WORKING WITH PDF FILES – PART 1: USING ADOBE READER/ACROBAT

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1. PDF File Basics
- What is a PDF file and why do we use them?
- Where do we as translators encounter PDF files?
- Problems associated with PDF files

2. PDF Tools
- **Adobe Acrobat**
  - Products: Adobe Reader, Adobe Acrobat Standard, Adobe Acrobat Pro, Adobe Acrobat Pro 9 Extended / Adobe Acrobat X Suite
  - Product comparison: www.adobe.com/products/acrobat/matrix.html
  - Latest version: Adobe Reader/Acrobat X (10)
  - (In)compatibility with earlier versions
- **Other "Comparable" non-Adobe Products**
  - PDF Nitro (Express, Professional, and free version): www.nitropdf.com
  - Foxit PDF Tools (Reader, Editor, Creator, Phantom etc.): www.foxitsoftware.com/pdf
  - Solid PDF Tools: www.soliddocuments.com
  - DocuCom PDF Gold: www.pdfwizard.com
  - Pdf995Suite: www.pdf995.com
  - And many others
  - Verify compatibility with Acrobat features

3. Editing and Commenting PDF Files
- Using Commenting Tools in a normal document review cycle – don't use only sticky note comments
  - Available in **Reader ver. 9** only if the PDF file author has enabled them using Adobe Acrobat Pro:
    - **Acrobat ver. 9:** Advanced > Extend Features in Adobe Reader
    - **Acrobat ver. X:** File > Save As > Reader Extended PDF > Enable Commenting In Adobe Reader
  - Commenting with highlighter and sticky notes available in **Reader ver. X** without the need to enable them; other commenting tools require enabling
- Comment & Markup tools
  ver. 9: Tools > Comment & Markup / Tools > Customize Toolbars / View > Toolbars > Comment & Markup [*see Figure 2*]
  ver. X: Tools/Comment in the right-side pane [*see Figure 1*]
  - Text Edits, Highlight Text, Callout, Arrow, Rectangle, etc.
  - Show/Hide Comments
  - Show/Hide Comments List [*see Figures 3 and 4*]
  - Spell checking: Edit > Check Spelling > In Comments…

- ▪ Settings: Edit > Preferences > Spelling
    - o Exporting comments as an FDF (Form Data Format) file:
      ver. 9: Document > Comments > Export Comments to Data File
      ver X: Comments List > Options > Export to Data File
    - o Printing Comments: File > Print > Comments and Forms > Document and Markups (or Document and Stamps) [*see **Figure 4**]
    - o Identity setup: Edit > Preferences > Identity
- Typewriter tool (= "Add Or Edit Text Box" tool)
    - o Available in Reader only if the PDF author has enabled it using Adobe Acrobat Pro:
        - ▪ **Acrobat ver. 9:** Tools > Typewriter > Enable Typewriter Tool in Adobe Reader *or* Advanced > Extend Features in Adobe Reader
        - ▪ **Acrobat ver. X:** File > Save As > Reader Extended PDF > Enable Adding Text in Documents
- Summarizing Comments: Comments > Summarize Comments – only in Acrobat
- Touching up text (changing text and text properties) – only in Acrobat
    - o Tools > Advanced Editing / Advanced Editing toolbar
    - o TouchUp Text Tool
    - o Crop (also Document > Crop Pages)
    - o **Acrobat ver. X:** Tools > Content > Edit Document Text
- Inserting/extracting/rearranging pages – only in Acrobat
    - o Document > Insert/Extract/Replace/Delete Pages, or use the Pages navigation pane on the left
    - o **Acrobat ver. X:** Tools > Pages >... (or use the Page Thumbnails panel of the navigation pane)
- E-mail-based review or shared review (on acrobat.com) for multi-party reviews

