

Lesson 7

Adobe Acrobat software is a document exchange program that enables users to share files that can be viewed and printed easily with a freely downloadable Acrobat reader. Acrobat allows you to convert virtually any document easily, in a shareable Portable Document Format (PDF). Documents in PDF format retain likeness of the original document with a smaller file size, making them easier to share the document via email, disk, or other means. In addition, Adobe Acrobat contains tools for you to markup, review, and edit changes with PDF documents. Adobe Acrobat allows you to create interactive table of contents, notes, stamps, annotations, bookmarks, and indexes for your document.

The following lesson will show you how to use Adobe Acrobat. In addition, SERFF standards for documents will also be included.

 **Note:** When a state receives a filing for review, it is important to understand that in order for Adobe Acrobat files to be edited, they must first be detached from the original filing, annotations and/or corrections must be made to the document, the document must be saved as the edited version (with a different file name), and finally, the edited version must be attached to the filing in either a Response Letter or Amendment. **The original Adobe file always stays with the original filing.**

This lesson covers the following topics:

-  [Introduction to Acrobat](#)
-  [Creating and Editing Acrobat Pages](#)
-  [Marking Up an Acrobat Document](#)
-  [Advanced Acrobat Features](#)
-  [Creating Forms](#)



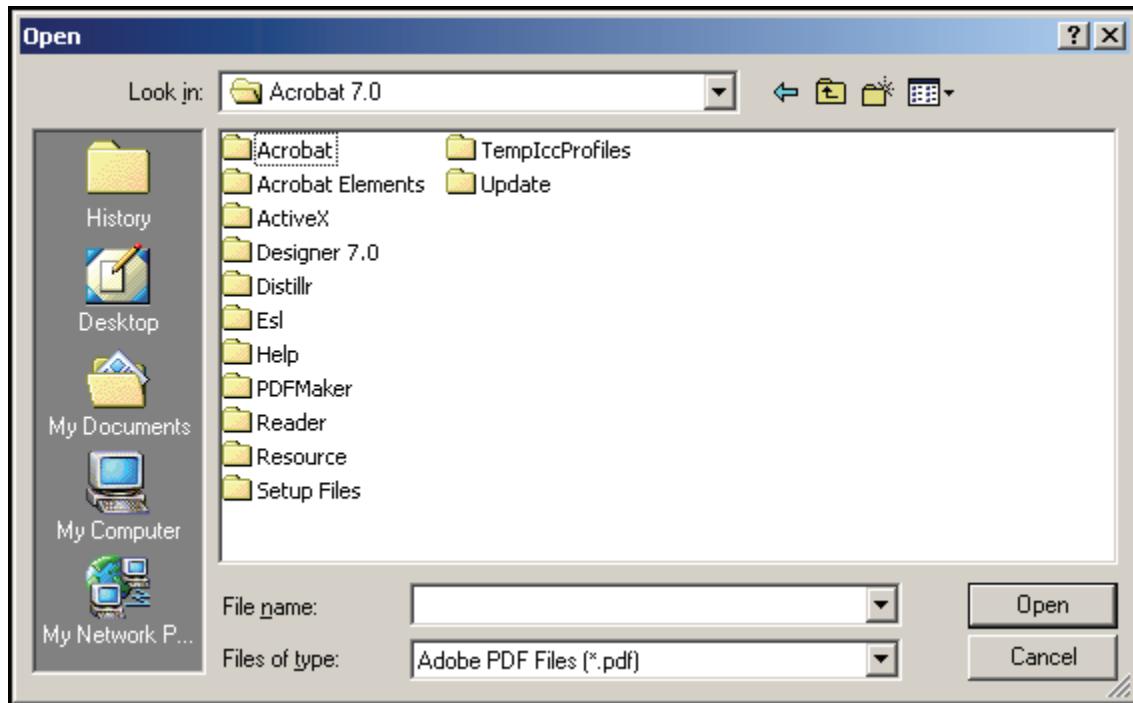
Introduction to Acrobat

Opening a File in Adobe Acrobat

Adobe Acrobat allows you to open any PDF formatted file. Below are the steps to open a file in Adobe Acrobat or, you can also double click on an attached PDF file to open Adobe. Click the Start Menu, choose Programs then Adobe Acrobat Professional and click the name of the program you want to start. You can also double-click the Adobe Acrobat icon on your desktop to start the Acrobat program, or double-click a PDF file icon to start the program with that file open.

Opening a File

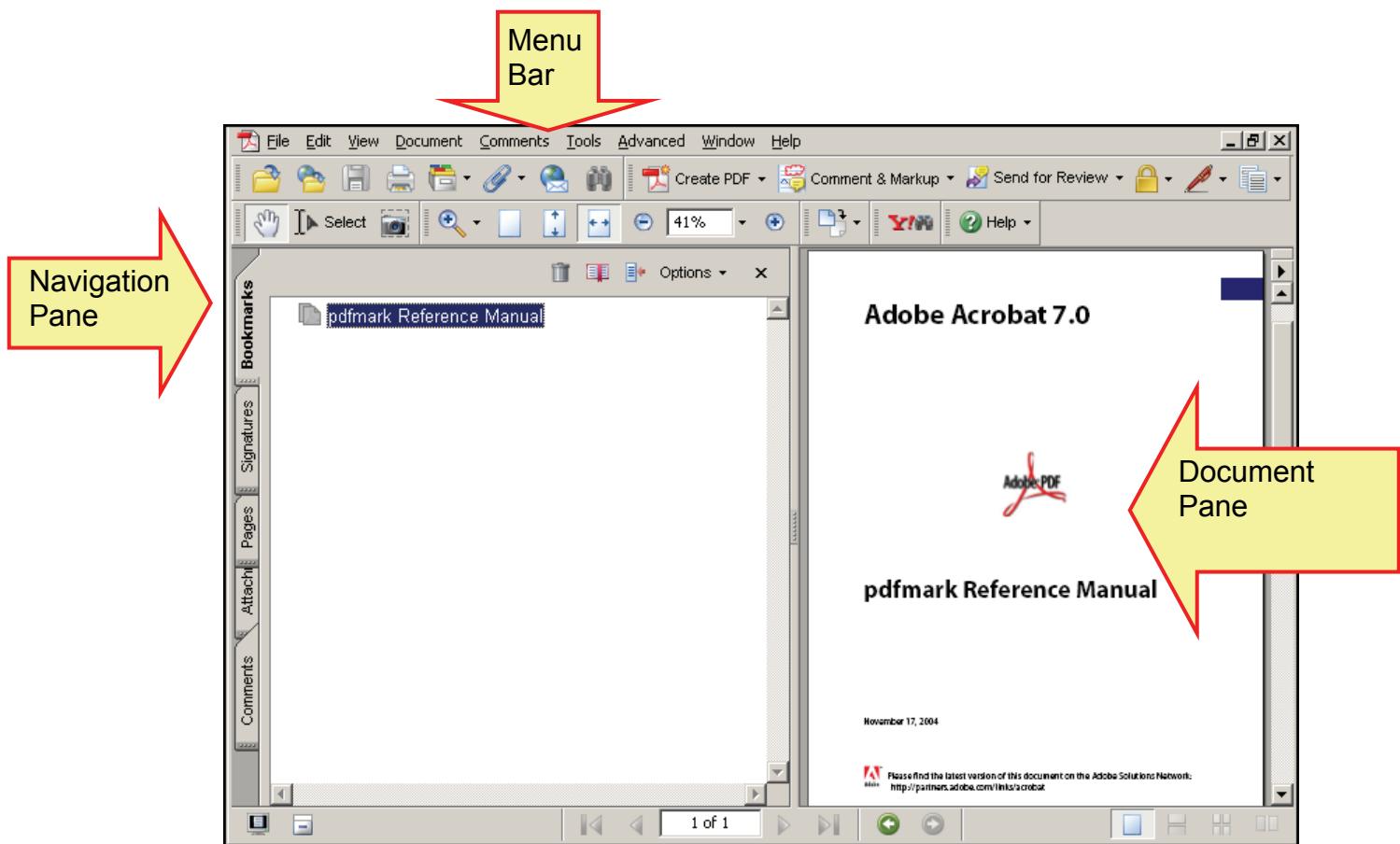
1. Click  or select **File, Open** from the main menu. The **Open** dialog box will appear.



2. Select the appropriate file and click . The file will open in the Adobe Acrobat program window.

Adobe Acrobat Work Area

The Acrobat work area includes a window with document pane, control icons, menu bars, status bars and several toolbars. The *document pane* is used to view PDF documents, and an accompanying *navigation pane* shows bookmarks, signatures, layers, pages and several other navigation elements pertaining to the document. Below is an example of an open document in Acrobat.



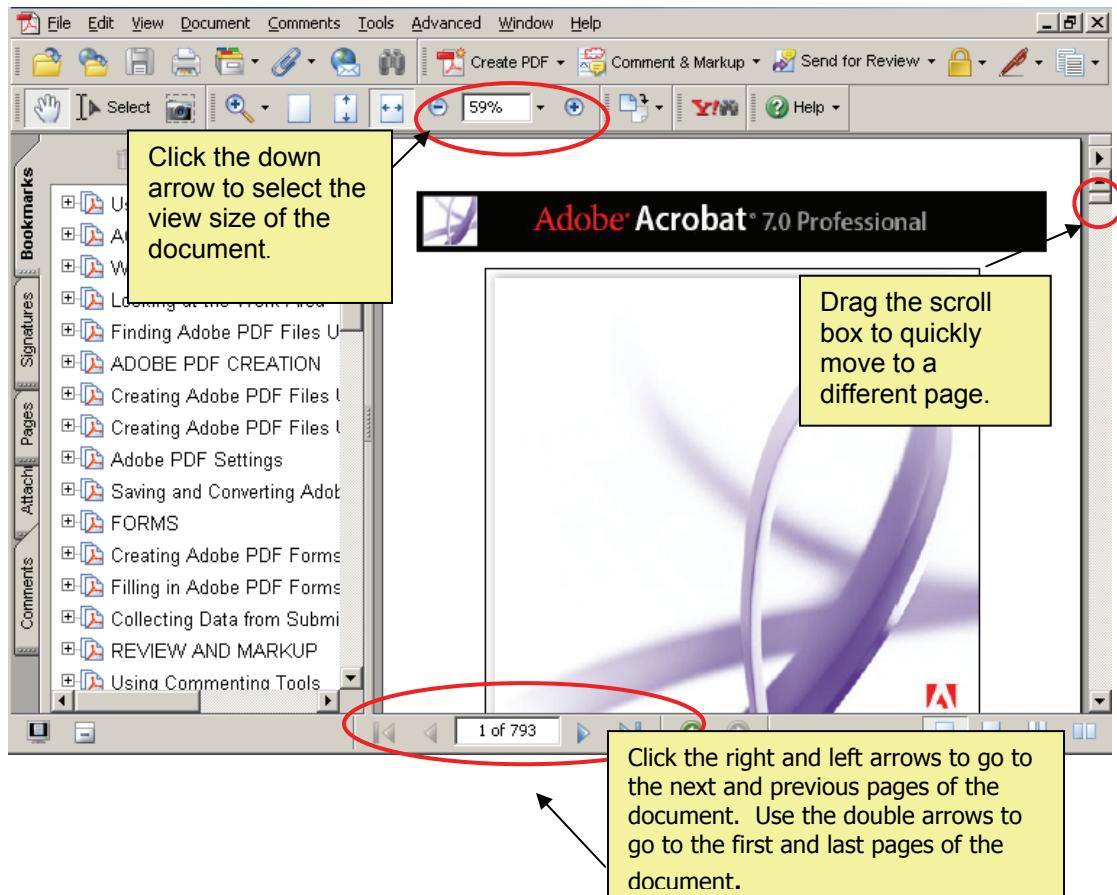
The following table explains each the most commonly used buttons:

Button	Purpose
	Open a PDF file.
	Create PDF from Web Page.
	Save the file currently in the Adobe Acrobat program window.
	Print the file currently open in the Adobe Acrobat program window.
	Navigates to the first page of the document currently open in the Adobe Acrobat program window.
	Navigates to the previous page of the document currently open in the Adobe Acrobat program window.
	Navigates to the next page of the document currently open in the Adobe Acrobat program window.
	Navigates to the last page of the document currently open in the Adobe Acrobat program window.
	Navigates to the previous view you had displayed in the Adobe Acrobat program window.
	Navigates to the next view available in the Adobe Acrobat program window.
	Displays the document in actual size in the Adobe Acrobat program window.
	Shrinks the document to display the entire page in the Adobe Acrobat program window.
	Displays the document width to fit the Adobe Acrobat program window but you must scroll to see the full length of the document.

	Find a word or phrase in the current document open in the Adobe Acrobat program window.
	Navigate through the document testing hyperlinks, inserted items, etc by clicking on them.
	Zoom in on a portion of the current document open in the Adobe Acrobat program window.
	Touch up text in the current document open in the Adobe Acrobat program window.
	Crop a portion of the current document open in the Adobe Acrobat program window.
	Add a note to the current document open in the Adobe Acrobat program window.
	Write directly on the current document open in the Adobe Acrobat program window.
	Highlight a portion of the current document open in the Adobe Acrobat program window.
	Insert a movie file on the current document open in the Adobe Acrobat program window.
	Create a hyperlink on the current document open in the Adobe Acrobat program window.
	Identify article properties for a portion of the current document open in the Adobe Acrobat program window.
	Insert a digital signature on the current document open in the Adobe Acrobat program window.
	Select the text on the current document open in the Adobe Acrobat program window.

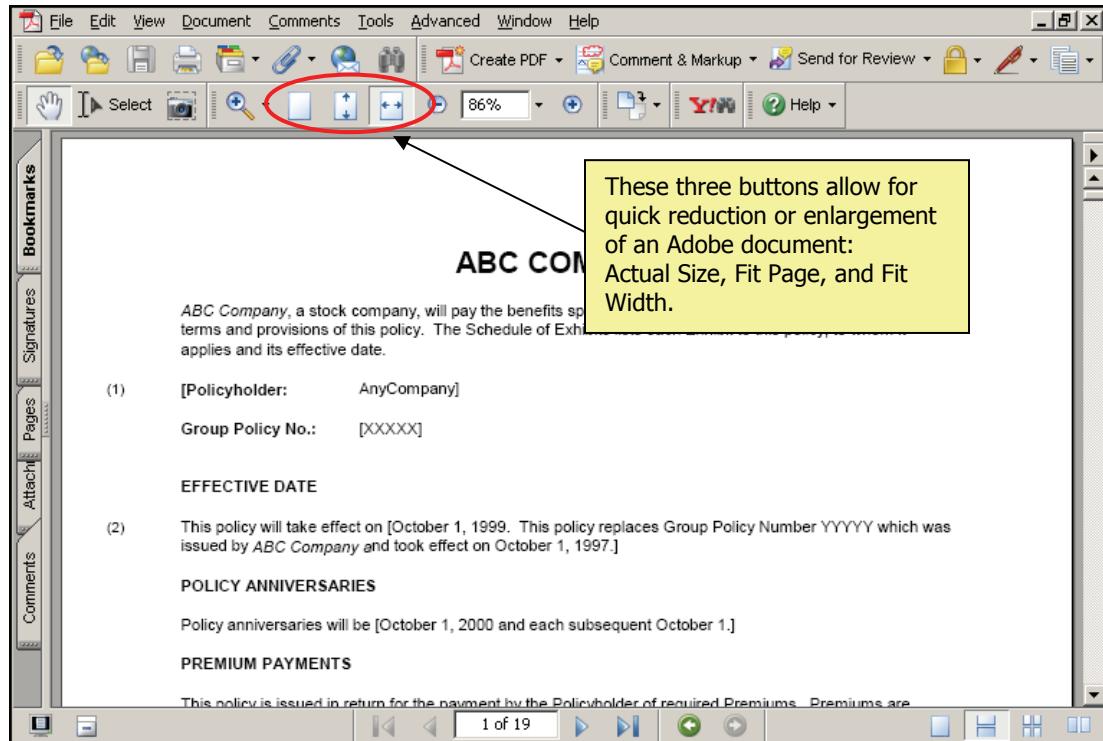
Navigate an Acrobat Document

Use the following areas of the Acrobat screen to help you navigate through multi-page documents.



Navigation Toolbar Buttons

There are quick navigation buttons available on the toolbar within Adobe. These buttons will help you navigate quickly through any large documents you may be reviewing.



Using Adobe Acrobat Help

The help file in Adobe Acrobat contains information on what the program can do, how to perform functions in the program, and why you would use certain things in the program. Below are the steps to use the Adobe Acrobat Help file:

1. To open the help file and look through the bookmarks in the file, select the main menu item Help, Complete Acrobat 7.0 Help. This will display the help file and a list of bookmarks in the navigation pane on the left side of the screen.



2. To see sub-topics of a bookmark, click the -button to the left of the bookmark. This will expand the sub-topic list.
3. To search the help file for a particular word or phrase, click the **Search** tab.

