove a check mark adjacent to a toolbar name to hide the toolbar, the toolbar and all the tools are hidden, even if the individual tools are all checked.

Yet another way to add and remove tools to and from toolbars is to simply open a context menu on a toolbar. Right-click (Windows) or Control+click (Macintosh) on a toolbar either docked in the Toolbar Well or as a floating toolbar and a pop-up menu provides options for adding or removing tools to/from that toolbar group.

In Figure 1.17 a context menu is opened on the Edit toolbar. When Show/Hide Tools is selected a submenu displays all toolbars. Select an item unchecked to open the respective toolbar, or select a checked toolbar to remove/hide it. Note that hiding a toolbar is temporary and only hides the toolbar from view in the Toolbar Well.

FIGURE 1.17

Open a context menu on a toolbar and select Show/Hide Toolbars to open a submenu where all toolbars can be opened or temporarily closed.



TIP

If you want all tools within a given toolbar to be shown, select **Show All Tools** in the context menu.

The Show/Hide menu command in the context menu shown in Figure 1.18 provides the same commands you have available in the View ⇄ Toolbars submenu. Either of these menus provides you a quick and easy way to show and hide toolbars.

The last menu item in the context menu shown in Figure 1.18 is used to open the More Tools window where you can add/remove tools among all toolbars.

Default toolbars

When you launch Acrobat for the first time or you set the toolbars to the default view, six different toolbars are docked in the Toolbar Well, including the Tasks toolbar discussed earlier in this section. The remaining default toolbars include:

- **File toolbar.** These tools are used for general document handling. The default File tools activate commands for Open, Save, Print, and Email and Upload. When all the tools are loaded in the File toolbar the Create PDF from web page and Attach a File tools are added to the toolbar. In Figure 1.19 the File toolbar appears with all the File tools in view.

FIGURE 1.18

The File toolbar contains tools for document handling, such as opening PDF documents, saving documents, and printing files.



- **Page Navigation toolbar.** The default tools in the Page Navigation toolbar shown on the left in Figure 1.19 contain tools for moving back and forth between PDF document pages. The numbers indicate what page you are currently viewing out of the total number of pages in the document. When the toolbar is expanded to show all tools as you see in Figure 1.19, the First Page, Previous Page, Next Page, Last Page, Previous View, and Next View tools are shown.

FIGURE 1.19

The Page Navigation toolbar, as the name implies, contains tools for navigating document pages.



- **Page Display toolbar.** The Page Display toolbar is the home of many different tools used for page viewing, but only two of the tools appear in the default toolbar. When you first open Acrobat, you see the Scrolling Pages and One Full Page tool. After expanding the toolbar to show all tools as shown in Figure 1.20, the Single Page Continuous, Single Page, Two-Up, Two-Up Continuous, Full Screen Mode, Rotate Counterclockwise, Rotate Clockwise, and Line Weights tools are shown.

FIGURE 1.20

The Page Display toolbar contains many tools used for page viewing.



- **Select & Zoom toolbar.** The tools in this group are used to select text/images, move the page in the Document pane, and zoom in and out of pages in the Document pane. Figure 1.21 shows the Select tool followed by the Hand tool and then the Dynamic Zoom tool, the Zoom Out, Zoom In, Zoom Value tools, Actual Size, Fit Width, Fit Page, Pan & Zoom Window, Loupe tool, and Snapshot.

FIGURE 1.21

Select & Zoom tools are used to select text/images, move a document around the Document pane, copy selections, and view the document page using a number of different zoom tools.



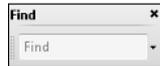
- **Find toolbar.** Of all the default toolbars, the Find toolbar shown in Figure 1.22 is the only one that does not have additional tools that can be added to the toolbar. However, a pull-down menu exists for making choices to refine your search for words in an open PDF document.

CROSS-REF

For more information on searching PDFs, see Chapter 6.

FIGURE 1.22

The Find toolbar is used for searching words in a PDF document.

**Managing default toolbars**

In addition to loading and unloading tools within toolbars, the toolbars can be moved, docked, and undocked from the Toolbar Well. Here's a list of some of the things you can do with the default toolbars and any other toolbars you decide to view:

- **Undocking toolbars.** Toolbars can be relocated from within the Toolbar Well to another area within the Acrobat window. For example, you might find it more convenient to move a toolbar you frequently access during an editing session so it is positioned at the right side of the Document pane. If so, just place the cursor on top of the vertical separator bar adjacent to the first tool in a toolbar and drag it away from the Toolbar Well. This vertical line is the *hot spot* used to select the toolbar instead of a tool in the group. Clicking anywhere else in the toolbar selects a tool.

- Docking toolbars.** To dock a toolbar back in the Toolbar Well once removed, drag the toolbar, again by the vertical separator bar adjacent to the first tool, on top of the Toolbar Well. The toolbar snaps to an available position in the Well. If you drop the toolbar between two other toolbars, the toolbar you relocate back to the Toolbar Well snaps in position between the two docked toolbars.

Toolbars can also be docked vertically on the left and right sides of the Document pane and at the bottom of the Acrobat window below the status bar. For example, if you drag a toolbar to the left of the Navigation pane and release the mouse button, the toolbar snaps to a docking station and the tools display vertically. In Figure 1.23 you can see toolbars docked on the left (A), and right (B), with one floating toolbar (C) in the Document pane.