4. Searching for Text in PDF Files
- Edit > Find: text within the current document
- Edit > (Advanced) Search: text in one or more files [*see **Figure 5**]
    - o Basic Search Options
    - o Advanced Search Options
- Indexing (only in Acrobat): possibility to index hundreds of files for quick searching
    - o Select Advanced > Document Processing > Full Text Index with Catalog > New Index
    - o Name the index, select directories to be included, click Build and specify location for the index file
    - o Use the resulting .pdx file for searching
    - o **Acrobat ver. X:** Tools > Document Processing > Full Text Index With Catalog > New Index
- Creating a Searchable Image
    - o With the image file open in Acrobat, select Document > OCR Text Recognition > Recognize Text Using OCR
    - o This can also be done with scanned images: Document > Scan to PDF
    - o **Acrobat ver. X:** Tools > Recognize Text > In This File (*or* In Multiple Files)

5. Viewing and Zooming PDF Files
- **ver. 9:** Tools > Select & Zoom > Marquee Zoom / Dynamic Zoom / Pan & Zoom Window/ Loupe Tool / Snapshot Tool [*see **Figure 7***]
- **ver. X:** View > Zoom > Marquee Zoom / Dynamic Zoom / Pan & Zoom / Loupe Tool [*see **Figure 6***]
- **ver. X:** Edit > Take a Snapshot

6. Creating and Filling Electronic Forms
- Simple filling with Typewriter tool
- Using text boxes
- Fillable forms (IRS W-9)
- Converting electronic files to forms using Form Wizard
- Blueberry PDF Form Filler; FREE application for filling in and printing PDF forms (www.bbconsult.co.uk/Resources/PDFFormFiller.aspx)
  - Note: deselect "Lock All Controls" button

7. Using Electronic Signatures
- Inserting a scanned signature
  - Copy and paste via clipboard (as a "stamp")
- Creating and using a digital ID
  - **Creating a digital ID:** Advanced > Security Settings > Digital IDs > Add ID > "A new digital ID I want to create now" > Next > New PKCS#12 digital ID file > Next. Fill the information fields, as needed, click Next. Select location for the ID and define a password. Click Finish to return to the Security Settings dialog box. Click Close.
  - **Signing a PDF document: ver 9:** Advanced > Sign & Certify > Place Signature; **ver X:** Tools > Place Signature. Drag a rectangle where you want to place the signature. Choose a digital ID, type the password, choose appearance and click Sign.

8. PDF File Password Protection and Permission Control
- File > Properties > Security [*see **Figure 8***]
- Unprotecting PDF files