Using Bookmarks in an Acrobat File

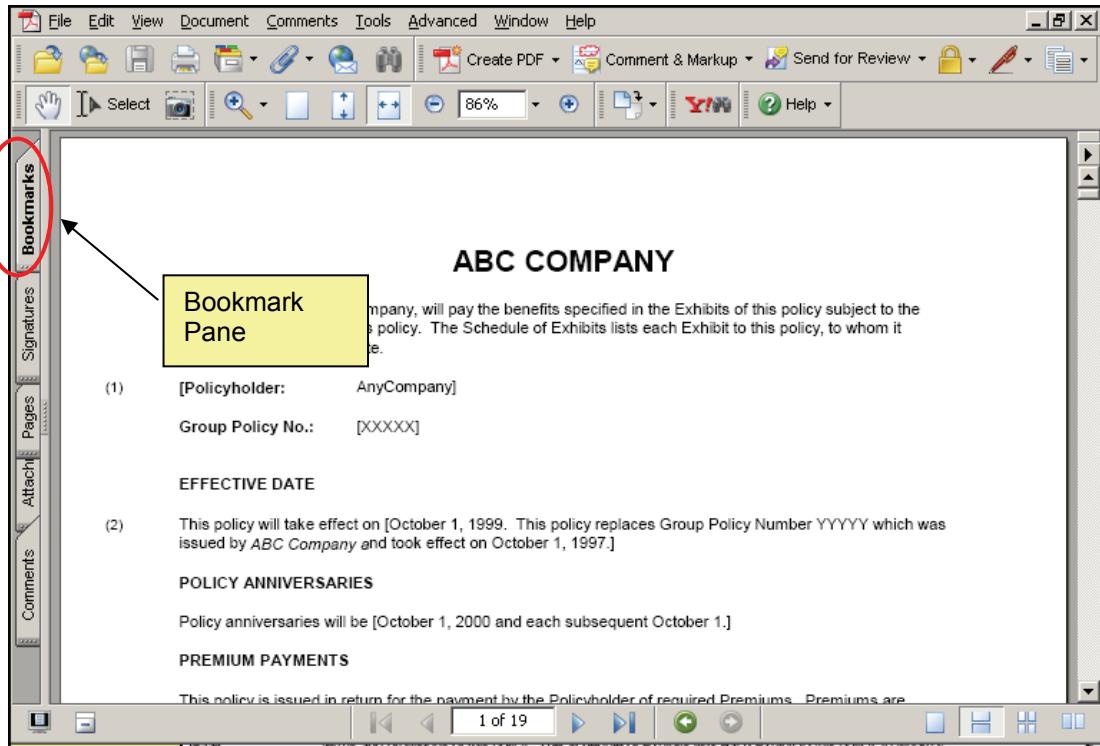
Bookmarks are electronic links within an Adobe Acrobat document. If a document is originally created in a word processing program and has a table of contents, when it is

converted to an Acrobat document, bookmarks are automatically created from the table of contents. In addition, you can add your own bookmarks to an Acrobat document, similar to paper bookmarks, and mark parts of documents that you often return to. Bookmarks can also be used as an outline for a lengthy document.

Many of the documents you will work with in Adobe Acrobat will contain bookmarks in them. Use the following steps to navigate the bookmarks of an Acrobat file:

Bookmarks

1. Open the appropriate file in Adobe Acrobat.
2. Select **View, Navigation Tabs, Bookmarks**, from the menu bar if the Bookmark pane is not already open.



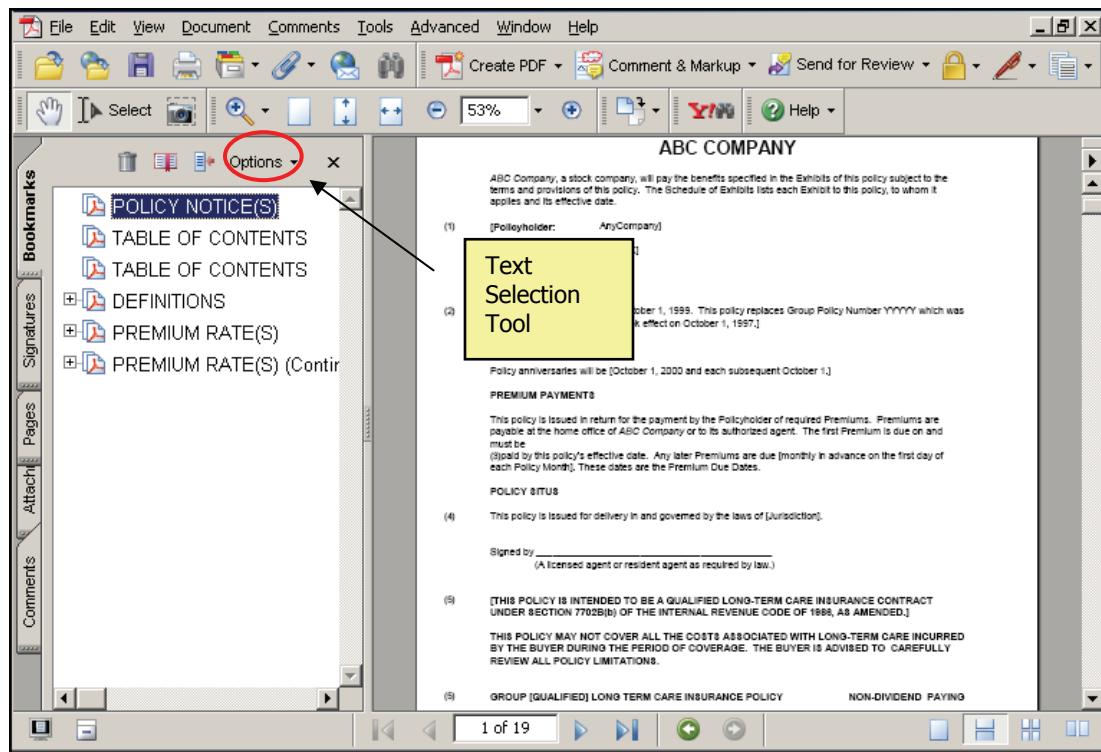
3. Expand the main level in the list by clicking the  to the left of the title.

4. Click on the Subtitle name. The view pane will display that portion of the document.

Adding Bookmarks

Bookmarks allow you to move quickly to important parts of documents. Below are the steps to add bookmarks to an acrobat file:

1. Open the appropriate document in the Adobe Acrobat program window.
2. If the bookmark window is not open, click on the 'Bookmarks' tab.

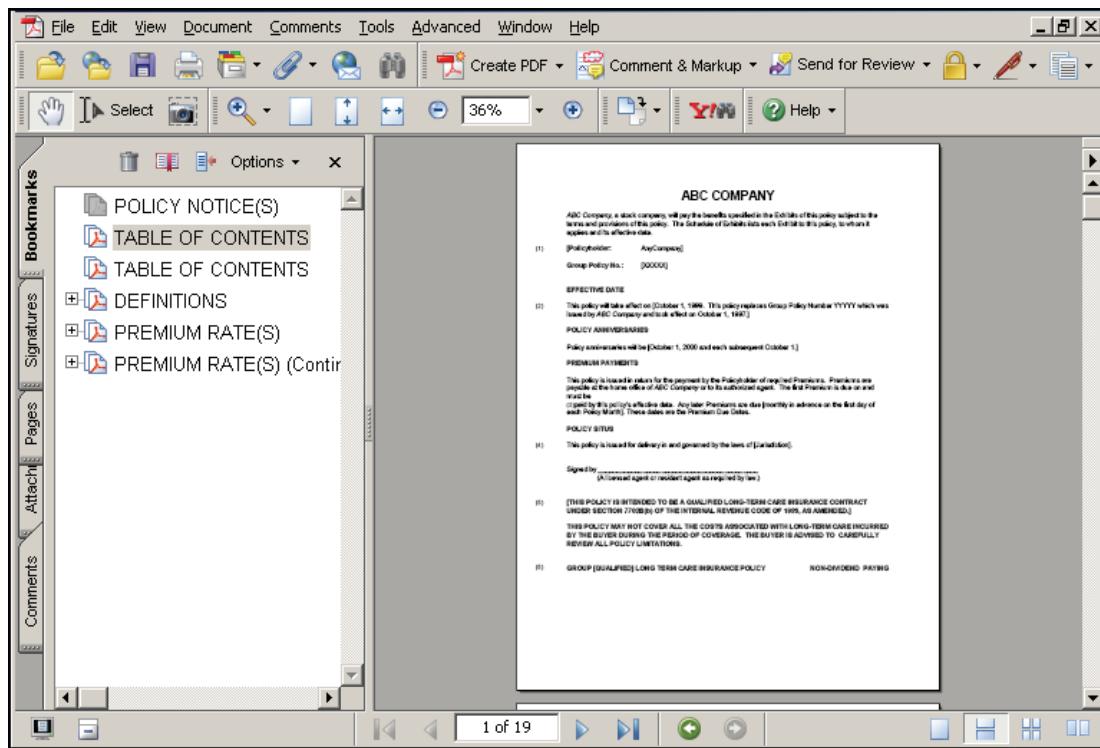


3. Click the **Text Selection Tool** button  on the left toolbar.
4. Click and drag to highlight the text you would like for the bookmark title. This is usually a portion of the first sentence of the area you want book marked.
5. Right mouse click on the highlighted text and select **Add Bookmark** from the shortcut menu. A bookmark with the highlighted text as the title will appear in the bookmark pane.

Renaming a Bookmark Title

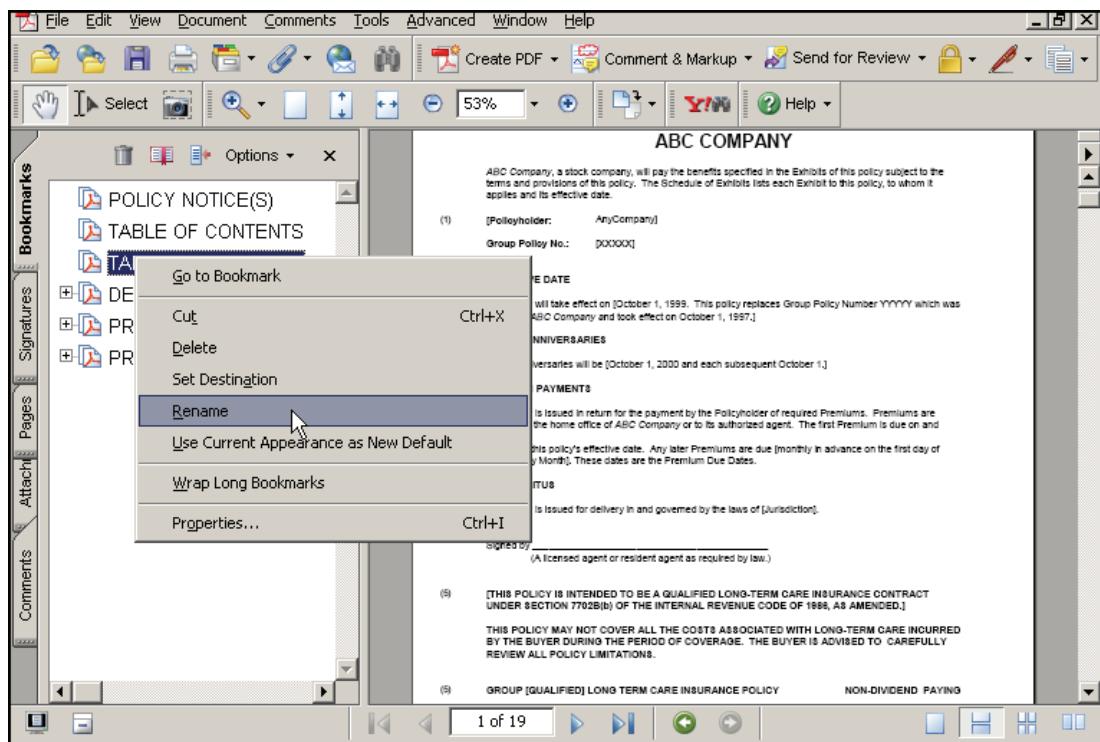
Bookmark titles are generally a section header or a few words in an important sentence. Once the bookmark has been established to point to a certain part of the document, you can change the bookmark title to something more descriptive and it will not affect the document text.

1. Open the appropriate document in the Adobe Acrobat program window. Be sure the bookmark pane is also open.



2. Right mouse click on the title of a bookmark in the bookmark pane. A shortcut menu will appear.

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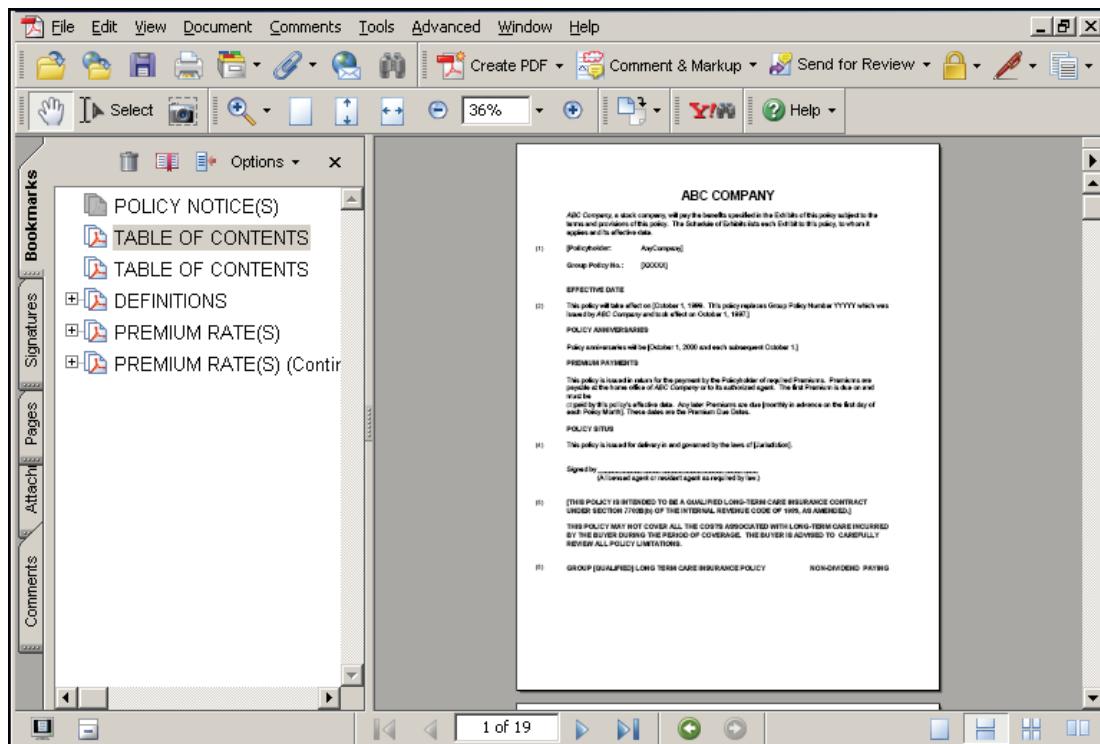


3. Select **Rename** from the shortcut menu.
4. Enter the appropriate text for the Bookmark title. Click the **Enter** key on your keyboard to save the change.

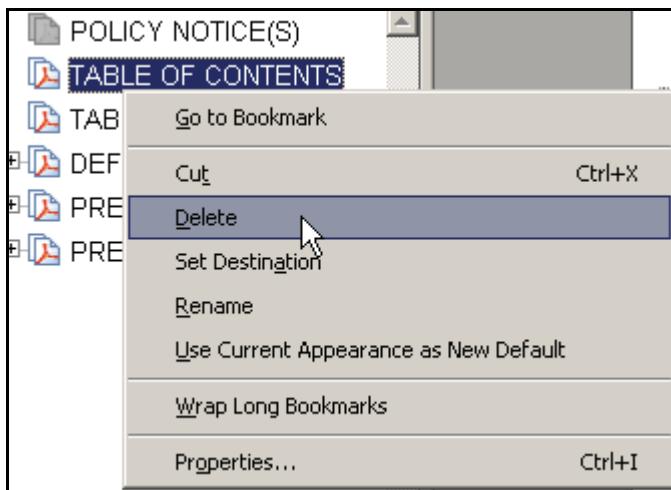
Deleting a Bookmark Title

Deleting bookmarks allows you to keep only the bookmarks you are currently using.