- Resetting toolbars:** You can position toolbars around the Acrobat window and return them to the default positions with one menu command. This is particularly helpful if multiple users work on a single computer or you frequently change editing tasks that require using different tools during different editing sessions. In many cases it's easier to reset toolbars to the original default view than open tools needed for a specific editing task. To set toolbars to their defaults, open a context menu from any toolbar or in the Toolbar Well by right-clicking (Control+clicking on Macintosh), and select the menu item Reset Toolbars as shown in Figure 1.24. Alternately, you can press Alt/Option+F8.

FIGURE 1.23

Toolbars can be docked on all four sides of the Acrobat window and undocked from the Toolbar Well where they appear as floating toolbars.

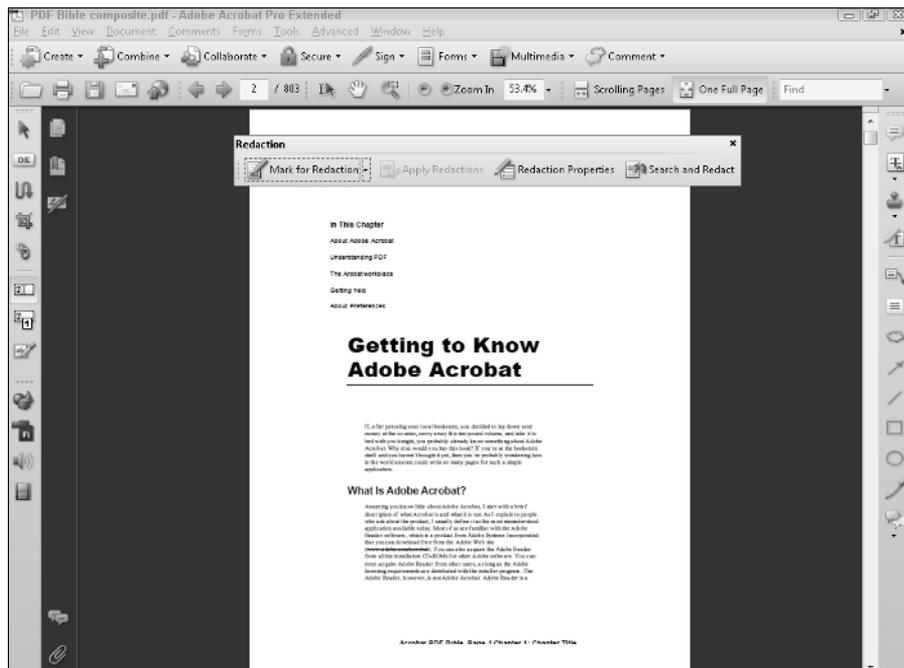
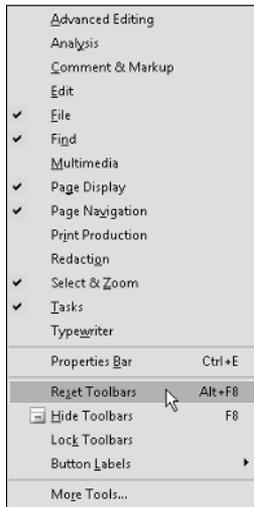


FIGURE 1.24

To return toolbars back to the default view, open a context menu from any toolbar or in the Toolbar Well and select Reset Toolbars.



- **Hiding all toolbars.** Toolbars can be hidden from view to offer you more room when editing a PDF document or browsing the contents of PDFs. To hide the toolbars from view, open a context menu from the Toolbar Well and choose Hide Toolbars. When toolbars are hidden you won't have access to a context menu to get the toolbars back in view. Instead, choose View ⇨ Toolbars ⇨ Show Toolbars to make all toolbars reappear. (Note that using this menu command also hides toolbars.)
- **Hiding a single toolbar.** You can hide a toolbar after it has been undocked from the Toolbar Well. Click the X in the top right corner of the toolbar (Windows) or the small circle on the top left side of the toolbar (Macintosh) to close it, and it disappears from view. From a context menu opened on any toolbar or the Toolbar Well, you can open the toolbar and display it in the Acrobat window again. Toolbars can also be hidden by using the More Tools window, opening a context menu on the Toolbar Well and selecting a toolbar with a check mark to hide it, and selecting toolbars in the View ⇨ Toolbars submenu.
- **Locking toolbars.** The vertical separator bar used to move toolbars disappears when you select Lock Toolbars from a context menu. The toolbars cannot be inadvertently moved after you lock them. To unlock the toolbars, open a context menu and select Lock Toolbars again. The check mark alongside the menu command becomes unchecked and the toolbars are unlocked in the Toolbar Well. If the toolbars are locked and you drag an undocked toolbar on top of the Toolbar Well, it won't dock. You need to first unlock the toolbars before you can redock them. Additionally, you need to unlock toolbars in order to use the Reset Toolbars command in a Toolbar Well context menu to return tools and toolbars back to the default position.

NOTE

You can also lock toolbars that are undocked outside of the Toolbar Well. The separator bar on the toolbar disappears on floating toolbars the same as it does for toolbars docked in the Toolbar Well. However, locking undocked toolbars does not prevent you from moving them around the Acrobat window. You can click and drag the title bar for any undocked toolbar and move it to another location.