9. Additional PDF-related Links and Info
- www.adobe.com/support/
- www.planetpdf.com
- www.pdfstore.com
- http://desktoppub.about.com (search for "PDF")
- Translator's Tool Box by Jost Zetzsche (www.internationalwriters.com/toolbox): new chapter on PDF files
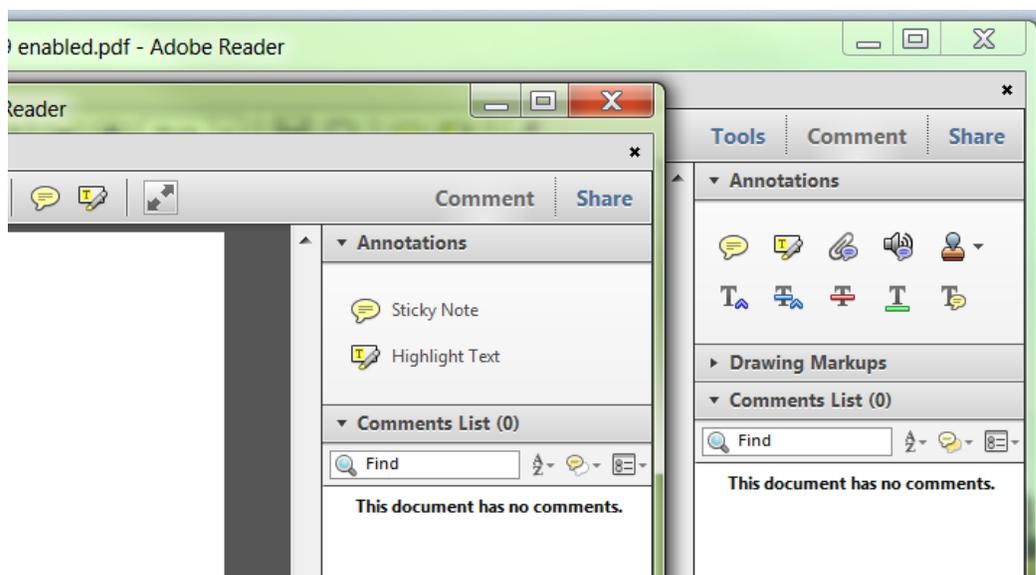
Figure 1. Comparison of the available commenting tools in Adobe Reader X (normal document on the left and an enabled document on the right).
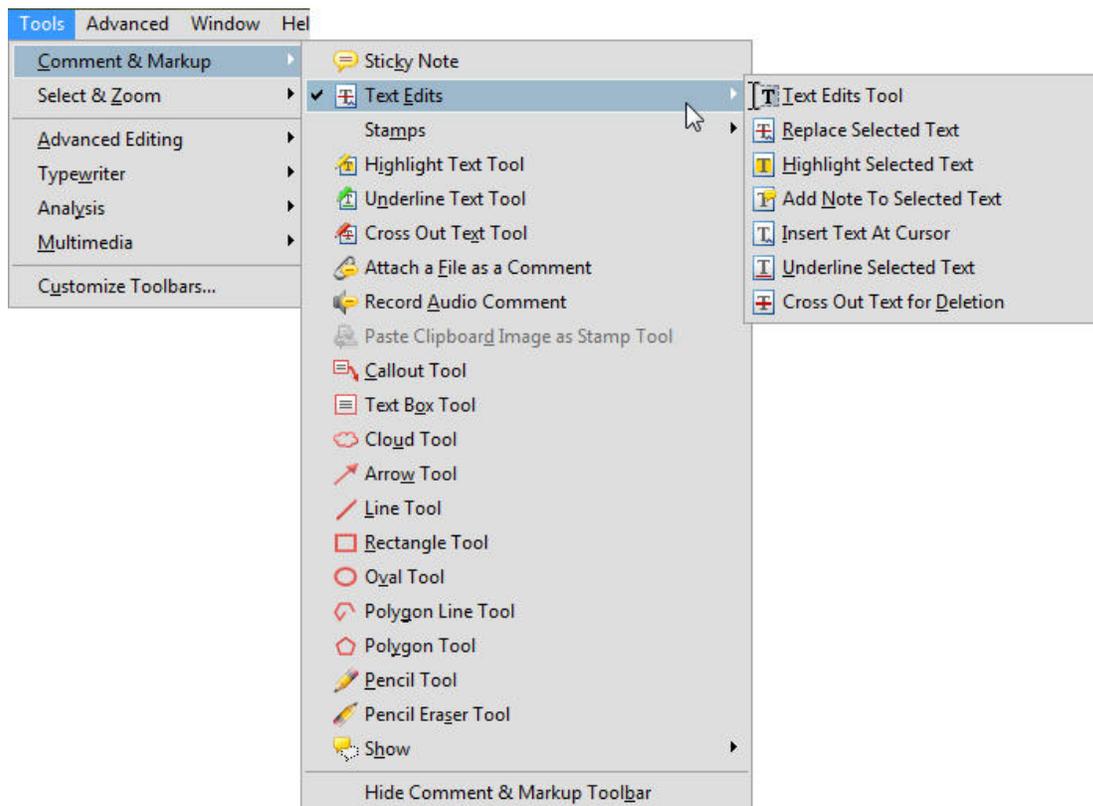