1. Open the appropriate document in the Adobe Acrobat program window. Be sure the bookmark pane is also open.



2. Right mouse click on the title of a bookmark in the bookmark pane. A shortcut menu will appear.

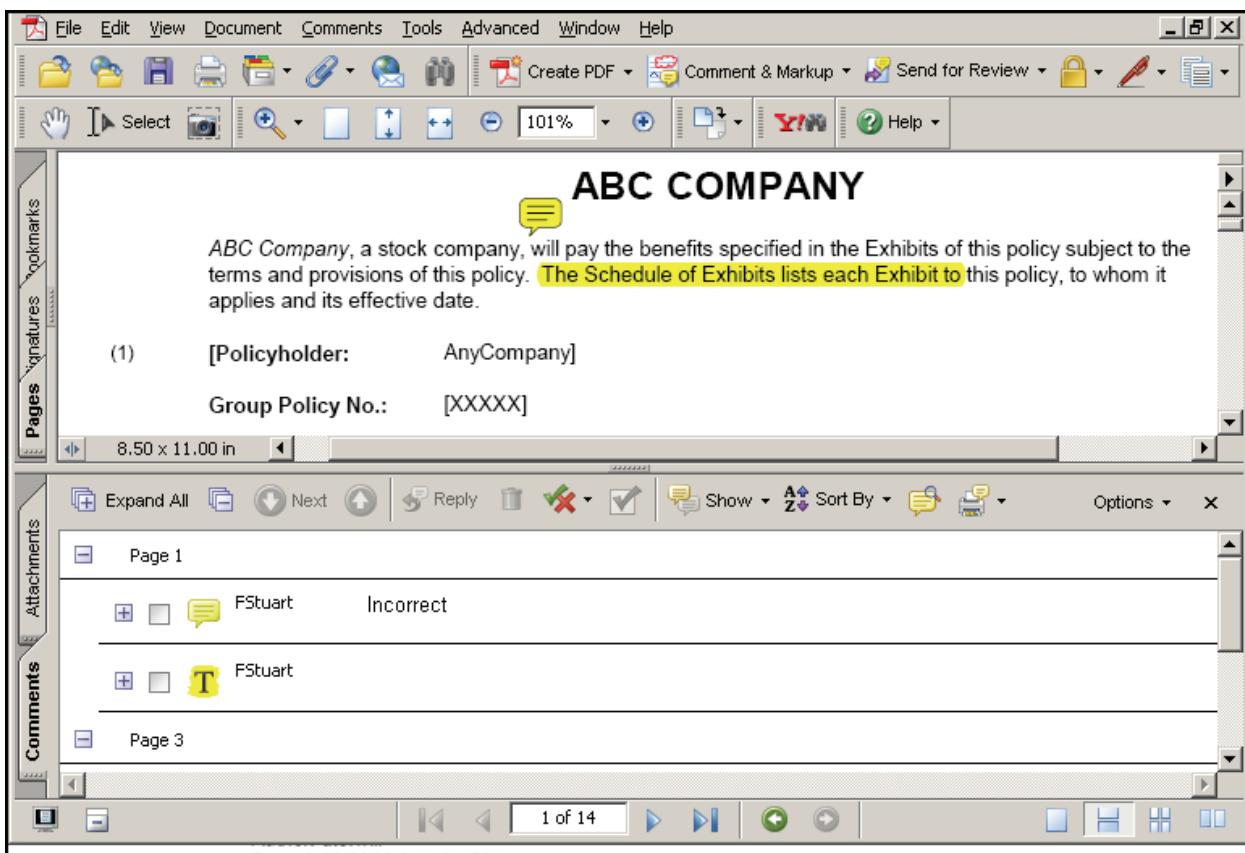


3. Select **Delete** from the shortcut menu.
4. Select **File, Save** from the main menu or click  to save the changes.

Reviewing Comments

You may receive an Acrobat file that contains comments. Use the following steps to review the comments attached to the document:

1. Open the appropriate file in Adobe Acrobat.
2. Select **View, Comments, Show Comments List** from the menu bar if the Bookmark pane is not already open. If the Bookmark pane is open, click on the **Comments** tab.



3. Click on a comment pane. The view pane will display that portion of the document.

4. For a summary list of all annotation notes, select **Document, Summarize**

Comments. Choose a 'layout type'. A summary document will be prepared, listing all annotations in the PDF file. See an example summary document below.

Summary of Comments on Changes to the G-.2130-S policy form

Page: 1

Sequence number: 1

Author: FStuart

Subject: Note

Date: 8/14/2008 4:44:50 PM



Sequence number: 2

Author: FStuart

Subject: Highlight

Date: 8/14/2008 4:44:57 PM



Page: 3

Sequence number: 1

Author: FStuart

Subject: Approved

Date: 8/14/2008 4:45:16 PM



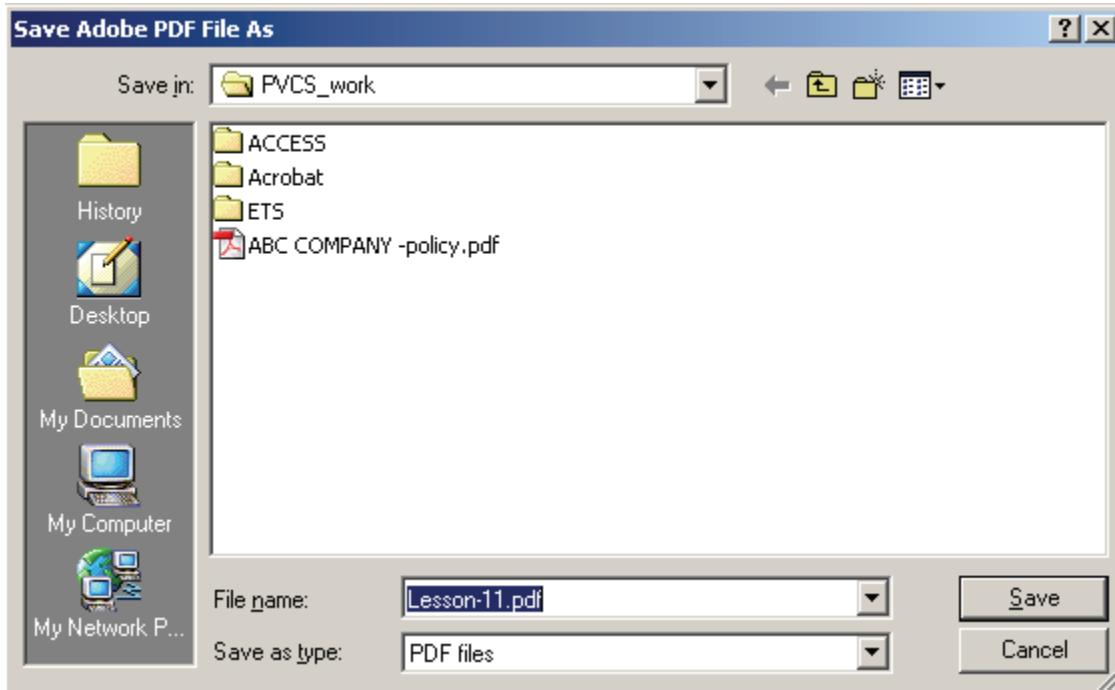
Creating and Editing Acrobat Pages

Adobe Acrobat Professional allows users to convert existing files into a PDF File format. There are a few ways this can be completed, depending on the original file formats. Microsoft applications such as Word, Excel and PowerPoint are easily converted using the Create Adobe PDF toolbar icon. Other applications, other than Microsoft products can also be converted fairly easily. Image files, such as Bitmap's or JPEG's can be converted into an Acrobat file. This lesson contains information about converting a Microsoft document, a non-Microsoft document, and an image file into a PDF Document. This lesson also includes editing an Acrobat file. It covers changing text in a single sentence to deleting entire pages and adding new pages. Adobe Acrobat is not a word processing program; so editing features are not as simple as they are with Microsoft Word or WordPerfect. Remember, the reasons for using Acrobat are file size and the ease of transport through email, not because it is a better word processing program.

Many times the document you would like to submit with your SERFF filing has already been created in a word processing program like WordPerfect or Microsoft Word. Use the following steps to convert a Microsoft Word document to a PDF file. There are similar steps for other word processing programs.

Create an Acrobat File from a Word Processing Program

1. Open the appropriate document in your word processor.
2. Select **Adobe PDF, Convert to Adobe PDF** from the main menu or click  on the toolbar.
3. You will be brought to the **Save PDF file as** dialog box.



4. Enter the appropriate name for the document and click **Save** button.

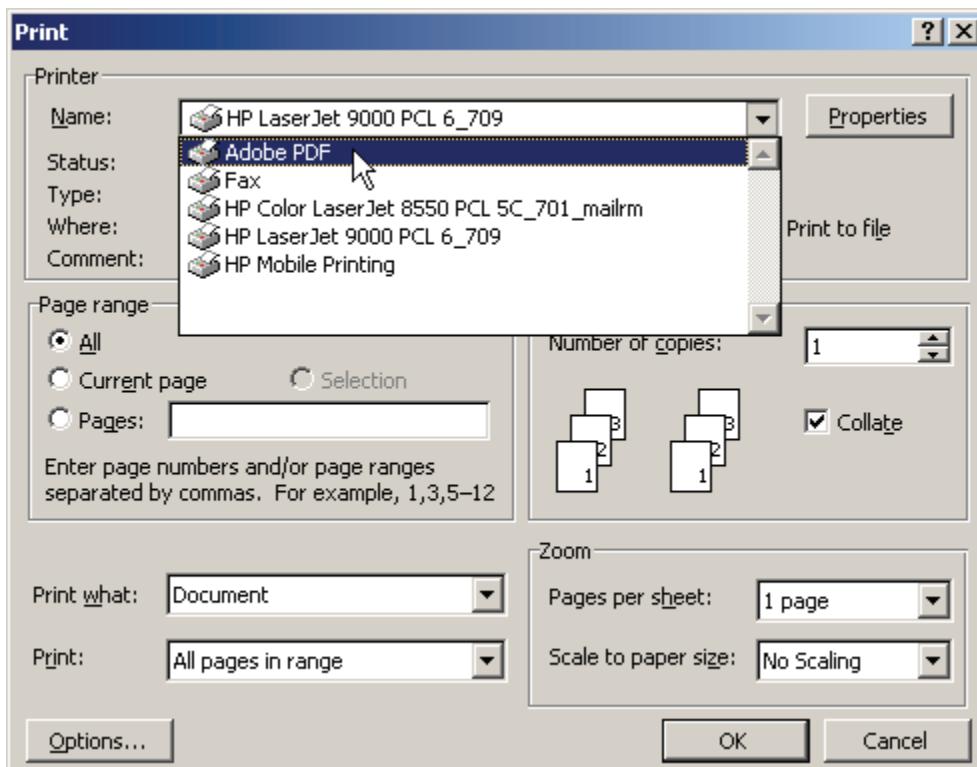
 Note: When you have returned to your word processor program, the file has been created and will be found in the folder you selected during the saving process. Conversion can take a several minutes depending on the size of the document being converted.

Create an Acrobat File from a Word Processing Program (Alternate Method)

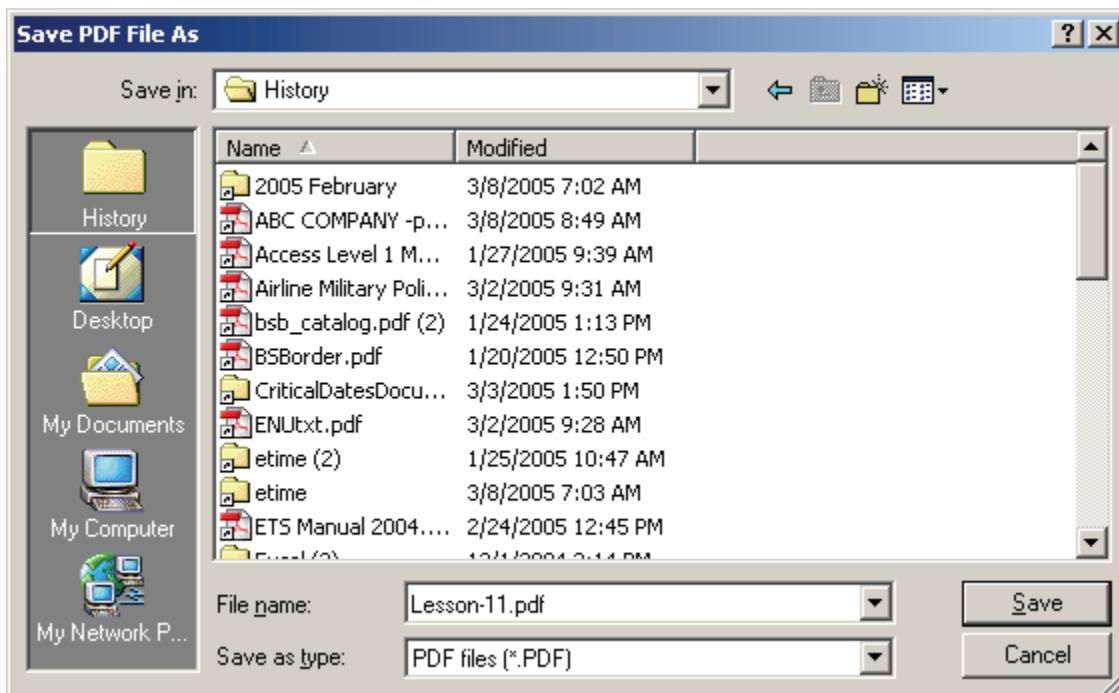
In some word processing programs, the previous method is not available. If that is the case, follow the steps below to use your print dialog box to create an Acrobat file:

Create an Acrobat File

1. Open the appropriate document in your word processor and select **File, Print** from the main menu. The **Print** dialog box appears.



2. Select **Adobe PDF** from the **Name:** field. Click **OK**. The **Save PDF file as** dialog box appears.



3. Enter the appropriate name for the document and click **Save**. When you have returned to your word processor program, the file has been created and will be found in the folder you selected during the saving process.

Using the Drag and Drop Option to convert an image file into an Adobe PDF File Format

If the file is an image, you can convert it to a PDF without opening Adobe or the original document. Drag the image file within the Windows desktop onto the Adobe Acrobat application window. If you drag the image onto the Adobe icon, Acrobat will create a new PDF file for each image; multiple images will be opened into multiple PDF documents. The file name will remain the same, but the file extension will be changed to .pdf.

If you drag the image file onto an already opened Adobe Acrobat file, it will place the image at the end of the document. This might be a useful tool if a state seal needs to be added to a document.

Only image files (such as .gif, jpg, .bmp or .png) can be converted this way. Text documents must be converted using the previous two types of file conversions.

 **Drag and Drop**

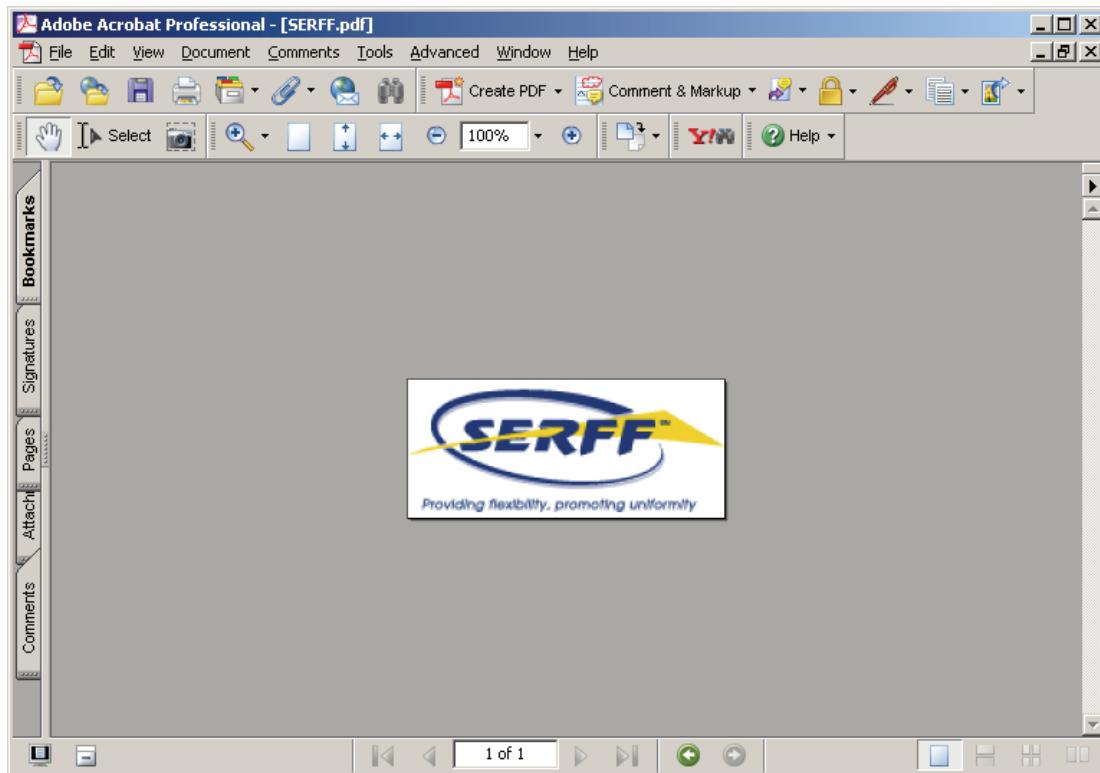
1. Ensure that all applications on the desktop have been minimized.
2. Find the image file that you want to convert to a PDF file format, select the file by single clicking on it and hold your mouse down while you drag it over the Adobe Acrobat desktop icon and release.

 Make sure that you are dragging the file onto the Adobe Acrobat icon and not the Adobe Acrobat Reader icon.)



3. Adobe will automatically convert the image into a PDF file format. (**Note:** the file extension will have been changed to .pdf, but the name of the initial file name will carry over.)