- **Setting new toolbar defaults.** If you decide to reposition your toolbars and want to keep them fixed as new defaults, Acrobat can do so for you automatically. Move the toolbars to the desired locations and go about your work. When you quit Acrobat and reopen the program, the toolbar positions remain as you last arranged them. Unfortunately, Acrobat does not have a Save Workspace command like you find in several Adobe Creative Suite applications.

TIP

If you are unfamiliar with many Acrobat tools, you can change the tool labels to show you a more descriptive label for each tool that offers you a hint of what the tool does. To show more descriptive labels, open a context menu on the Acrobat Toolbar Well and choose Show Button Labels ⇨ All Labels. The toolbars expand and show a text description for each tool's name. Keep this option active until you are familiar with the tool names.

Understanding advanced toolbars

The default toolbars represent a fraction of the tools available to you in Acrobat. Many of the other toolbars remain hidden from view. The reason for this is obvious when you load all the toolbars in the Toolbar Well. You lose a lot of viewing real estate when all toolbars are docked in the Toolbar Well. Unless you have a large display monitor or a second monitor, working on a file in the Document pane when all toolbars are in view gives little room to see document pages. Fortunately, by managing the toolbars you can elect to show only the tools you want to work with and you can move them around the Acrobat window, allowing for the best view.

You open toolbars from menu commands in the Tools menu or by opening a context menu on the Toolbar Well. If you're a seasoned Acrobat user, your first encounter with Acrobat viewers 6 and above might be a bit frustrating if you don't know how to access the tools you want to use. "Where is that Form tool?" you may ask. Don't worry; it's there. You just have to poke around and search for it or, better yet, look over the following descriptions to understand more about how these other tools are grouped into separate toolbars.

Opening advanced toolbars

For the purpose of discussion, I'll refer to the non-default toolbars as advanced toolbars. Acrobat does not refer to all these tools as advanced tools. Some of the tools labeled in the menu commands are not referred to as advanced tools. For clarity in this chapter, though, consider all the following toolbars as advanced toolbars.

You can use three methods for displaying toolbars not visible when you open Acrobat. You can open the View ⇨ Toolbars menu where you find a list of tools in submenus. Select a submenu item to open a toolbar as a floating toolbar in the Acrobat window. Another method is to open a context menu on the Toolbar Well and open toolbars from commands in the menu. A third option, and one that provides more options for viewing all tools and toolbars in a single window, is to use the

More Tools menu command when you open a context menu on the Toolbar Well. As a matter of routine, you should use this option when preparing an Acrobat session that requires you to use several tools and toolbars. All tools except the Form tools Pro are accessible from the context menu.

Analysis toolbar

In Acrobat 8 you had the Measuring toolbar and the Object Data tool opening in two separate toolbars. These two toolbars have been added to a new toolbar in Acrobat 9 shown in Figure 1.25. In addition to these tools you find the Geospatial Location tool and the Geospatial Registration tool (Acrobat Professional Extended only) that enable you to view geospatial data on maps.

FIGURE 1.25

The Analysis toolbar combines the Measuring tools and the Object Data tool with the new Geospatial tools added in Acrobat Professional Extended.



Advanced Editing toolbar

The Advanced Editing toolbar shown in Figure 1.26 is one you'll use in just about all Acrobat editing sessions. Tools include the Select Object tool that is used to select content you add in Acrobat such as comment markups and form fields. The Article tool is used to create article threads; the Crop and Link tools follow. The TouchUp Text tool is used to edit text on a page, the TouchUp Reading Order is used with accessibility editing, and the last tool is the TouchUp Object tool that is used to select objects such as vector objects and images.

NEW FEATURE

You'll notice that the Advanced Editing toolbar does not contain the Movie tool and the Sound tool. These tools have been moved to the new Multimedia toolbar in Acrobat 9. Also notice you have the Button tool in the Advanced Editing toolbar but no access to the other form tools. See "What happened to the Forms tools?" later in this chapter.

CROSS-REF

For more information about PDF editing using the Advanced Editing tools, see the chapters in Part III. To learn more about the Link tool, see Chapter 22. To learn how to use the TouchUp Reading Order tool that follows the TouchUp Text tool, see Chapter 25.

FIGURE 1.26

The Advanced Editing toolbar contains a miscellaneous group of tools used for many different editing functions.



Comment & Markup toolbar

When you open either the View ⇨ Toolbars submenu or a context menu on the Toolbar Well, the first menu option after the default Advanced Editing toolbar is the Comment & Markup toolbar. Additionally, you can open the Comment & Markup toolbar from the Comment task button pull-down menu and a menu command in the Comments menu. Select the menu option and the Comment & Markup tools open in their own toolbar. Open a context menu on the toolbar and select Show All Commenting Tools. The toolbar appears as you see in Figure 1.27 when all tools are loaded.

FIGURE 1.27

Open the Comment & Markup toolbar and open a context menu on a tool and select Show All Tools to see all the comment and markup tools.



TIP

When you select the Comment & Markup tools from the More Tools window and check the boxes for all tools, all the tools are loaded *except* the Paste a copied image as stamp tool. To show the tool in the Comment & Markup toolbar, open the Comment & Markup toolbar and open a context menu on any tool in the toolbar. Select Show All Tools and the Paste a copied image as stamp tool is added to the toolbar.

CROSS-REF

For more information on using all the Comment & Markup tools, see Chapter 20.

Edit toolbar

The Edit toolbar is the home of a miscellaneous group of editing tools, such as spell-checking, copy, undo, and redo. (See Figure 1.28.)