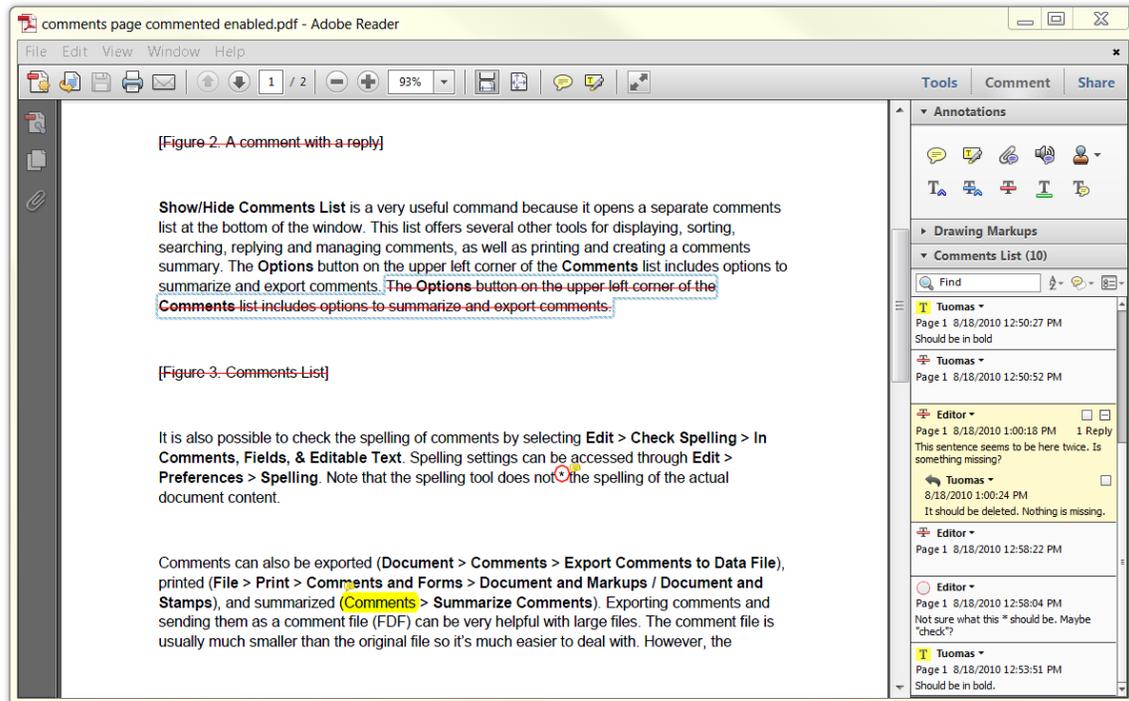**Figure 2. Adobe Acrobat Pro 9:** Tools for commenting and markup.

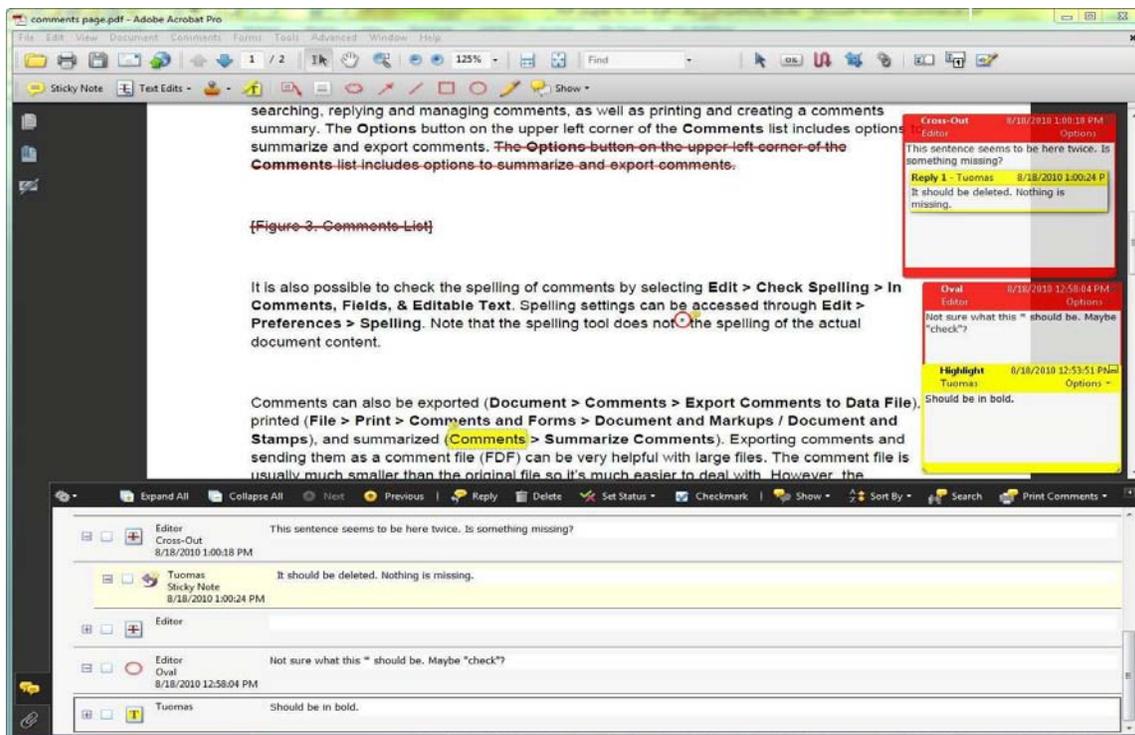**Figure 3. Adobe Reader X:** Comments list open in the right-hand pane.