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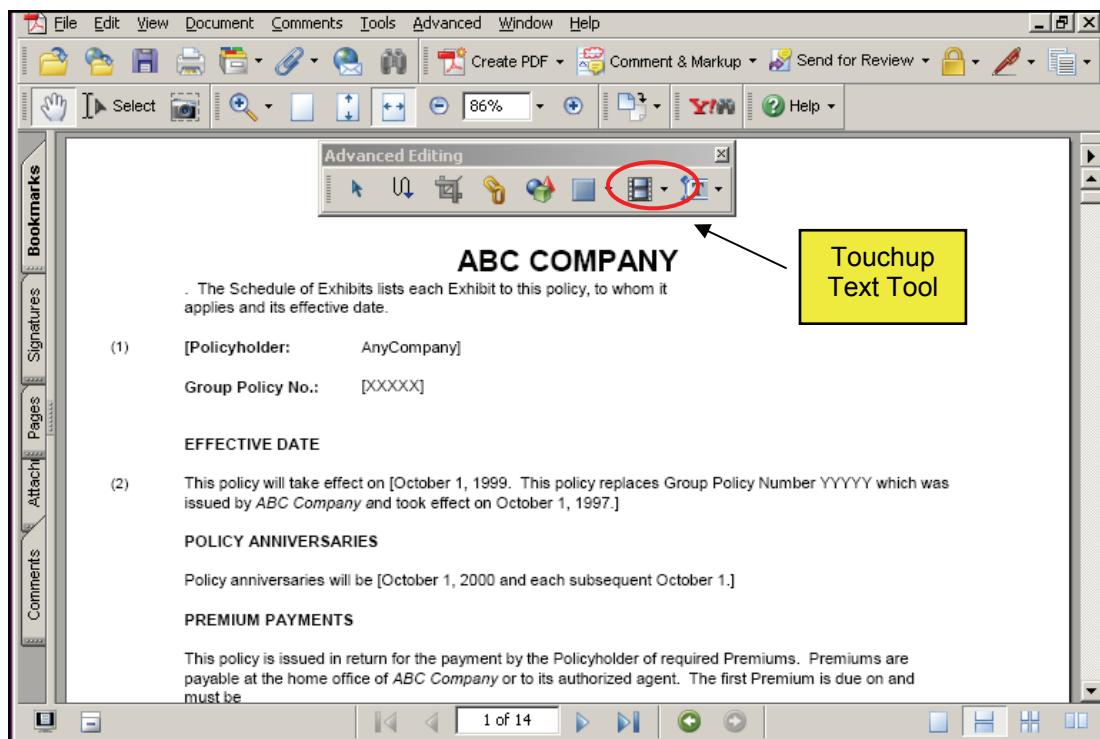
☞ To convert multiple images, select the images using the Ctrl + Click option (to select particular files) or Shift + Click options (to select a range of files), hold down your mouse and release the selected images over the Acrobat shortcut. Each image will be opened into its own PDF file.

Editing Text in an Acrobat Document

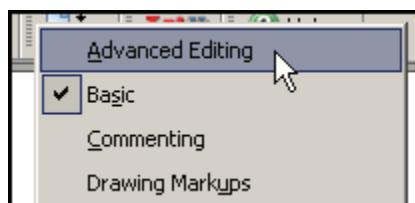
An Adobe Acrobat file is text converted to a compressed graphical format. Therefore, editing text within the document is very restrictive. You may add new text only on a line that currently has text. When you delete an entire line of text, you are left with white space on the page. The text does not move up the page as it does in a word processing program. If you need to make major changes to a document that has been saved as an Adobe Acrobat file, it is better to make the changes in the original word processing version of the document and re-save it as a PDF file again. Below are the steps to edit text in an Adobe Acrobat document.

Editing Text

1. Open the appropriate document in the **Adobe Acrobat** program window.



2. Right Click on the Toolbars to activated the Advanced Editing Toolbar



3. Click the Touchup Text Tool button  from the Advanced Editing Toolbar.
4. Click on the text you would like to edit. A box will appear around the text block with the text highlighted.

ABC COMPANY	
<p>ABC Company, a stock company, will pay the benefits specified in the Exhibits of this policy subject to the terms and provisions of this policy. The Schedule of Exhibits lists each Exhibit to this policy, to whom it applies and its effective date.</p> <p>1) [Policyholder: AnyCompany] Group Policy No.: XXXXXX</p> <p>EFFECTIVE DATE</p> <p>2) This policy will take effect on [October 1, 1998. This policy replaces Group Policy Number YYYYYY which was issued by ABC Company and took effect on October 1, 1997.]</p> <p>POLICY ANNIVERSARIES</p> <p>Policy anniversaries will be [October 1, 2000 and each subsequent October 1.]</p> <p>PREMIUM PAYMENTS</p> <p>This policy is issued in return for the payment by the Policyholder of required Premiums. Premiums are payable at the home office of ABC Company or to its authorized agent. The first Premium is due on and must be paid by this policy's effective date. Any later Premiums are due [monthly in advance on the first day of each Policy Month]. These dates are the Premium Due Dates.</p> <p>POLICY SITUATION</p> <p>4) This policy is issued for delivery in and governed by the laws of [Jurisdiction].</p> <p>Signed by _____ (A licensed agent or resident agent as required by law.)</p> <p>5) [THIS POLICY IS INTENDED TO BE A QUALIFIED LONG-TERM CARE INSURANCE CONTRACT UNDER SECTION 7702B(b) OF THE INTERNAL REVENUE CODE OF 1986, AS AMENDED.]</p> <p>THIS POLICY MAY NOT COVER ALL THE COSTS ASSOCIATED WITH LONG-TERM CARE INCURRED BY THE BUYER DURING THE PERIOD OF COVERAGE. THE BUYER IS ADVISED TO CAREFULLY REVIEW ALL POLICY LIMITATIONS.</p> <p>6) GROUP [QUALIFIED] LONG TERM CARE INSURANCE POLICY NON-DIVIDEND PAYING</p>	

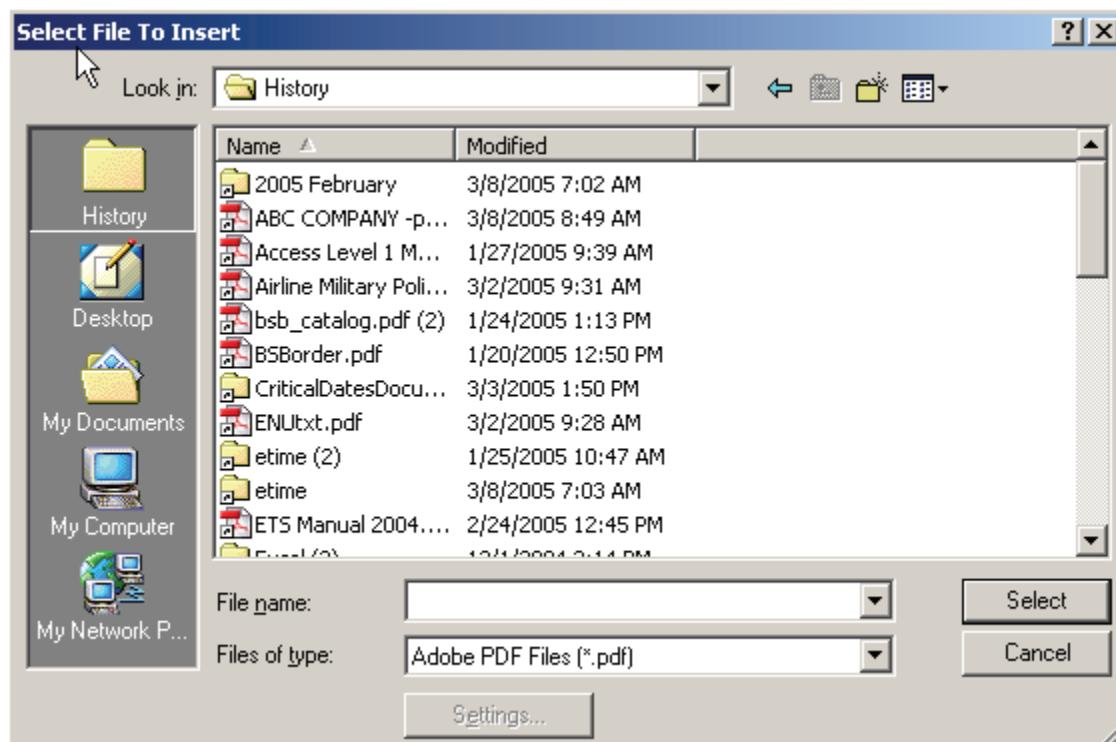
- i. Move the cursor to the appropriate spot using the arrow keys on the keyboard. Use the delete key on the keyboard to **Delete** any text to the right of the cursor and the **Backspace** key to delete any text to the left of the cursor. Enter any new text you would like to add in its place.
- ii. Select **File, Save** from the main menu or click  to save the changes.

Adding Pages to an Acrobat Document

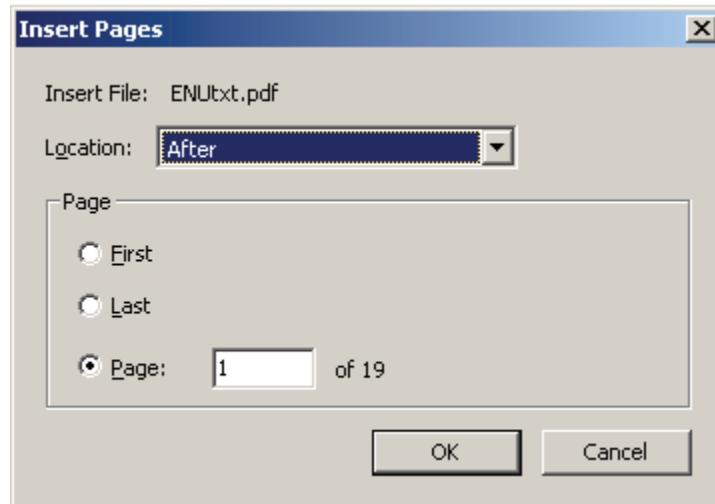
While working on a document in Acrobat, you can insert another file into the current document. If you would like to insert only certain pages from a file, simply save them as their own file.

Adding Pages

1. Open the document to which you would like to add pages in the Adobe Acrobat program window.
2. Select **Document, Pages, Insert** from the main menu. The **Select File to Insert** dialog box appears.



3. Navigate to and select the appropriate PDF file. (You cannot insert a file of any other type.)
4. Click . The **Insert** dialog box will appear.



5. Select the appropriate position for the new file. The pages from the selected file will be inserted into the current document at the location specified.
6. Select **File, Save** from the main menu or click  to save the changes.

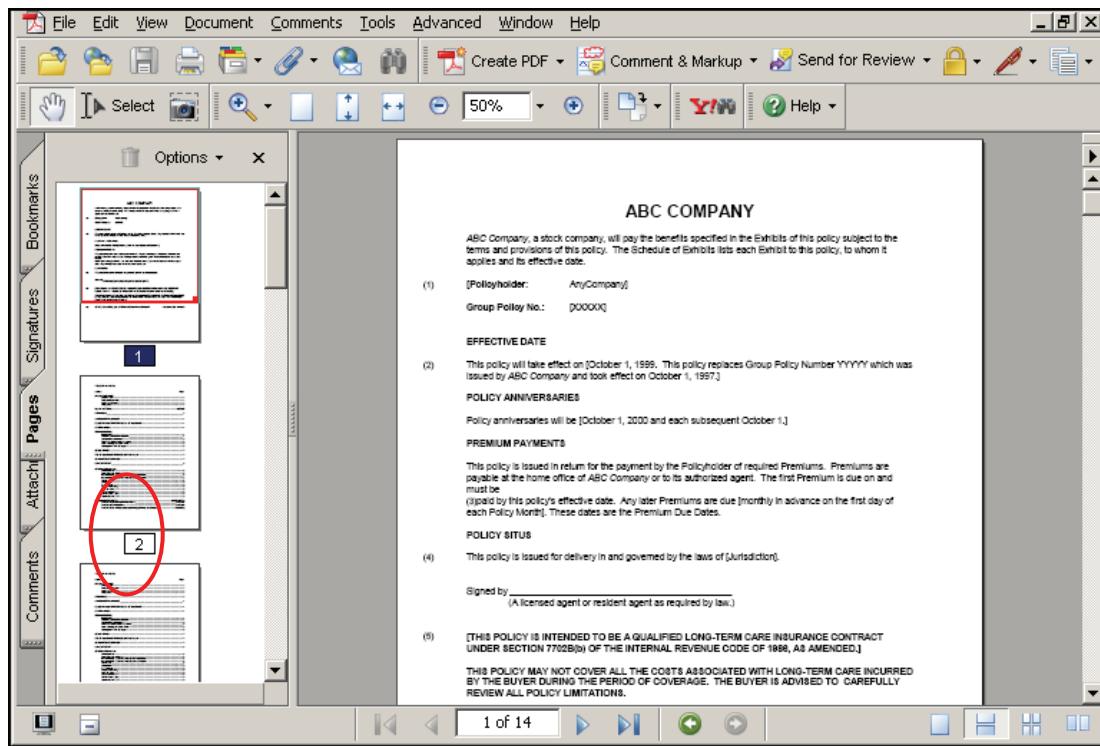
Moving Pages in an Acrobat Document

Adobe Acrobat allows you to rearrange the pages of a document using a simple drag and drop method.

1. Open the appropriate document in the Adobe Acrobat program window.
2. Select the '**Pages**' tab to open the thumbnail pane on the left side of the document.

 This pane can be widened by moving the mouse pointer to the line dividing it and the display pane. The mouse pointer will turn into a double headed arrow. Click and drag to the right to make the pane wider.

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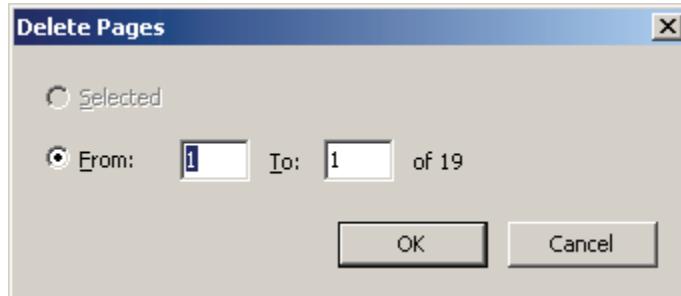


3. Click and drag the appropriate thumbnail page to its new location which is identified by a blue line under the page number. Acrobat will cut the entire page and paste it to the new location.
4. Select **File, Save** from the main menu or click to save the changes.

 **Deleting Pages in an Acrobat Document**

Adobe Acrobat allows you to delete unwanted pages from a document. Below are the steps to delete pages in an Adobe Acrobat document:

1. Open the appropriate document in the Adobe Acrobat program window.
2. Locate the pages you wish to delete from the document. (You will need to know the page numbers.)
3. Select **Document, Pages, Delete** from the main menu. The Delete Pages dialog box appears.



4. Enter the appropriate page numbers and click . The pages will be removed from the document.
5. Select **File, Save** from the main menu or click to save the changes.

Extracting Pages from an Acrobat Document

If you find pages in your document that would be better suited in a document of its own, you can extract them to a new document while at the same time deleting them from the current document. You can also extract pages from a document without deleting them. This may be done to insert these pages into other documents or to let them stand alone as their own document while still retaining them as part of the original document.

1. Open the appropriate document in the Adobe Acrobat program window.
2. Locate the page numbers of the pages you would like to extract.
3. Select **Document, Pages, Extract** from the main menu. The **Extract Pages** dialog box appears.



4. Enter the appropriate page numbers in the dialog box. Select the **Delete Pages After Extracting** checkbox if you would like the pages to be deleted from the original document upon extraction.
5. Click **OK** button. The pages will be extracted to a new document in your Adobe Acrobat program window.
6. Select **File, Save** from the main menu or click  to save the new document.
7. Select **File, Close** to close the new document and return to the original document.
8. Select **File, Save** from the main menu or click  to save the changes to the original document.

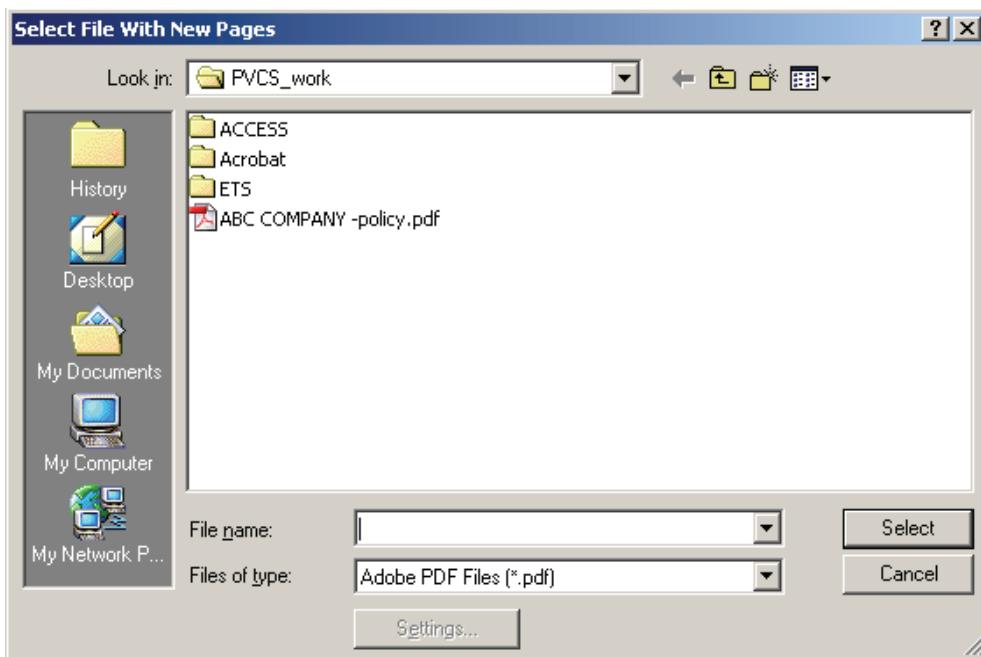
 **Replacing Pages in an Acrobat Document**

Adobe Acrobat allows you to replace pages in a document with another Acrobat file. This is helpful if you have an original document in a word processing program and you saved a copy of it as a PDF file to insert it into another PDF document. Every time you make changes to the original word processing file, you will want to save the changed document as a PDF file and replace the pages in the other document with the new updated information. The only restriction to replacing pages is that the number of pages being replaced and replacing must be the same.