FIGURE 1.28

The Edit toolbar contains a miscellaneous selection of tools used for spell-checking and editing.



Multimedia toolbar

The Multimedia toolbar combines the Movie, Sound, and 3D tools found in the Advanced Editing toolbar in earlier versions of Acrobat along with the new Flash tool. Note that the Movie tool has been renamed as the Video tool (See Figure 1.29).

CROSS-REF

For more information about using the Multimedia tools, see Chapter 23.

FIGURE 1.29

The Multimedia toolbar offer options for adding media to PDF documents.



Print Production toolbar

The Print Production toolbar (see Figure 1.30) enable you to make adjustments on the PDF or alter the content. This toolbar contains tools for assigning traps, preflighting, converting colors, assigning color profiles, adding crop marks, cropping pages, fixing hairlines, transparency flattening, and assigning Job Definitions.

FIGURE 1.30

Use the Print Production tools to open dialog boxes where you can preview and change PDF documents to accommodate prepress and commercial printing.



CROSS-REF

For more information on using Print Production tools and preparing files for commercial printing, see Chapter 32.

Redaction toolbar

The Redaction tools are particularly helpful for users who need to remove text content from documents to protect sensitive data such as the names of minors, personal privacy information, and data breaching security policies. When you open the Redaction toolbar you'll see four tools to help you redact PDF documents as shown in Figure 1.31.

FIGURE 1.31

Redaction tools are used to remove sensitive information from PDF documents.



CROSS-REF

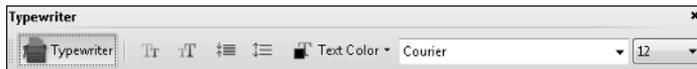
For a complete explanation of redaction and using the Redaction tools, see Chapter 14.

Typewriter toolbar

The Typewriter tool was added to all Acrobat viewers in a maintenance upgrade during the Acrobat 7 life cycle. This toolbar, shown in Figure 1.32, contains tools for typing text on PDF documents. It's particularly helpful when filling out PDF forms that don't have form fields. Notice the new additions in Acrobat 9 for changing fonts, font colors, and font point sizes.

FIGURE 1.32

New additions to the Typewriter tool include changing fonts, font colors, and font point sizes.



CROSS-REF

For more information on using the Typewriter tools, see Chapter 33.

Properties Bar

You use the Properties Bar (see Figure 1.33) in conjunction with several different tools. After you create comments, links, buttons, and similar content in a PDF document, the selected comment, link, button, and so on displays current properties such as colors, fonts, and line weights in the Properties Bar. You can make changes in the Properties Bar without visiting the Properties dialog box. You can quickly open the Properties Bar with a keyboard shortcut (Ctrl/~~⌘~~+E) or via a context menu opened on the Toolbar Well.

FIGURE 1.33

The Properties Bar offers a quick solution for editing item properties without the need for opening dialog boxes.



What happened to the Forms tools?

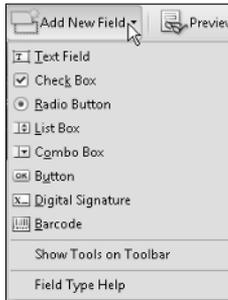
Don't be alarmed when you first open Acrobat 9 and look for the Forms toolbar. The form tools are all available to you but they don't appear in the current viewer mode when you open a PDF document. You need to change modes to the new Acrobat 9 Form Editing Mode.

NEW FEATURE

Choose **Forms** ⇨ **Start Form Wizard** or **Add or Edit Fields** and you'll change the interface mode to **Form Editing Mode**. Instead of a toolbar housing the Form tools, you'll find all the same form tools available to you under the **Add New Field** pull-down menu as shown in Figure 1.34.

FIGURE 1.34

Enter Form Editing Mode and choose a form tool from the Add New Field pull-down menu.



Form Editing Mode does have a toolbar; however, the Form Editing Mode toolbar is not one that you can undock from the area reserved for toolbars. Toolbars are fixed to a location similar to the Acrobat Toolbar Well in Form Editing Mode appearing at the top of the window. If you want the individual tools to appear without having to open the Add New Field menu, open the menu and choose Show Tools on Toolbar. The individual form tools are displayed on the Form Edit toolbar as shown in Figure 1.35.

FIGURE 1.35

Open the Add New Field pull-down menu and choose Show Forms Toolbar to display the individual form tools in the Form Edit toolbar.



Customizing the Acrobat workplace

Whether you're an Acrobat pro or a new Acrobat user, seeing all those toolbars loaded and scattered across the Toolbar Well for the first time can be very intimidating. As you poke around and possibly feel a little frustration when trying to identify the right tool icon to select the right tool for the task at hand, please realize that Acrobat is a multifaceted program serving a huge array of needs for different users. Not all the tools and features are designed for use in a single Acrobat session. You may be a PDF forms author with a need only for Basic tools, Navigation tools, Edit tools, and who switches over to Form Editing Mode. In another session you may be a reviewer and only have need for the Comment and Markup tools. You might be an eBook author and need to work with many features for creating and viewing eBooks, or you might want to edit PDF pages and post modified PDFs on your Web site.

When learning all the tools and commands contained in Acrobat, be certain to look over all the chapters where tools are discussed. Learn how to access toolbars and organize them in the Toolbar Well. When you begin a new Acrobat session, set up your environment so you can easily select a tool from toolbars you dock in the Toolbar Well.