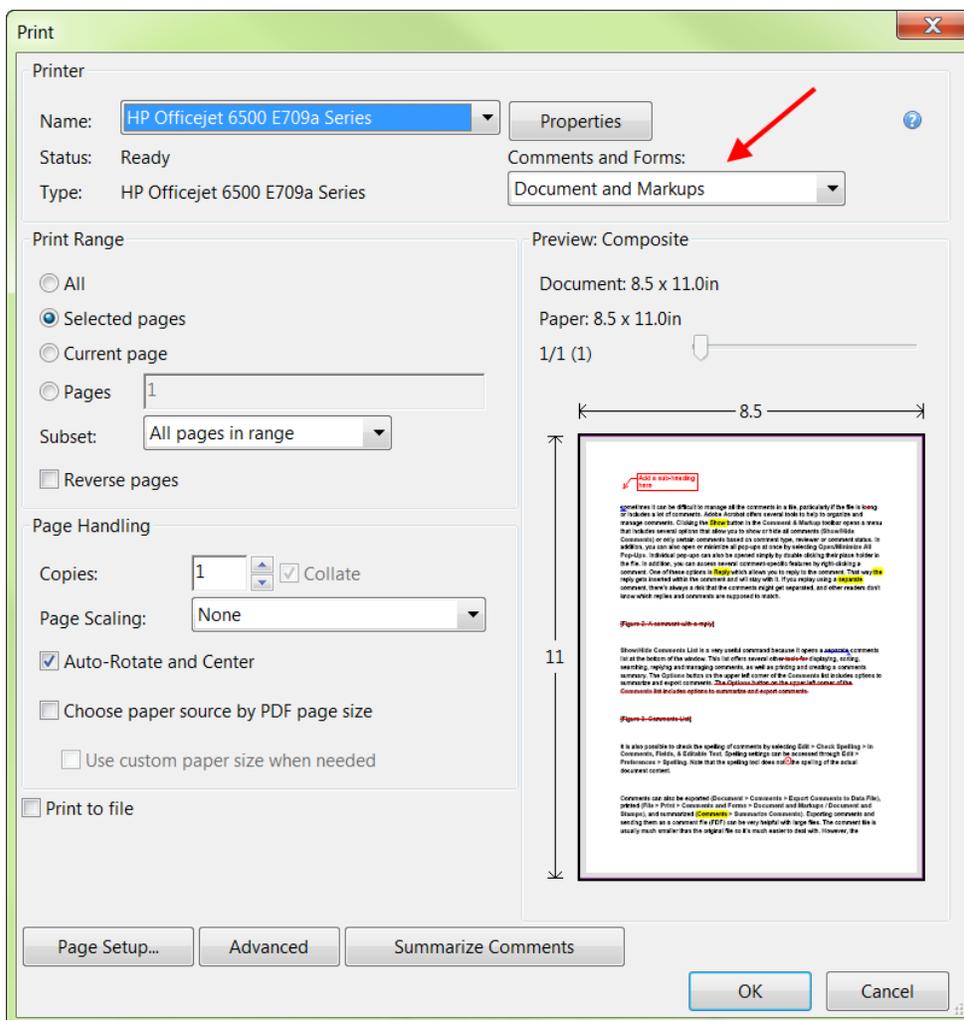**Figure 3. Adobe Acrobat Pro 9:** Comments list open.