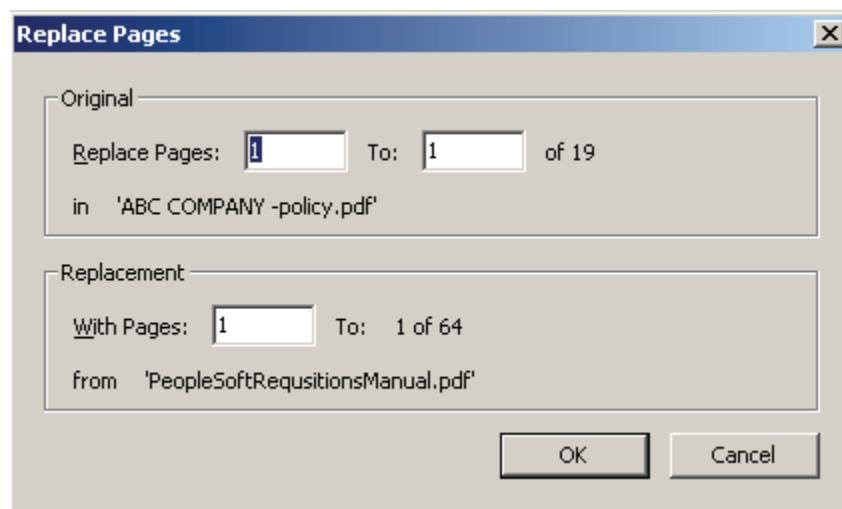
1. Open the document that needs updating in the Adobe Acrobat program window.
2. Locate the page numbers of the pages you would like to replace.
3. Open the document that has the updated information in the Adobe Acrobat program window.
4. Locate the pages numbers of the pages you would like to replace.
5. Select **File, Close** from the main menu to close the document with updated information.

 You cannot insert an open file into another file.

6. Select **Document, Pages, Replace** from the main menu. The **Select File with New Pages** dialog box appears.



7. Select the file with the updated information in it.
8. Click **Select** button. The **Replace Pages** dialog box will appear.



9. Enter the appropriate page numbers from step 2 in the **Original** section of the dialog box.
10. Enter the appropriate page numbers from step 4 in the **Replacement** section of the dialog box.

11. Click **OK** button. The pages from the updated document will replace the appropriate pages in the original document.

Marking Up an Acrobat Document

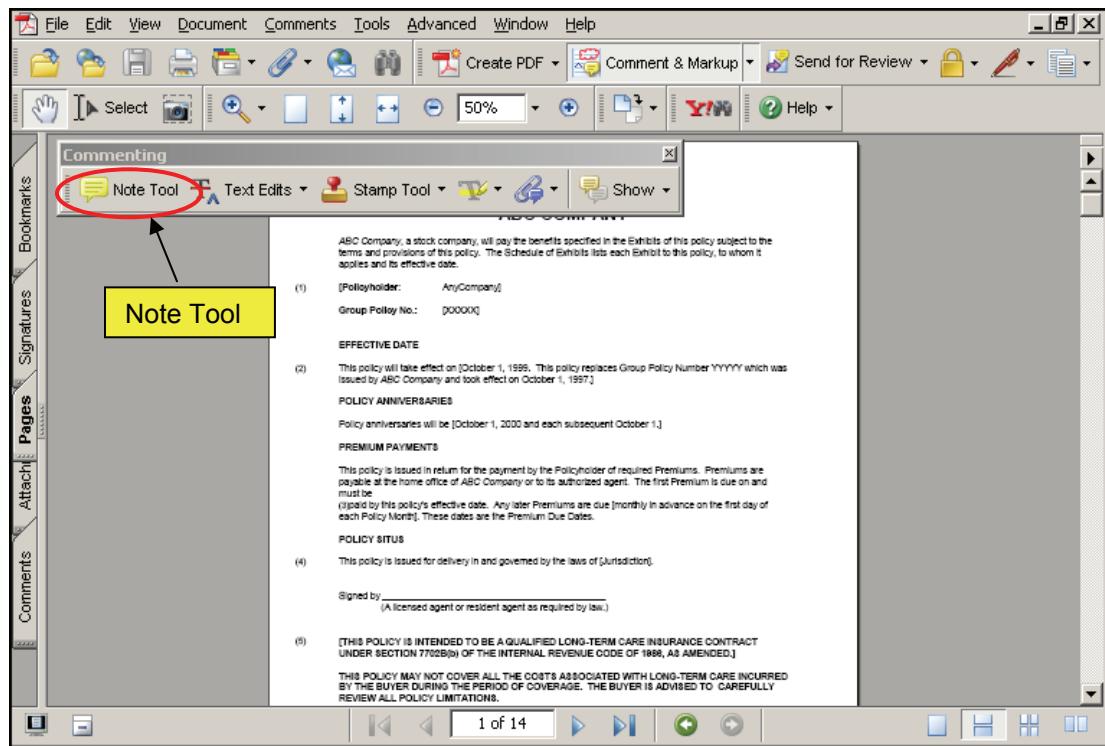
When a state reviewer receives Adobe Acrobat files attached to a filing, it is their job to review the document and make any suggestions directly on the document. They do this through the use of annotations.

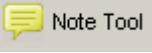
There are many types of annotations in Adobe Acrobat. You can create notes, stamps, highlight, text, etc. In addition to being able to create all of these annotations, both state and industry employees must know how to edit and delete the annotations.

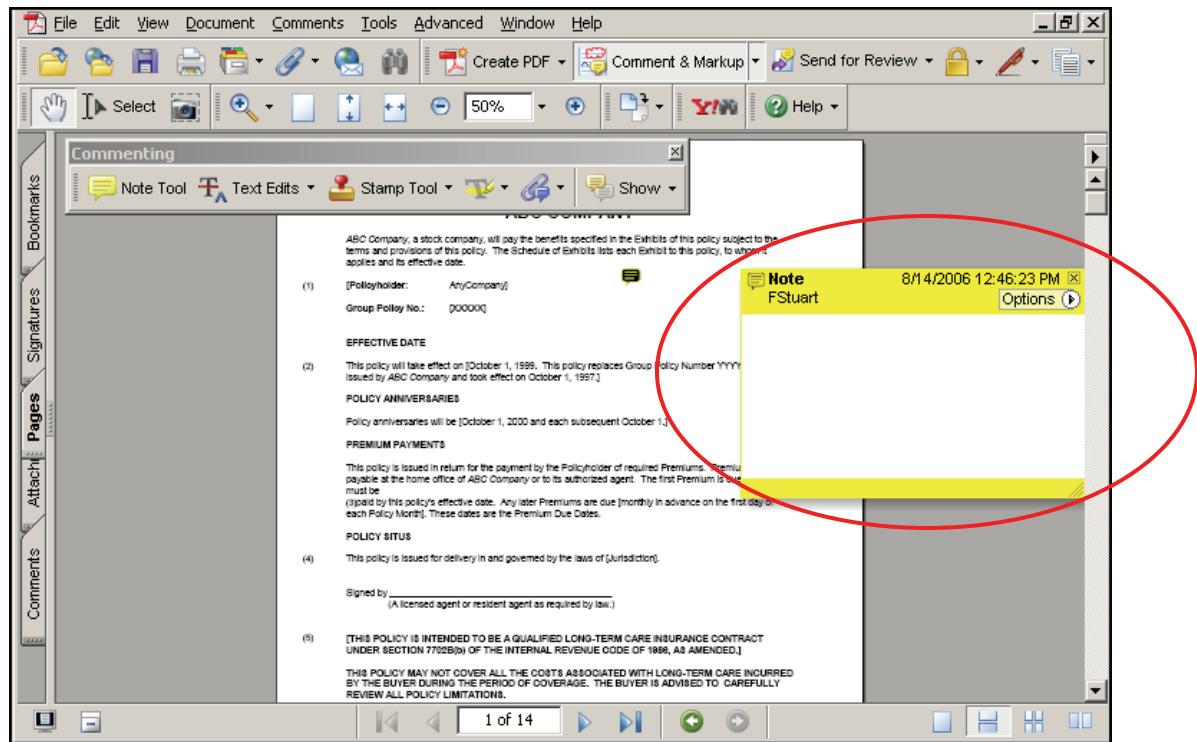
Adding a Note to an Acrobat Document

Notes are similar to the paper post-it notes that we use every day to put reminders or changes on printed documents, except they are electronic and placed on an electronic document.

1. Open the appropriate document in the Adobe Acrobat program window.



2. Click the **Note Tool** button  on the commenting toolbar.
3. Click on the document where you would like the note to appear. A Note box will appear on the document.

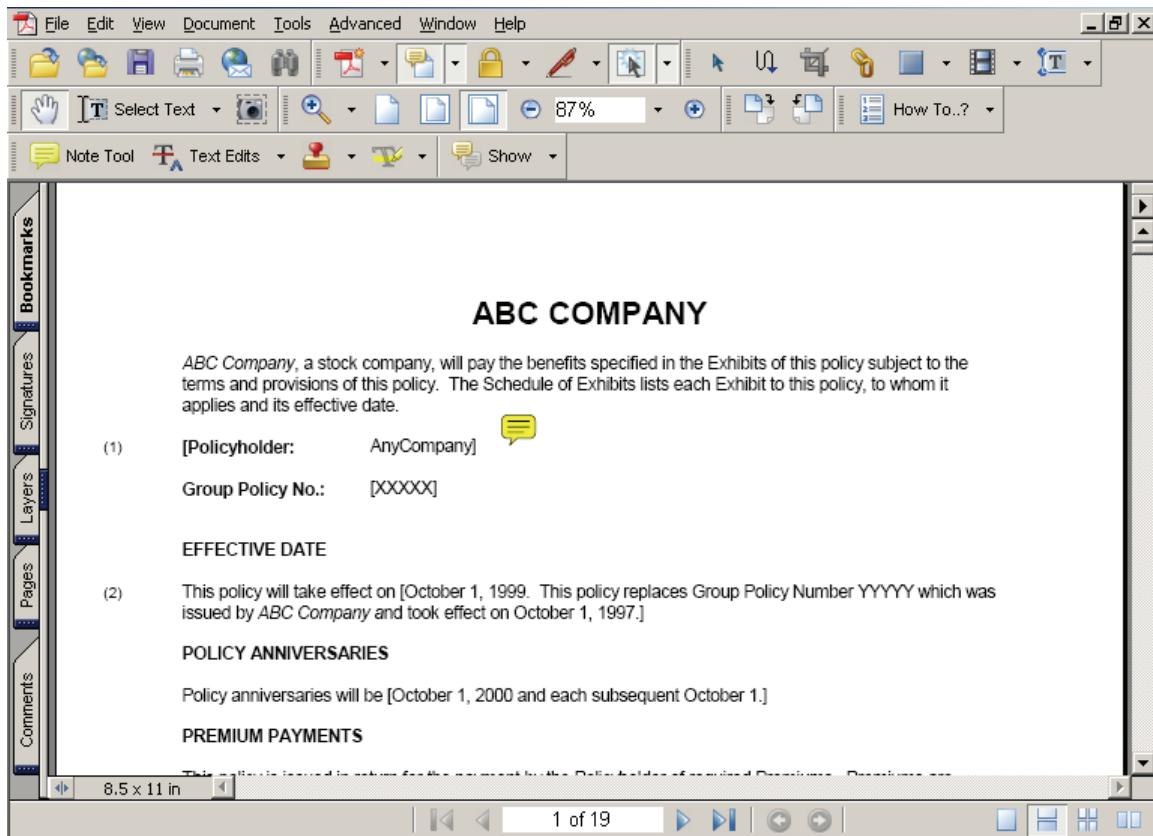


4. Enter the desired text in the note.
5. Click  to close the Note.
6. Click  to turn off the Note feature.
7. The document will contain a  at the location of the note.
8. Select **File, Save** from the main menu or click  to save the changes.

Editing a Note in an Acrobat Document

Acrobat allows you to add, change, or delete part of a note previously created. Use the following steps to edit a note:

1. Open the appropriate document in the Adobe Acrobat program window.

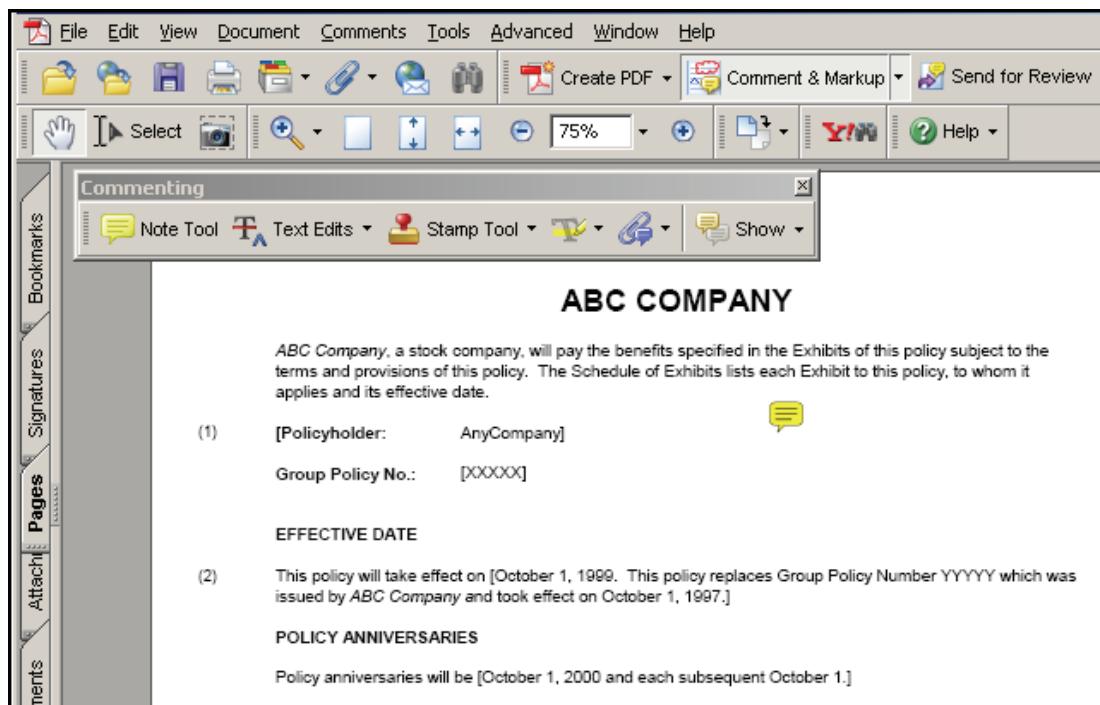


2. Click the  on the document. The note will open.
3. Change the information in the note as desired.
4. Click  to close the Note.
5. Select **File, Save** from the main menu or click  to save the changes.