As a starting point, you can configure Acrobat to provide you with immediate feedback related to tools selection and keyboard shortcuts. As you first start using Acrobat, follow the steps in the next section to help you customize your environment for more efficient editing and less frustration. In this example, an environment for engaging in a commenting session is used. You can change the toolbars to meet needs in PDF editing or PDF creation, or add tools for some other kind of work you do.

STEPS: Setting up the Acrobat environment

1. **Return to toolbar defaults.** Open Acrobat. Position the cursor on any area in the Toolbar Well and right-click to open a context menu (Control+click for Macintosh) and select Reset Toolbars.
2. **Open the More Tools window.** From a context menu opened from the Toolbar Well, select More Tools to open the More Tools window.
3. **Add the tools you intend to use to the Comment & Markup toolbar.** This is a personal choice. Look over all the Comment & Markup tools and check just those tools you intend to use. Be certain to check the box for the Comment & Markup toolbar so the toolbar shows up when you leave the More Tools window. (See Figure 1.36.)

FIGURE 1.36

The More Tools window

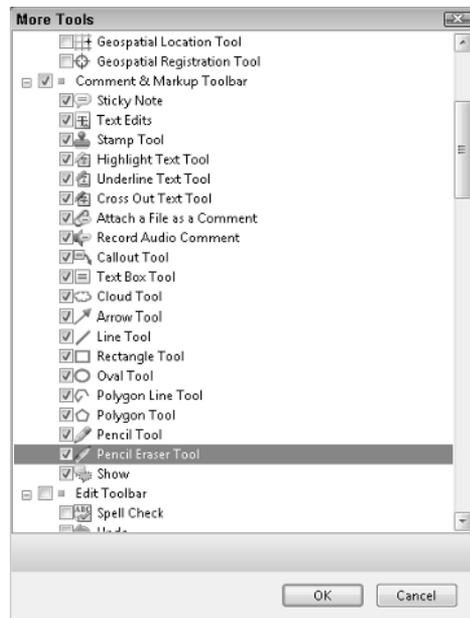


FIGURE 1.38

Place the cursor over a tool and pause a moment before selecting the tool. A tooltip describing the tool opens below the mouse cursor.



As you become familiar with the tools, you can return to the context menu opened from the Toolbar Well and choose Button Labels \leftrightarrow No Labels. When No Labels is active, your toolbars shrink and offer you more room in the Toolbar Well.

Panels

Other tools available to you in all Acrobat viewers are *panels*. Panels are similar to toolbars in that they can be docked to a docking station called the Navigation pane; they can be undocked and floated around the Acrobat window; they can contain pull-down menus for selecting more options; a series of default panels appears docked in the Navigation pane; and you can open additional panels from menu commands.

A couple distinctions between toolbars and panels are that panels can be placeholders for information, and tools can appear inside a panel. Whereas tools are used in the Document pane, many panel operations take place directly in the panel. Toolbars remain relatively fixed in size, but panels can be sized and stretched along the Acrobat window to provide you with more room to work within the panel or view the information contained within the panel. In addition, some panels contain their own tools where edits can be made in the panel and dynamically reflected on the document page. Panels help you organize content, view specific content across many pages, and provide some tools for global editing of PDF files.

Default panels

As with toolbars, Acrobat displays a series of panels docked in a well when you first launch the program. Panels are contained in the Navigation pane along the left side of the Acrobat window. By default, the Navigation pane is collapsed; however, you can save PDF documents in such a manner where a panel expands when a file is opened in any Acrobat viewer. These settings are document-specific and can be toggled on or off for individual PDF documents.

CROSS-REF For more information about setting opening views for panel displays, see Chapter 4.

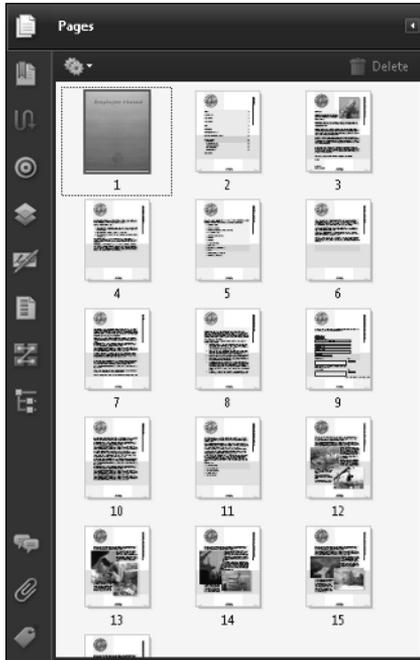
Pages



Acrobat users have been familiar with the thumbnail view of each page since the early days of Acrobat. A mini view of each page in the active PDF document is displayed in the Pages pane, as shown in Figure 1.39. The Pages pane offers you menu options for arranging, deleting, inserting, and editing pages in a number of ways. You can zoom in to the thumbnail views as large as or even larger than a page viewed in the Document pane.

FIGURE 1.39

Thumbnails are found in the Pages panel in all Acrobat viewers. The thumbnail view of document pages can be sized larger and smaller using context menu commands.



CROSS-REF For a complete description of working with pages (thumbnails), see Chapter 16.