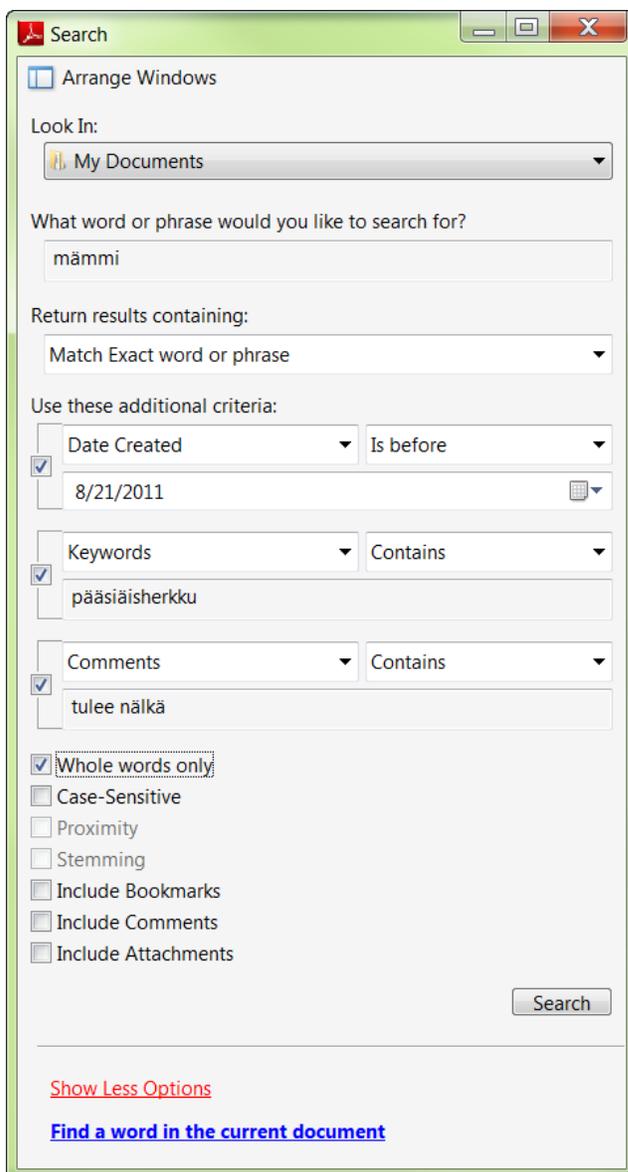**Figure 4. Adobe Reader/Acrobat:** Print settings dialog box. Note that "Markups" have been included for printing.

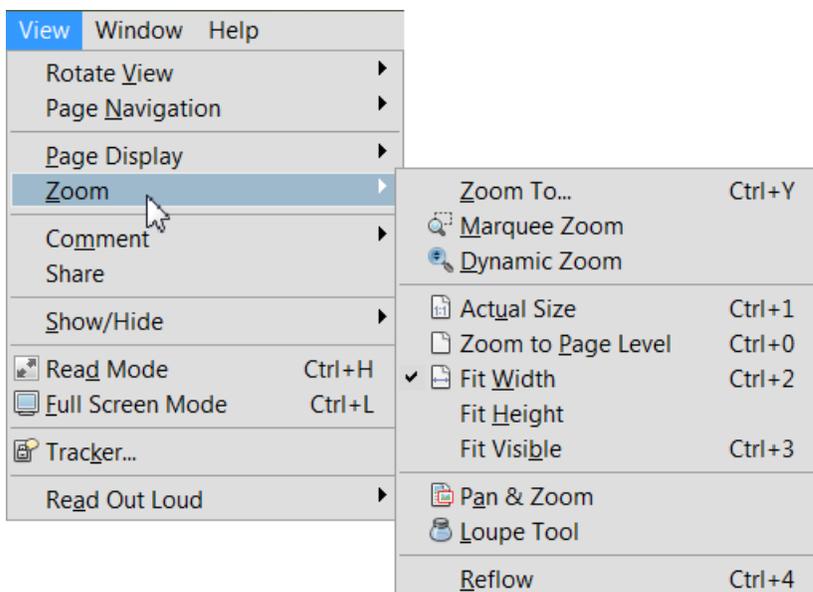**Figure 5. Adobe Reader/Acrobat X:** Search window with advanced search options.
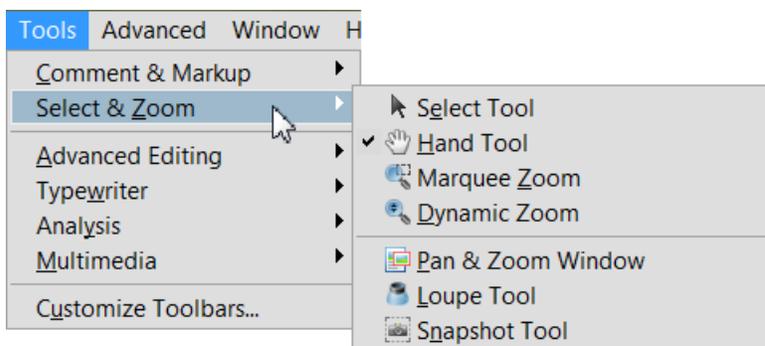
Figure 6. Adobe Reader/Acrobat X: Zooming options.