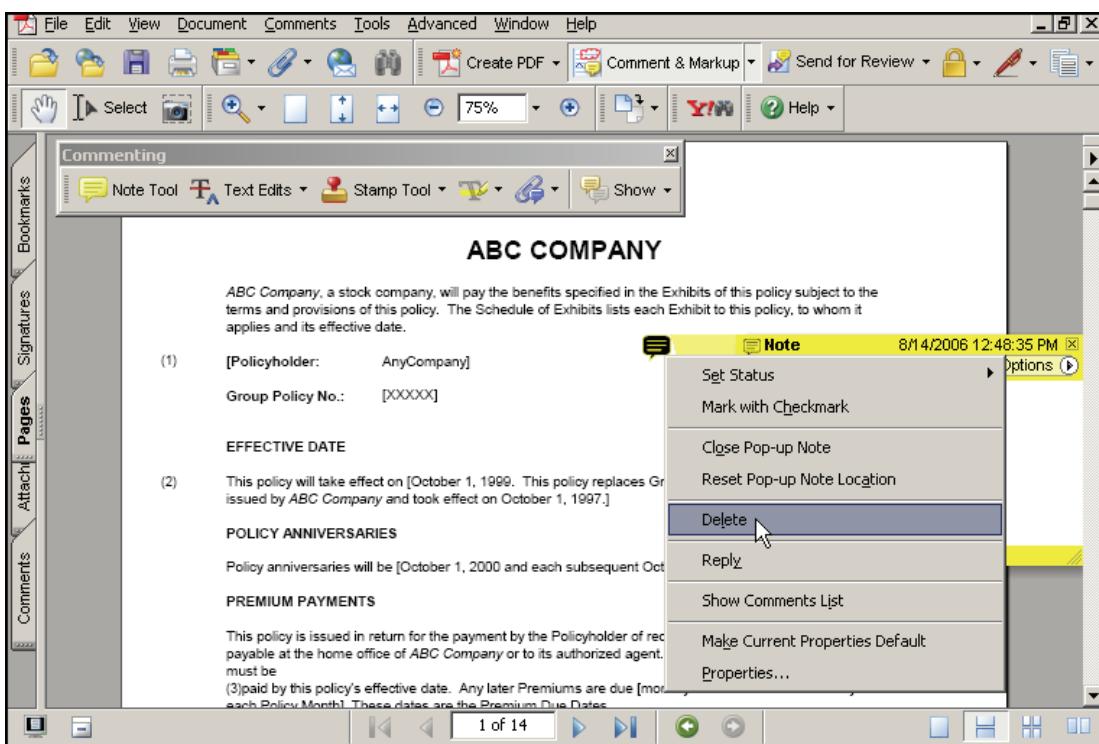
Deleting a Note in an Acrobat Document

Acrobat allows you to add, change, or delete part of a note previously created. Use the following steps to edit a note:

1. Open the appropriate document in the Adobe Acrobat program window.



2. Right mouse click the  on the document. A shortcut menu will appear next to the note icon.

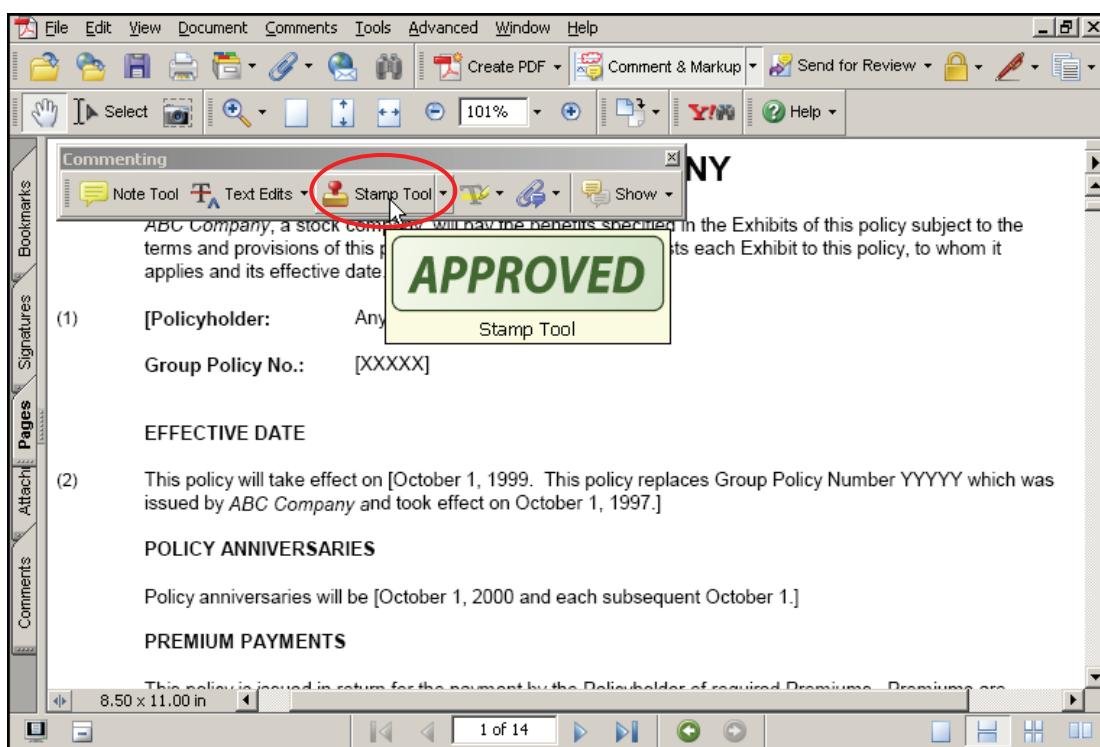


3. Select **Delete** from the menu.
4. The note is deleted from the document.

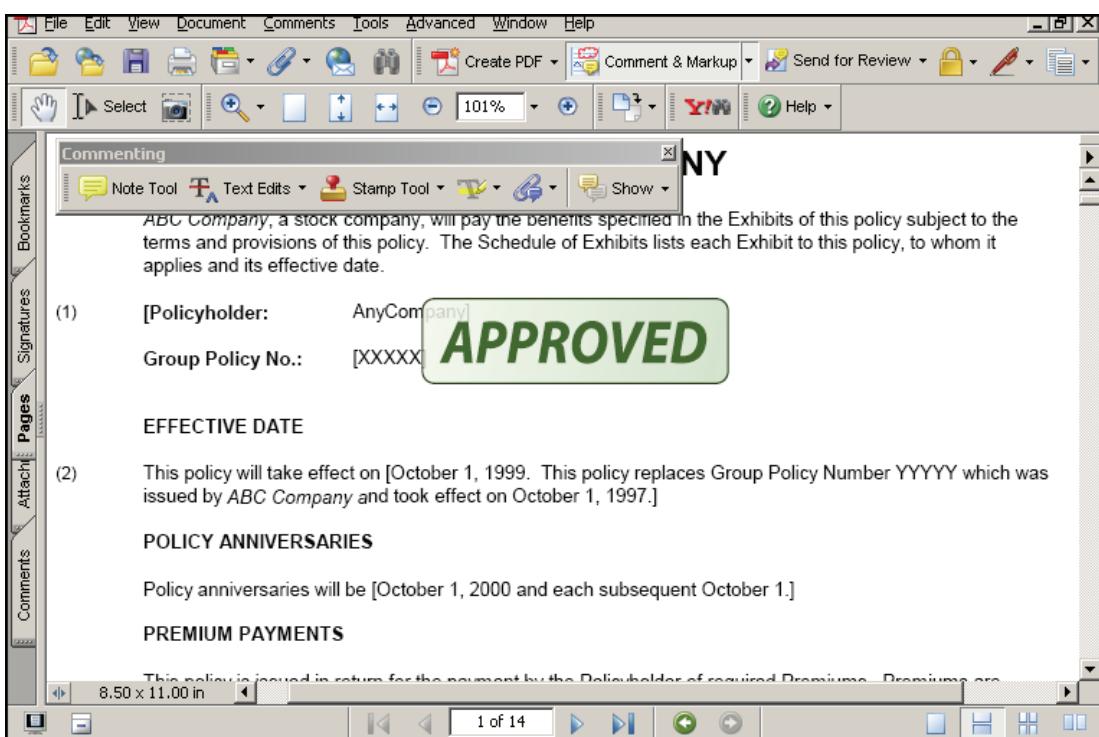
Adding a Stamp to an Acrobat Document

Acrobat allows you to apply a stamp to a document much the same way you would use a rubber stamp on a paper document.

1. Open the appropriate document in the Adobe Acrobat program window.
2. Click on the **Notes Tool**  button. The stamp type will appear.



3. Click the Stamp Tool button . The cursor will turn into the stamp symbol.
4. Click the mouse on the document where you wish the stamp to appear. The **Approved** stamp graphic will appear on the document.

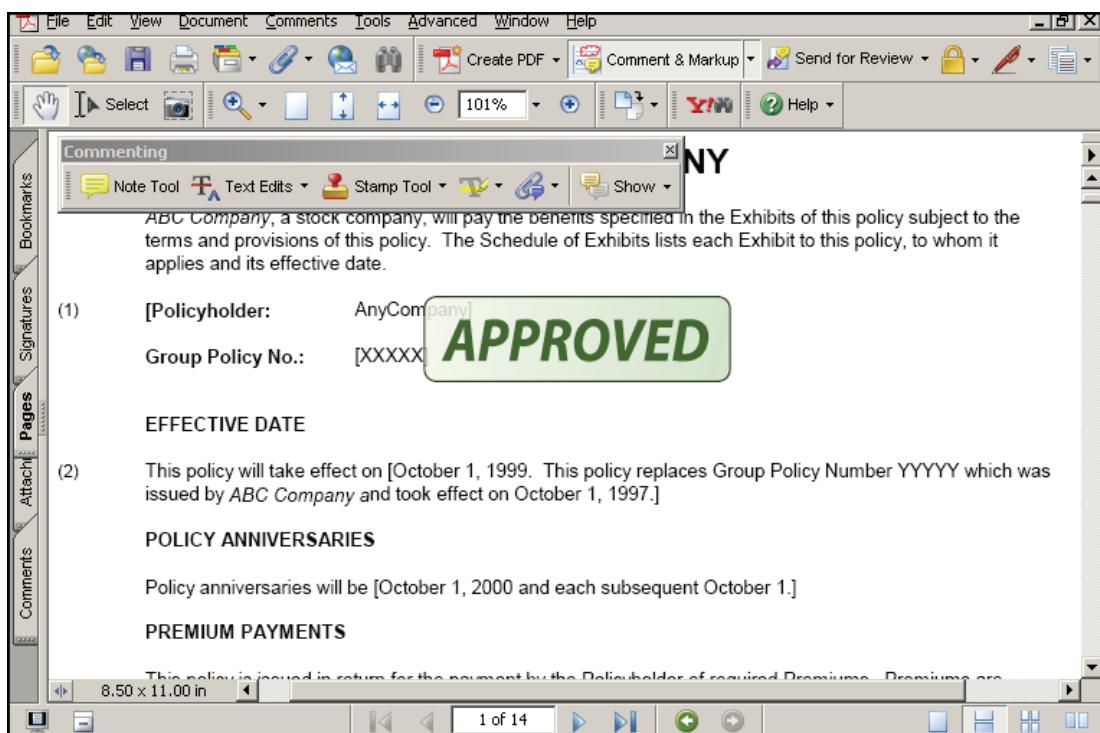


5. Select **File, Save** from the main menu or click  to save the changes.

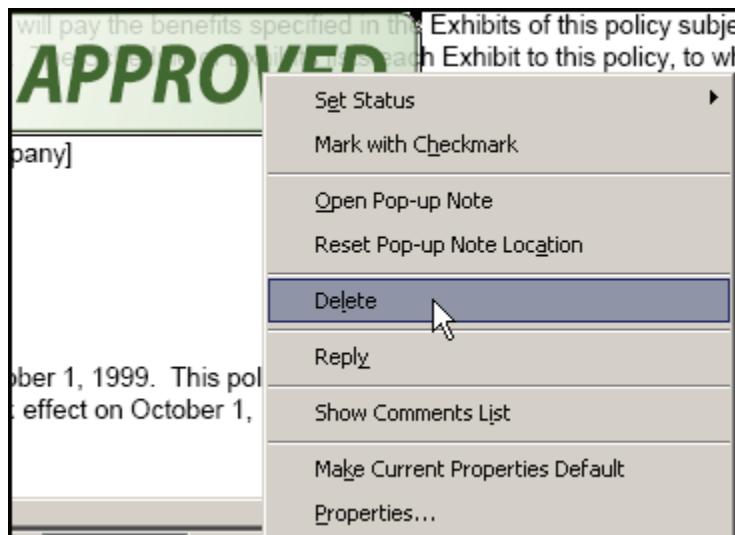
Deleting a Stamp in an Acrobat Document

Acrobat allows you to delete stamps from documents. Use the following steps to delete a stamp:

1. Open the appropriate document in the Adobe Acrobat program window.



2. Right Mouse Click on the stamp graphic. A shortcut menu will appear.

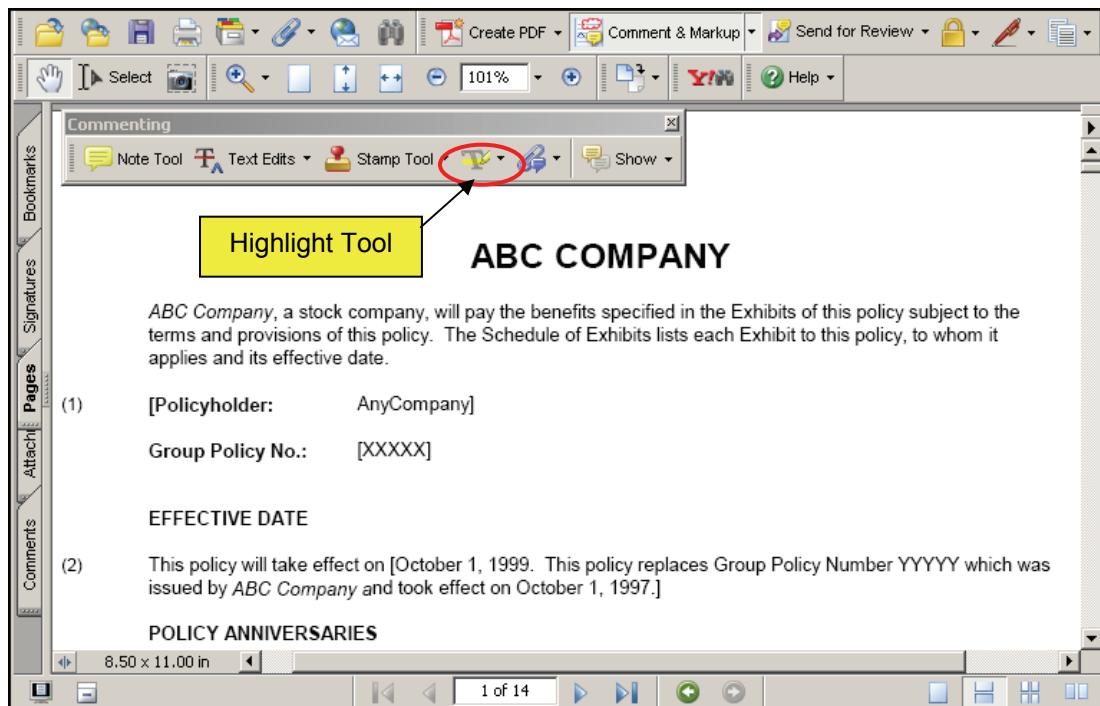


3. Select **Delete** from the menu. The stamp is deleted from the document.
4. Select **File, Save** from the main menu or click  to save the changes.

Highlighting Text in an Acrobat Document

Acrobat has the ability to highlight text just as many of the current word processing programs can. Highlighted text draws attention to the words. This can be very helpful if this document is often read online. The highlighting will only print if you have a color printer.

1. Open the appropriate document in the Adobe Acrobat program window.
2. Click the **Highlight Text Tool** button 



3. Select the text you would like highlighted. The text will be highlighted with a yellow color.

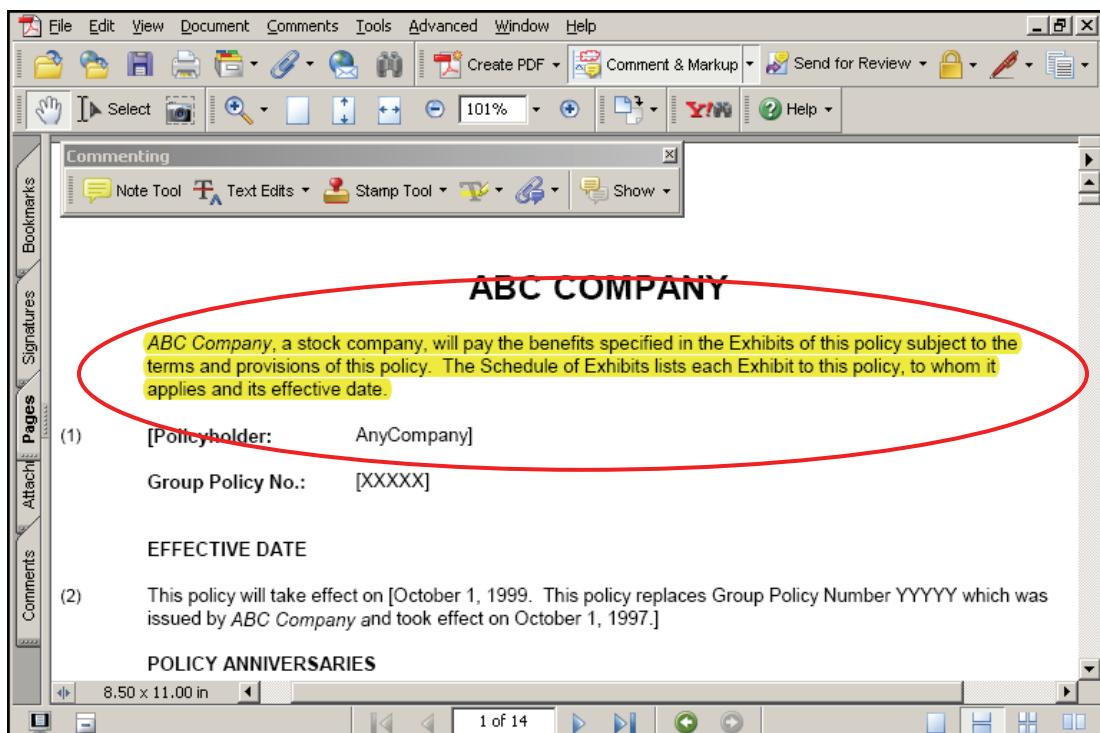
 You may need to click away from the text to see the highlight color.