Bookmarks

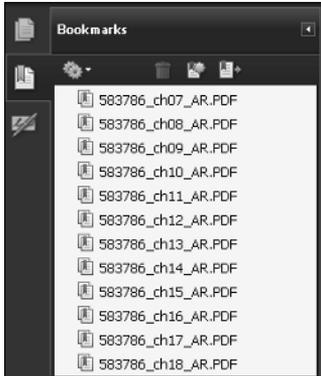


The second default panel in the Navigation pane is the Bookmark panel. You can save PDF documents in a manner where the bookmarks are visible when the file opens in Acrobat. Bookmarks are visible in an open Navigation pane, as shown in Figure 1.40. You can open and close the Navigation pane by pressing F4. You can also grab the vertical separator bar at the right edge of the Navigation pane and move it left and right to size the pane.

Bookmarks are navigation buttons that can launch a page, a view, or one of many different Action types similar to link and button actions. Anyone familiar with Acrobat already knows much about bookmarks and how to navigate pages by clicking individual bookmarks in the panel.

FIGURE 1.40

Bookmarks can be displayed in the Navigation pane when a file opens.

**CROSS-REF**

To learn how to create and manage bookmarks and add actions, see Chapter 17.

Signatures

Digital signatures help you manage signed documents; the Signatures panel enables you to perform tasks such as displaying signatures in the Signature pane, verifying signatures, clearing them, deleting them, and so on. All these editing tasks with signatures are still available in Acrobat Professional and Acrobat Standard as is signature validation, which is also available in all Acrobat viewers.

CROSS-REF

For a complete description of creating and managing digital signatures, see Chapter 26.

Attachments

The Attachments pane (see Figure 1.41) in all Acrobat viewers is used to display, manage, and extract file attachments. You can attach files in Acrobat and extract file attachments using all Acrobat viewers including Adobe Reader.

FIGURE 1.41

The Attachments panel provides options for managing file attachments. Attachments can be extracted from within Adobe Reader.



CROSS-REF For a complete description of adding file attachments to PDF documents, see Chapter 15. For more on extracting attachments from within Adobe Reader, see Chapter 3.

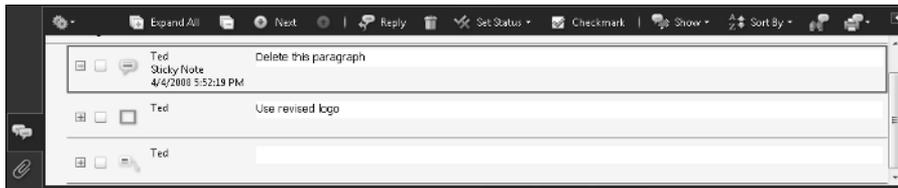
Comments



The Comments panel shows you comments in an expanded horizontal view, just like the Attachments panel. When you click the Comments panel, you'll notice a number of pull-down menus (signified by down-pointing arrows at the top of the pane), a list of comments that can be expanded and collapsed, and a host of tools within the panel, as shown in Figure 1.42.

FIGURE 1.42

The Comments panel



CROSS-REF For a complete description of creating and managing comments, see Chapters 20 and 21.

Hidden panels

As with toolbars, you can choose to view additional panels through menu commands. You can choose to display a number of other panels in the Acrobat window and dock them in the Navigation pane. To open a hidden panel, choose View ⇨ Navigation Panels. From the submenu, you'll find all the panels available. In Figure 1.43, the list shows Navigation panels available in Acrobat Pro Extended.

Another way to access the Navigation panels is through a context menu. Right-click (Windows) or Control+click (Macintosh) on the Navigation pane and a menu shows all the Navigation panels. In order to see the panels, you must first open them from the Navigation Panels submenu and dock them in the Navigation pane. Opening a context menu offers an additional menu command for Show/Hide Navigation Panel Buttons as shown in Figure 1.44.

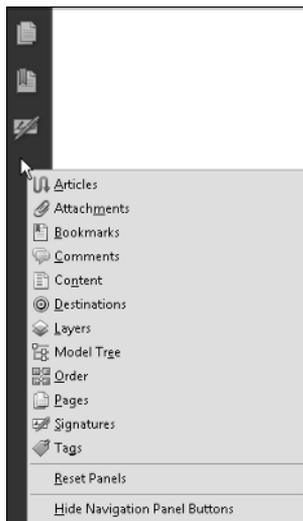
The list includes the default panels. If you select a default panel, the Navigation pane opens and the panel is selected. When you select a hidden panel — in other words, a panel other than those docked in the Navigation pane when you first launch Acrobat — the panel opens in the Acrobat window as a floating panel with one or more panels contained in the window. Drag a panel to the Navigation pane and it docks and then becomes visible in a context menu opened from the Navigation pane.

FIGURE 1.43

Open the Navigation Panels menu and a submenu displays all Navigation panels.

**FIGURE 1.44**

Once Navigation panels have been docked in the Navigation pane, they appear in a context menu opened from the Navigation pane.



Articles



The first of the hidden panels listed in the Navigation Panels submenu is Articles. Choose View ⇨ Navigation Panels ⇨ Articles to open a floating panel. Articles enable you to create article threads to help users follow passages of text in a logical reading order. You won't find any new features added to the Article tool since Acrobat 5.

CROSS-REF

For information on creating article threads and managing them, see Chapter 5.