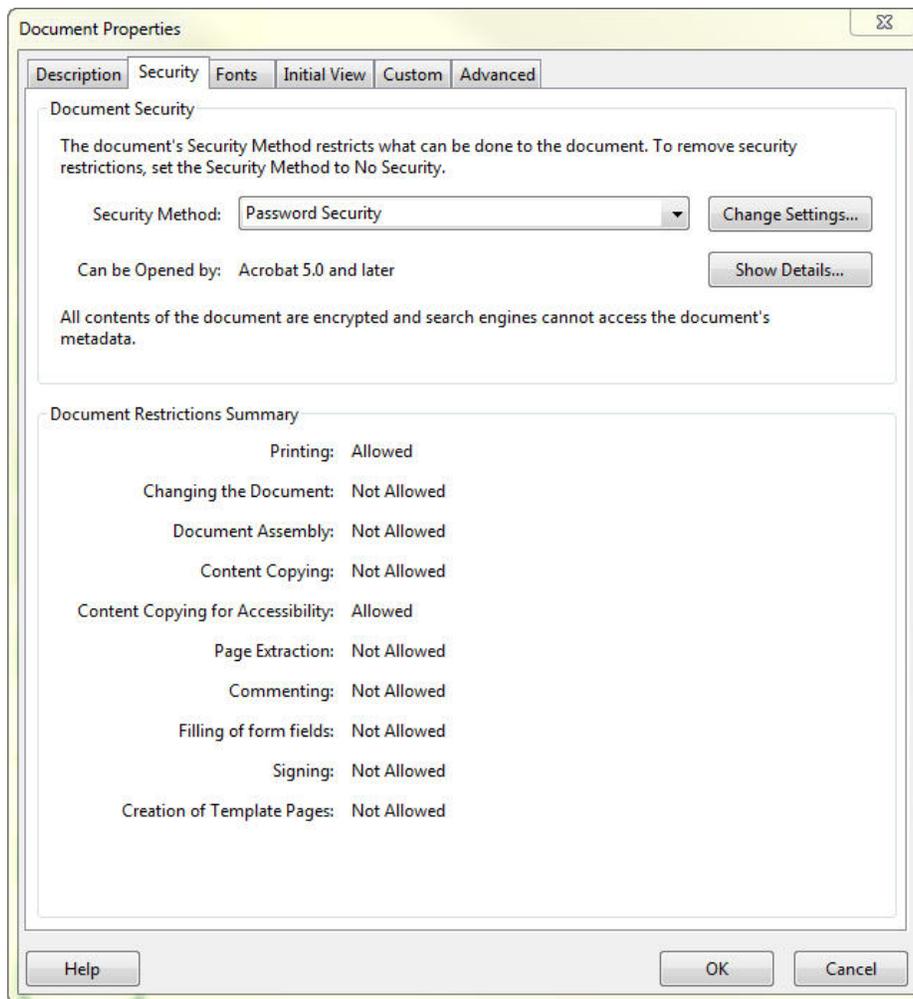**Figure 7. Adobe Reader/Acrobat 9:** Zooming options.

Figure 8. Adobe Acrobat Pro 9: Security Settings dialog box