4. Select **File, Save** from the main menu or click  to save the changes.

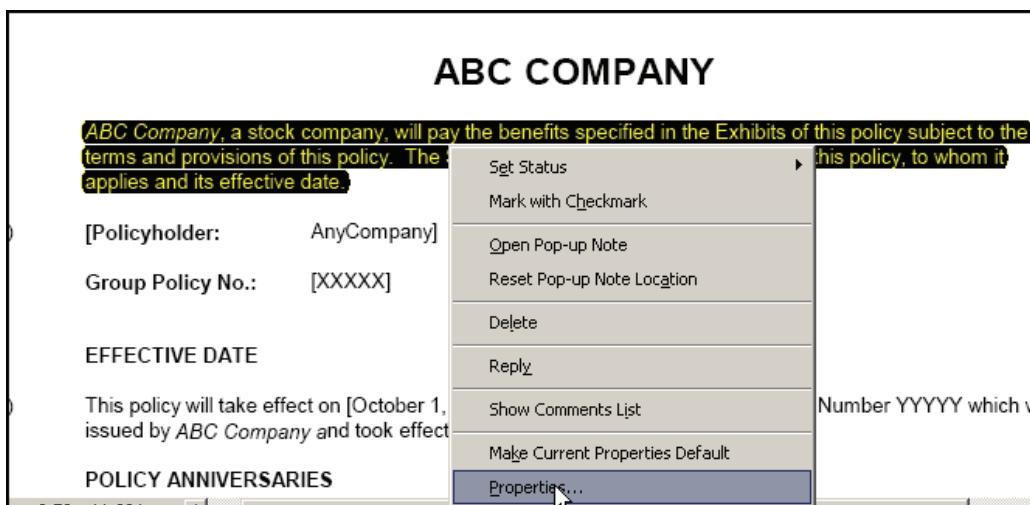
☞ Changing the Highlight Color

The default color for the Acrobat Highlighter is yellow. However you can use multiple colors, or change the color you highlight the text with. Use the following steps to change the highlight color.

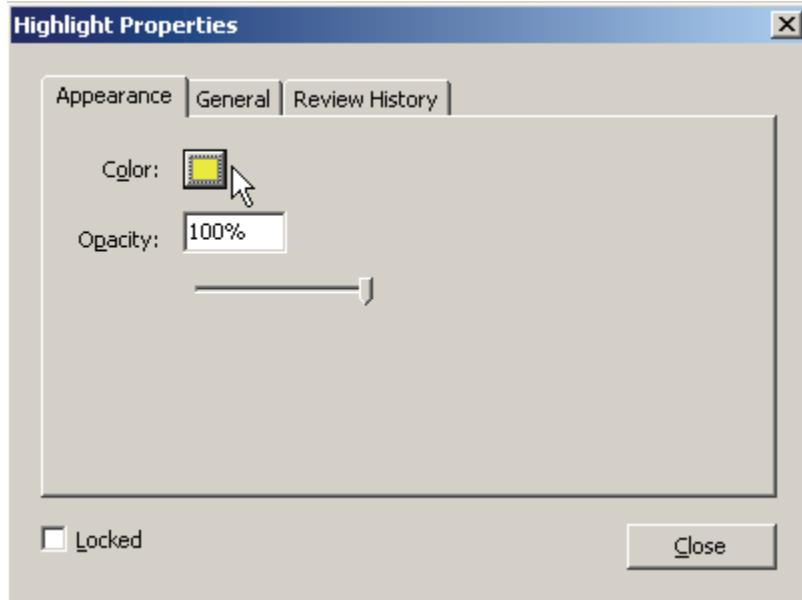
1. Open the appropriate document in the Adobe Acrobat program window.



2. Right mouse click on the highlighted text. A shortcut menu appears.



3. Select **Properties...** from the menu. The **Highlight Properties** dialog box will open.



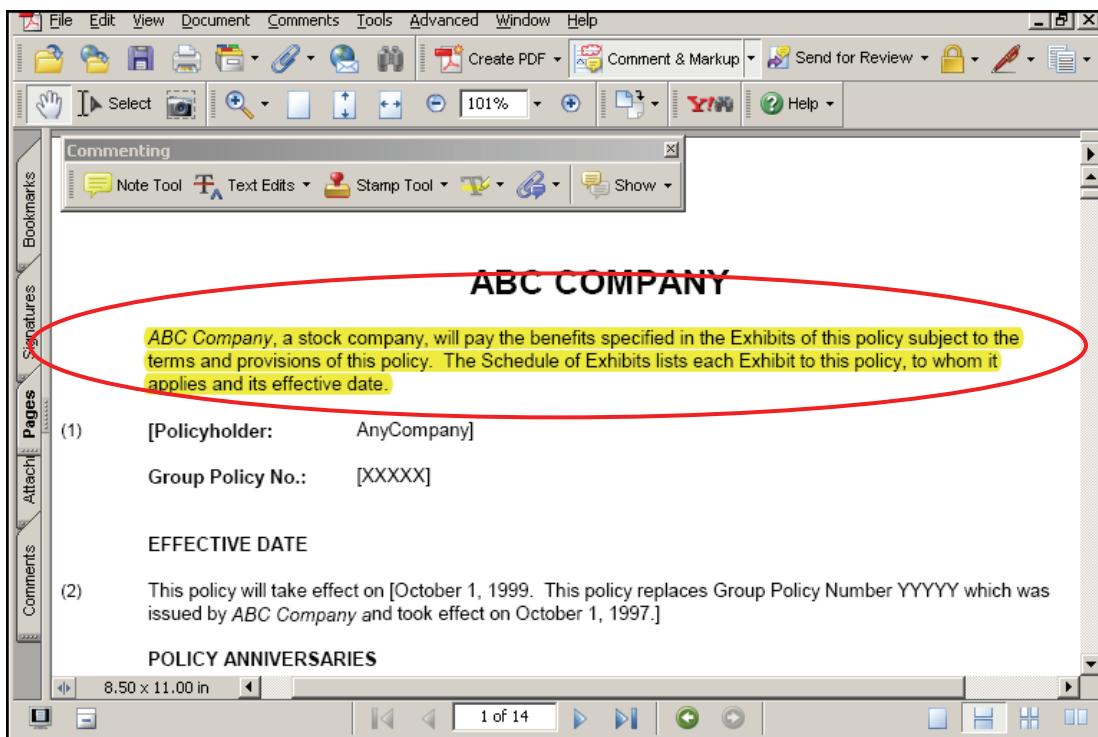
4. Click  in the **Color:** field. The **Color** dialog box appears.
5. Select the color you would like to use as your highlighter. The highlighted text will be highlighted with your new color choice.
6. Select **File, Save** from the main menu or click  to save the changes.

 All highlighted comments and other marked-up comments are easily found by clicking on the comments tab. You can easily find your comments by using the bookmarks automatically created in the comments tab.

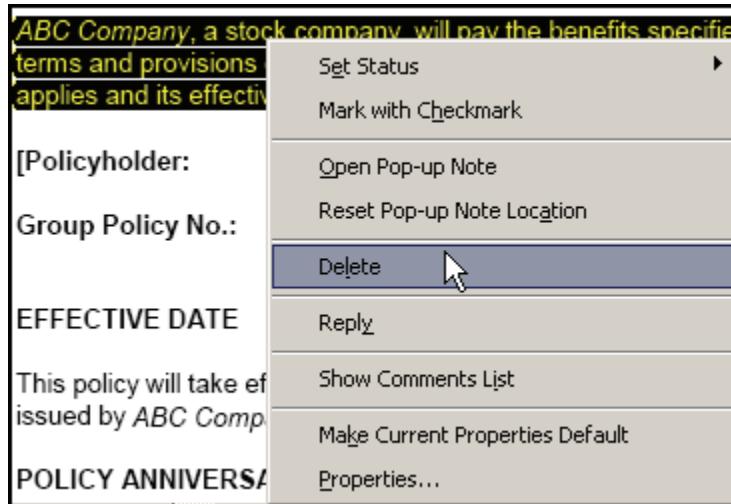
Delete Highlighting in an Acrobat Document

If the text no longer needs to be highlighted, you can delete the highlighting without affecting the text. Use the following steps to delete highlighting in a document:

1. Open the appropriate document in the Adobe Acrobat program window.



2. Right mouse click on the highlighted text. A shortcut menu appears.



3. Select **Delete** from the menu. The highlighting will be removed from this area of the document.
4. Select **File, Save** from the main menu or click  to save the changes.

Advanced Adobe Features

There are some advanced features that can be done in Adobe that allow users to more efficiently use the Acrobat product. Individuals can add links within an Adobe document to other locations in the same document, to other electronic documents or to Web sites.

The second advanced feature that is referenced in this section will save users time when a revised document has been submitted. The comparison feature is ideal for using with documents that are nearly identical. In Adobe Acrobat, you can open an original document and then open a revised copy of that very same document and pinpoint the exact changes that have been made. Within Adobe Acrobat there are two options that allow for comparing PDF documents: page-by-page visual differences, and textual differences including fonts. (It is important to note that you must have the complete version of Adobe Acrobat Professional utilize the comparison options.)

The third advanced feature included in this section is how to create a customized stamp. Most image files can be converted to stamps. This feature would be ideal for individuals that need to insert a seal or special image into a PDF file.

Adding Links to an Acrobat Document

Links can be used to ensure that readers have immediate access to related information. Simple links can be established that connect users to other places within the same document, other documents out on a network or Web sites.

1. Go to the place in the documents where you would like to establish a link.

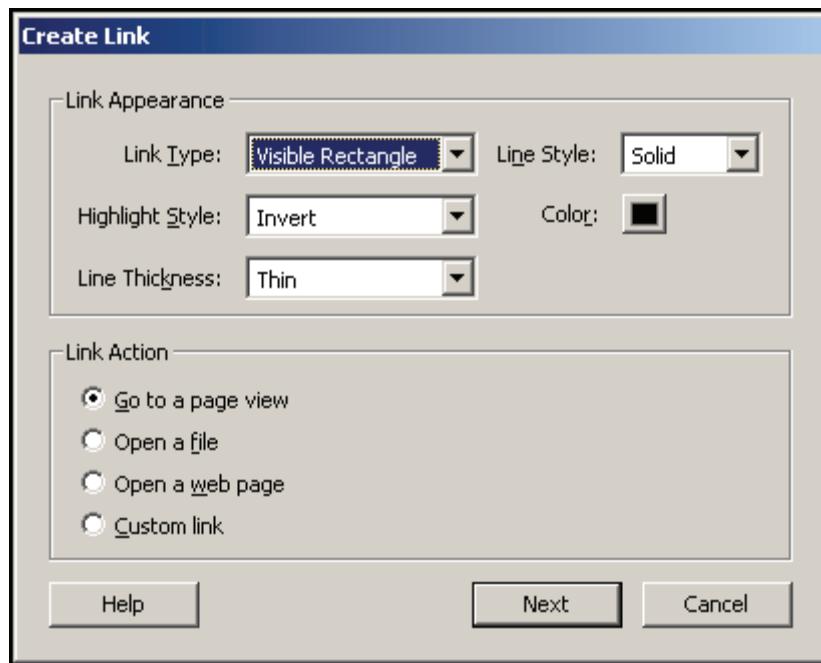
2. Select the **link tool** icon  on the advanced editing toolbar. When this option has been selected, the pointer turns into a crosshair  and existing links within the same document will become visible.

3. Create a box, or rectangle, around the text.

4. Hold down the mouse on the top left corner of the text that will become the link and drag the mouse to the bottom right area of the text to be selected. When the mouse is released a text box should appear around the text.

DEFINITIONS

5. Once the text has been selected the **Create Link** dialog box will display.



6. There are four **Link Action** choices in the create link dialog box.

The Link Action option on the Create Link Window allows users to define what action type the link will perform.

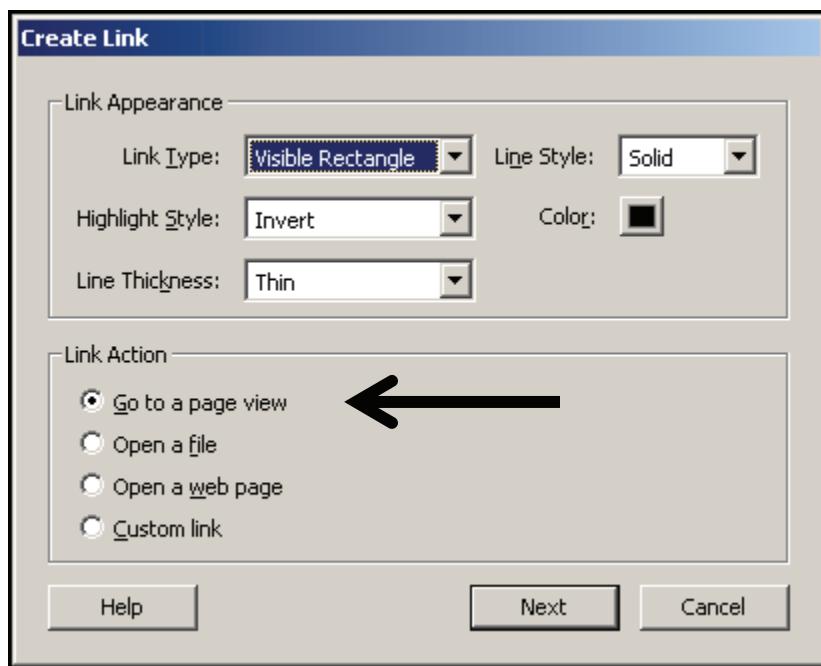
- ◆ Go to a page view – This action type will allow users to link to another place in the existing document.
- ◆ Open File – The Open File action type will allow users to create links to other documents that could PDF files or other file types.
- ◆ Open a web page – Establishing a World Wide Web Link will allow users to connect directly to a Web site by selecting the active link.
- ◆ Custom Link – This action allows you to create a link based off a variety of choices.

Linking within a PDF Document or to Another Document

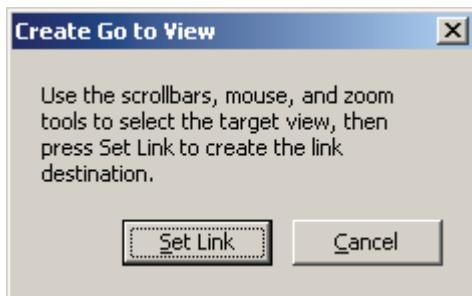
Adobe Acrobat does allow for links to be set that will connect users from a word or text phrase to another place within that PDF file or another document. In addition, links to other PDF files can also be established. It is recommended that the connected file be in a location that all users have access to.

To Establish a Link within the Same Document

1. Complete steps one through five of the Adding Links to Adobe Acrobat Document within this lesson.
2. With the Create Link Window open, under Link Action click on the Go to a Page view radio button.



3. Move to the linked destination.



4. Click the **Set Link** button

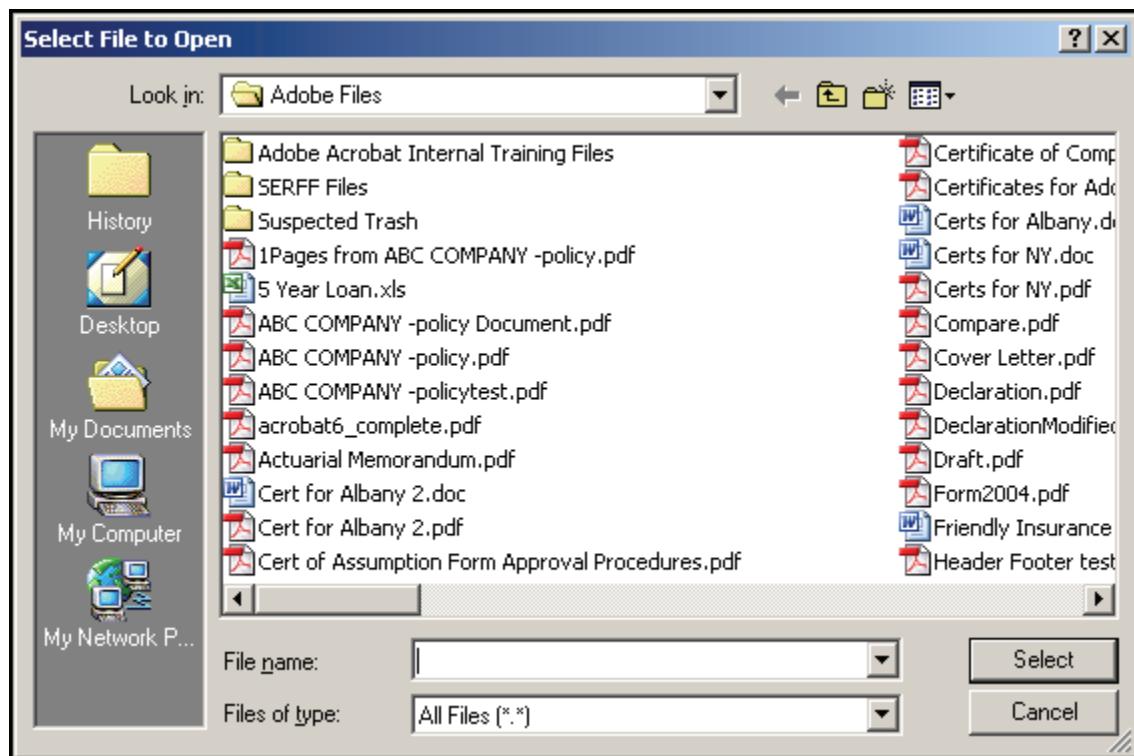
OR

 **To Establish a Link to another Document**

1. Complete steps one through five of the Adding Links to another document within this lesson.
2. With the Create Link Window select open a file.