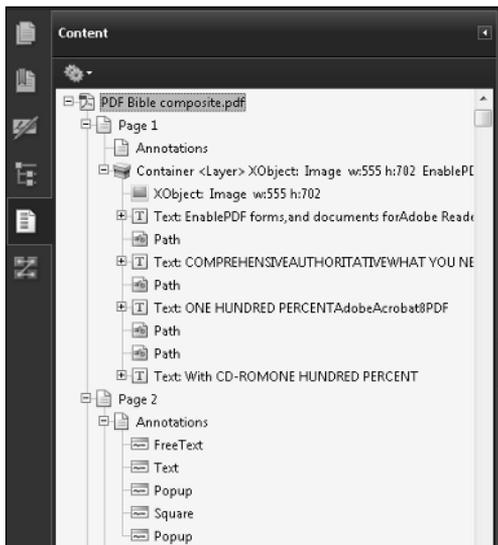
Content



A panel designed for managing the structural content of PDF documents is found in the Content panel. When you choose View ⇨ Navigation Panels ⇨ Content, the Content panel opens in a floating panel as shown in Figure 1.45. Content features help you reflow tagged PDF files and manipulate the structure of tagged documents.

FIGURE 1.45

The Content panel opens in a floating panel where the structural content of the open file is reported.



CROSS-REF

For information on working with the Content panel and tagged PDF documents, see Chapter 25.

Destinations



Destinations work similarly to bookmarks, in that specific views are captured and listed in the panel. Clicking a destination opens the associated page in the Document pane, whereas clicking a bookmark opens the associated view (page and zoom).

CROSS-REF

For information on creating destinations and managing them, see Chapter 22.

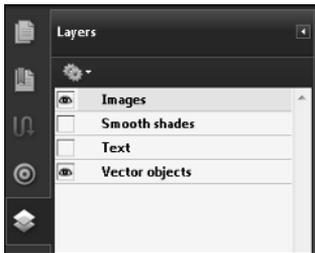
Layers



If you create documents containing Adobe PDF layers, the Layers panel permits you to toggle layer views and work with layer properties. In Figure 1.46, the Layers panel is open showing visible and hidden layers.

FIGURE 1.46

The Layers panel enables you to manage layer visibility.



CROSS-REF

To understand more about working with Adobe PDF layers, see Chapter 24.

Model Tree



The Model Tree panel lets you examine information related to 3D drawings. You can review assets, hide and show drawing parts, toggle views, review comments, and more on 3D drawings. In Figure 1.47 you can see the model tree shown for a 3D image.

CROSS-REF

For more information about viewing 3D drawings and Acrobat 3D, see Chapter 2.

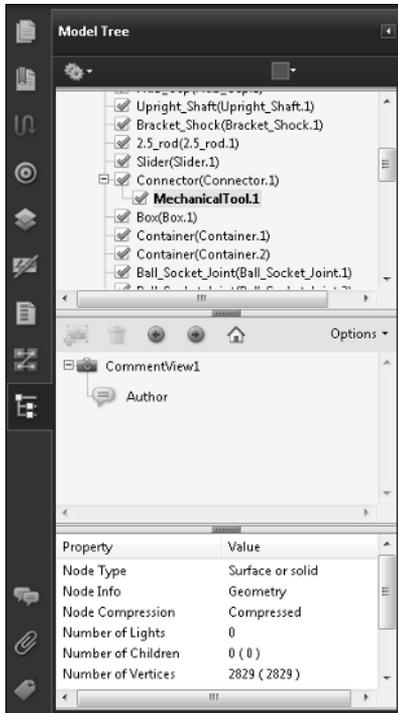
Order



You use the Order panel to manage reading order of documents. This panel also relates to document accessibility, like the options available in the Tags panel. The Order panel enables you to add tags to a document, clear tags, and reorder a page's contents to change a reading order that might be read aloud by a screen reader.

FIGURE 1.47

The Model Tree panel is designed to work with 3D drawings.



CROSS-REF For information on working with the Order panel, understanding screen readers, and document accessibility, see Chapter 25.

Tags



Tagged PDF files provide more editing capability with PDF documents, and the files can be made accessible to adaptive devices such as screen readers. For adding, editing, and annotating tags in PDF documents, use the Tags panel. Together with the Content panel options, you have much control over document accessibility.

CROSS-REF To understand accessibility and the advantages of creating tagged PDF documents, see Chapter 25.

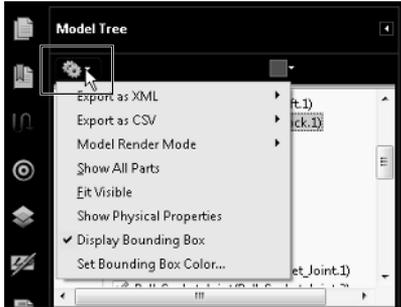
Panel menus

Each of the panels contains its own pull-down menu. When a panel is open in the Navigation pane or in a floating window, select the Options down-pointing arrow to open a pull-down menu, as shown in Figure 1.48. Menu commands found in panels may or may not be available from the

top-level menu bar. Additionally, some panels, like the Attachments and Comments panels, offer you several pull-down menus.

FIGURE 1.48

Panel Options menus provide menu commands specific to each panel function.

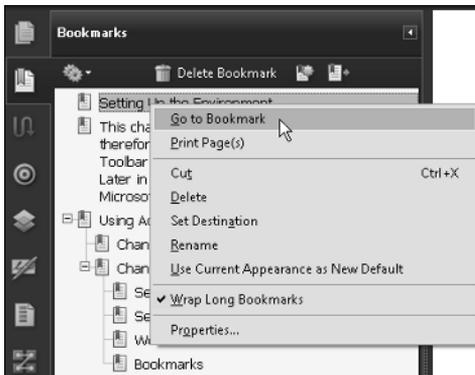


Context menus

Context menus can display different options for panel choices depending on where you open a context menu. If you move the cursor to an empty area when all text and objects in a panel are deselected and open a context menu, the menu options may be different than when you select text or an object in a panel. However, this is not always the case, because a few panels provide you with the same options regardless of whether something is selected or not. In Figure 1.49 a context menu is opened within the Bookmarks panel. In this case you need to open the menu on a bookmark name. If you attempt to open a context menu in an empty area in the pane, no menu opens.

FIGURE 1.49

A context menu opened on a bookmark.



Understanding Preferences

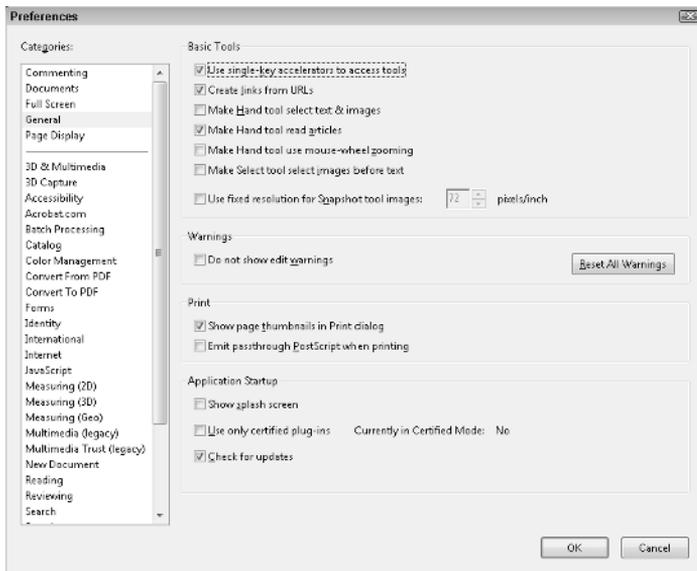
Preferences enable you to customize your work sessions in Acrobat. You can access a Preferences dialog box from within any Acrobat viewer and from within a Web browser when viewing PDFs as inline views. A huge number of preferences exist that all relate to specific tool groups or task categories, and it would not make as much sense to cover them here in the opening chapter as it would within chapters related to using tools and methods influenced by preference choices.

Some general things you should know about preferences is that they are contained in a dialog box as shown in Figure 1.50. You make a topic selection in the list on the left side of the dialog box and the related preferences are shown to the right side of the list. You make choices for preferences by selecting check boxes or making menu selections from pull-down menus. When you complete making your preference choices, click OK at the bottom of the dialog box.

Almost all the preferences you change in the Preferences dialog box are dynamic, which means you don't need to quit Acrobat and relaunch the program for a preference choice to take effect. Preferences remain in effect until you change them again. If you quit Acrobat and relaunch the program, the preferences you last made are honored by Acrobat. However, if for some reason the program crashes and you don't shut it down properly, any new preference changes will not be recognized when the program is launched again.

FIGURE 1.50

Press **Ctrl/⌘+K** to open the Preferences dialog box. Click a category on the left and the choices are reflected to the left of the categories list.



If you find some operation in Acrobat not working as you think it should, first take a look at the Preferences dialog box. In many cases you'll find a check box or menu command not enabled to permit you to perform a task. As you become familiar with specific tool groups and menu commands, make a habit of routinely visiting the Preferences dialog box so you understand all the toggles and switches that affect tool and viewing behavior.

Summary

This chapter offers you a general introduction for working in Acrobat Standard Acrobat Pro and Acrobat Pro Extended and helps you understand the environment, the user interface, and some of the many new features added to the commercial Acrobat products. At the very least, you should know how to go about finding help when you first start working in the program. Some of the more important points discussed in this chapter include the following:

- Adobe Acrobat is a multifaceted program designed to provide solutions for many different business professionals. Several types of Acrobat viewers exist, ranging in features to suit different user needs. The most sophisticated of the three viewers is Acrobat Pro Extended (Windows), now in version 9. Acrobat Standard (Windows only) offers fewer tools and menu commands than Acrobat Pro (Windows and Macintosh).
- PDF, short for Portable Document Format, was developed by Adobe Systems and was designed to exchange documents between computers and across computer platforms while maintaining file integrity.
- The PDF language format has changed version numbers along with the Acrobat viewers. Beginning in Acrobat 9, the PDF specification is no longer owned by Adobe. The International Organization for Standards now regulates the PDF specification.
- Tasks are performed through the use of menus, tools, and panels that can be accessed through mouse selections and keyboard shortcuts.
- The extensive list of tools appears in an abbreviated form when you open Acrobat and view the default toolbars. You can open additional toolbars from menu commands or the new More Tools window. You can dock toolbars in the Toolbar Well or float them around the Acrobat window.
- Panels are similar to toolbars in that they can be docked and undocked from a well called the Navigation pane. Panels contain pull-down menus, and some panels contain tools.
- You can customize the Acrobat workplace to suit your work style through the use of different preference choices. When preferences, panels, and toolbars are changed from their default views, the new views are saved when you quit your Acrobat session. They remain unchanged until you change them again or reset them to defaults.
- Preferences are settings that apply globally to Acrobat and influence the behavior of tools and menu commands.