3. Click on the **Next** button.



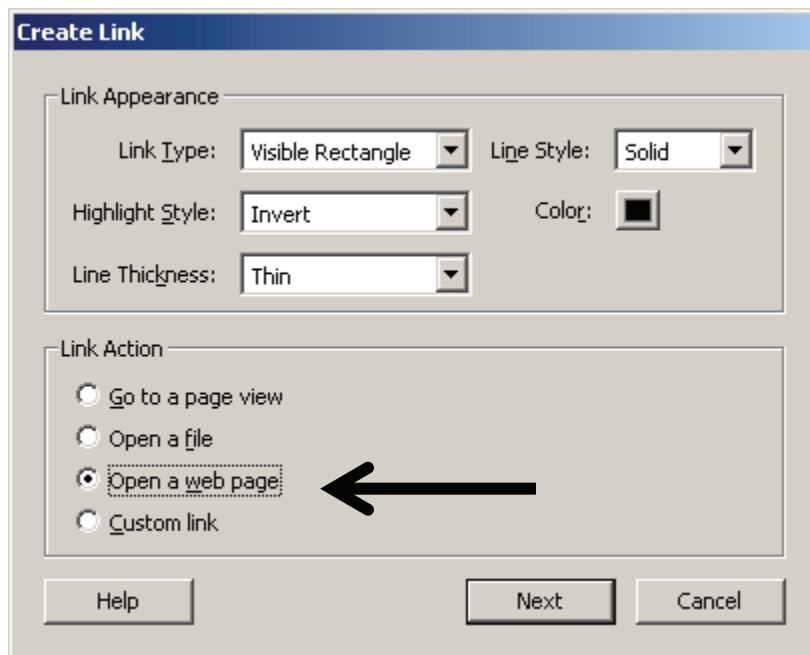
4. Select the file and location and click on **Select** button.

☞ Linking a PDF Document to a World Wide Web Page

This option does require that the user have connection to the Internet. Internet Web Browser configurations can be altered by reviewing the information available in the Adobe Acrobat Help. It is necessary to include the entire World Wide Web Link name.

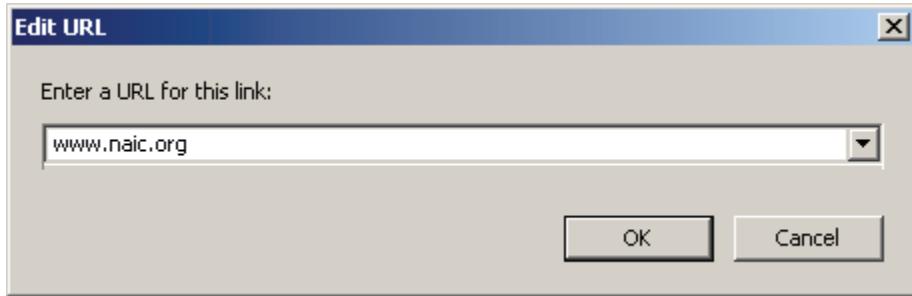
1. Complete steps one through five of the Adding Links to Adobe Acrobat Document within this lesson.

☞ Many Web links utilize the standard appearance of blue underlined text. It is recommended to create the original document with text that is blue and underlined for the location that the link will be inserted prior to converting it into a PDF file format.



2. Complete the Appearance features that apply to the link. If the text of the PDF document is already blue and underlined, you may want to make the **Type Invisible Rectangle** and to select **None** for the Highlight option.
3. With the Create Link Window select open a web page.

4. Click on the  button.

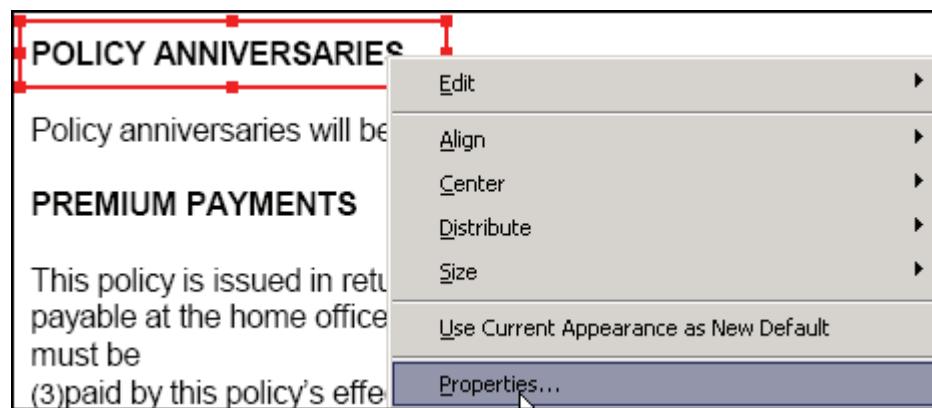


5. Type in the complete Website address. (ex. www.naic.org.)
6. Click the  button.

Editing a link in a PDF Document

You can edit a link at any time. You can change its appearance, associated link action, delete or resize the link rectangle, or change the destination of the link. Changing the properties of an existing link affects only the currently selected link.

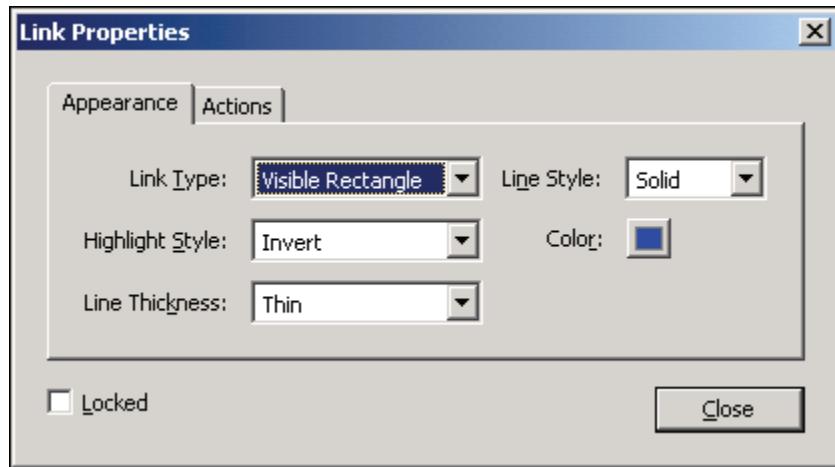
1. **Select the Link tool** or the Select Object tool, and then move the pointer over the link rectangle. The cross hair changes to an arrow when the cursor is over a corner. If the cursor is not directly over a corner of the link rectangle, the cursor is a standard pointer.
2. Do **one** of the following:
 - a. To move the link rectangle, position the arrow anywhere in the rectangle, and drag it to the new location.
 - b. To resize the link rectangle, drag any corner point until the rectangle is the size you want.
 - c. Select the Link tool or the Select Object tool, and double-click inside the link rectangle to open the Link Properties dialog box or right click and choose properties.



Appearance Tab

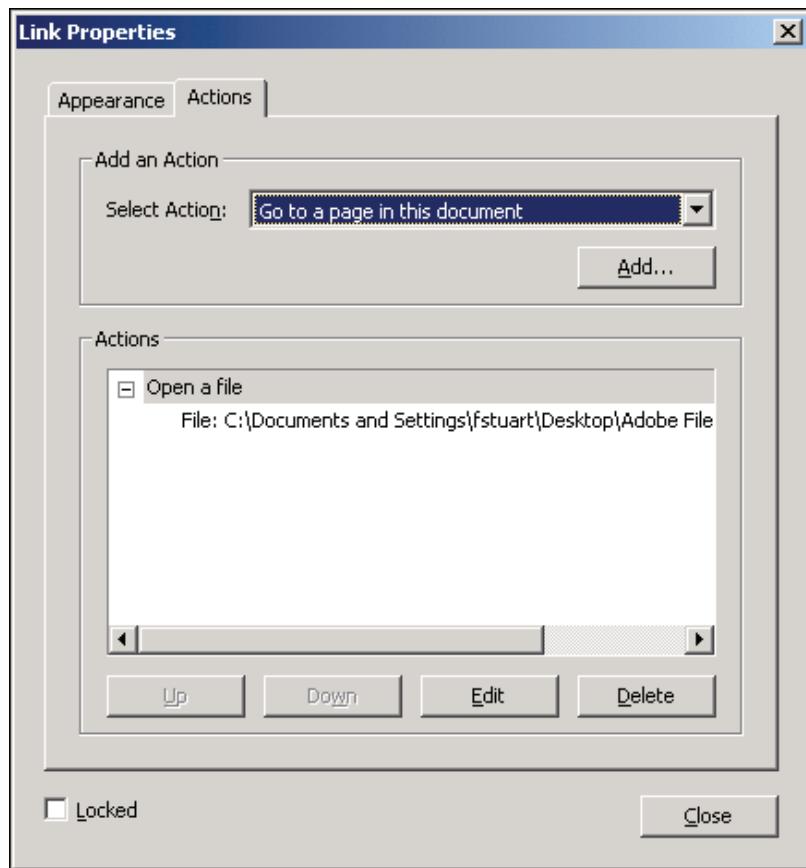
You can define the appearance of a link before you set the link or after you set the link. You define the link appearance in the Properties toolbar or in the Link Properties dialog box. The Link Properties dialog box opens automatically when you create a custom link. For other link types, you must open the dialog box manually.

 To define the visibility of a link, you must use the Properties dialog box. You cannot define the visibility of a link in the Properties toolbar.



Actions Tab

To add an action, you must generally define a trigger that causes the action to occur and then define the action itself. You can add multiple actions to one trigger. Triggers are not available when setting actions for bookmarks and links. These actions are activated only by a mouse click.



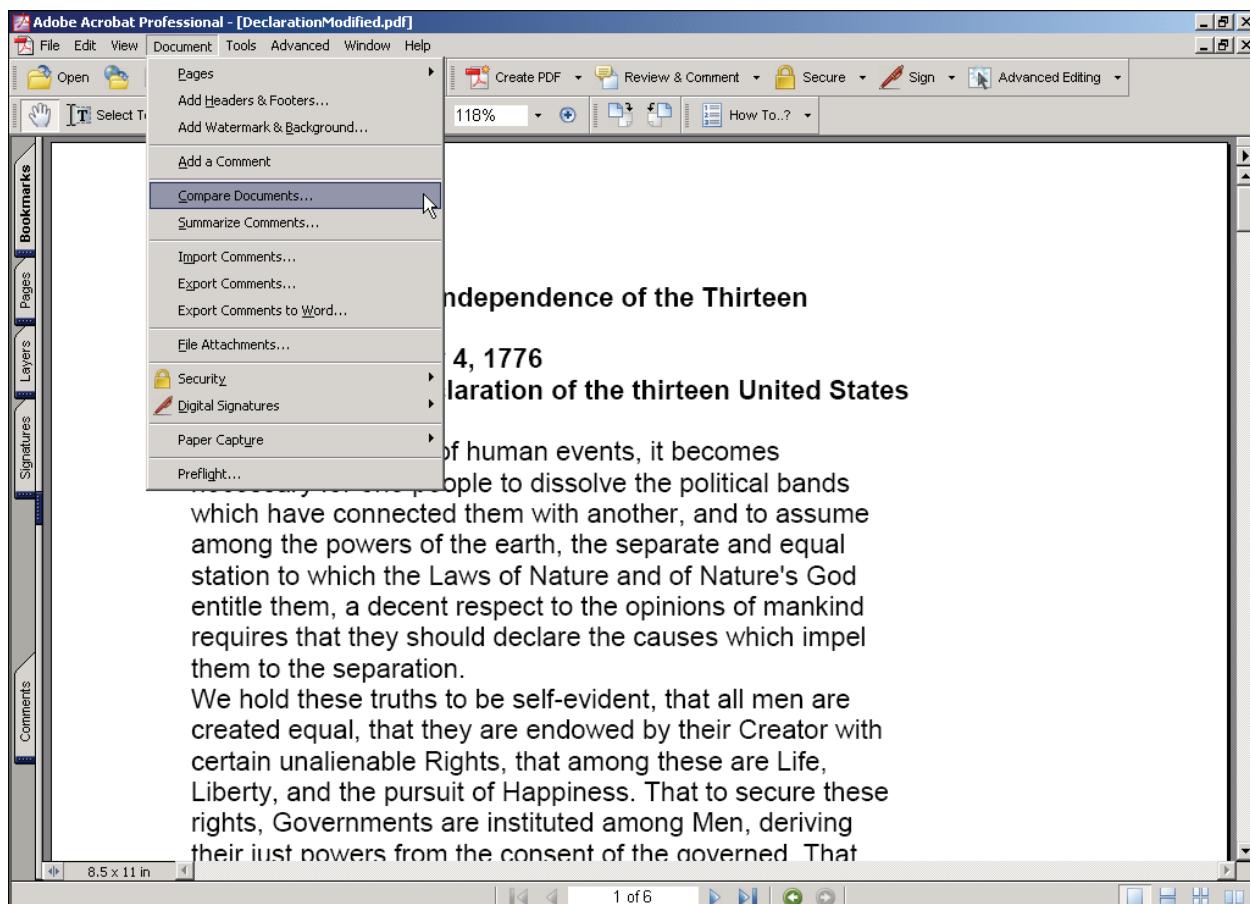
👉 Comparing Two PDF Documents

There are two comparison options available with the Professional version of Acrobat.

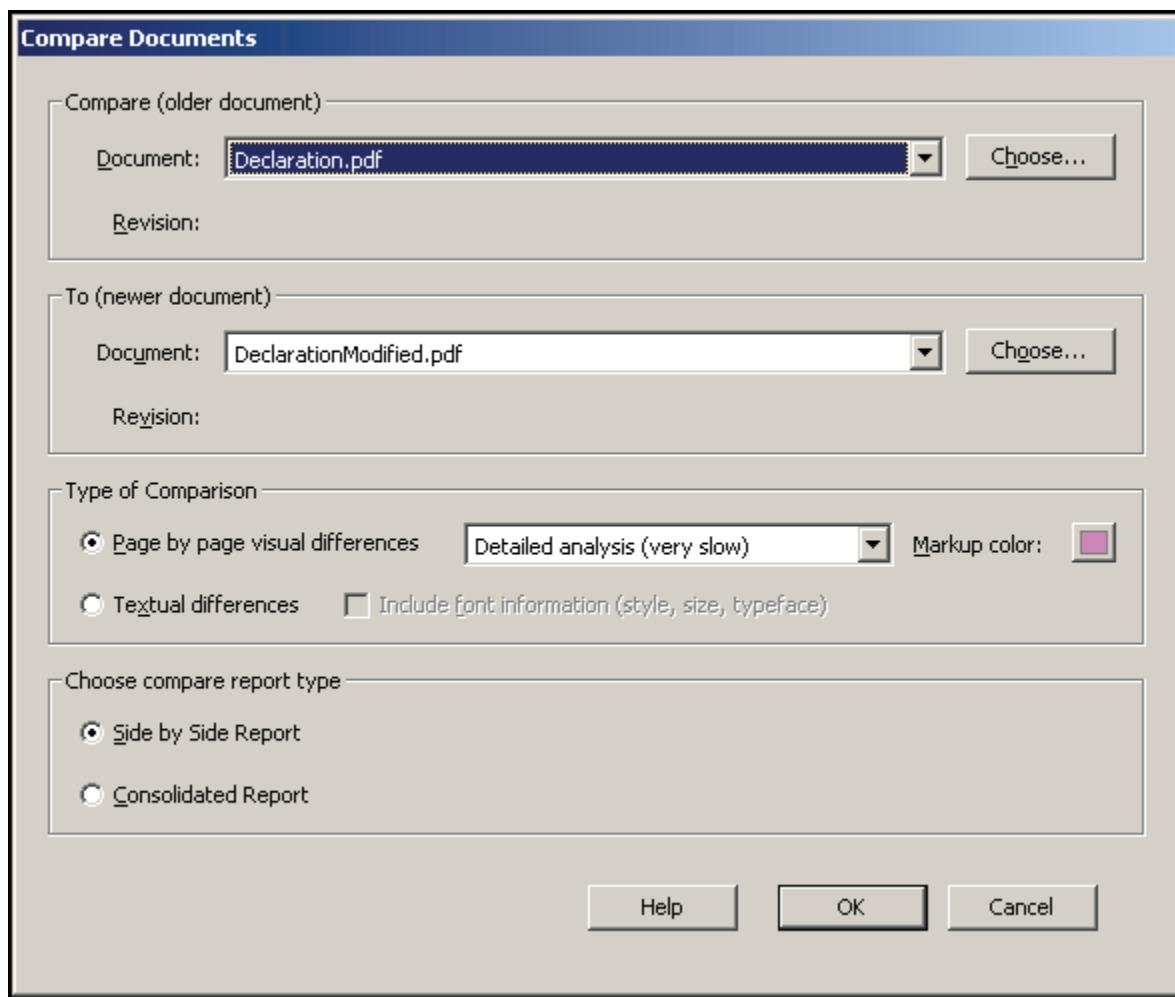
The Acrobat Standard version does not include the compare feature. The two comparisons available are page by page visual differences, textual differences including fonts.

1. Close all open Adobe files.
2. Open the two documents that will be compared.

SERFF End User Training Manual



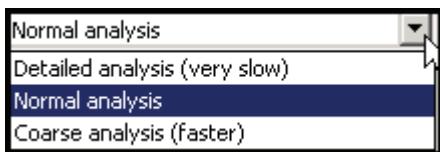
3. From the menu bar select **Document, Compare Documents**.
4. The following window will be displayed:



Type of Comparison

- ◆ **Page by page visual differences** – to find any textual or graphic differences between the documents. (Note: If many changes have been made to the revised document, it may denote changes to every page. This feature is best used for comparing changes to document with minor revisions, such as the addition of a signature file.)

Types of Analysis:



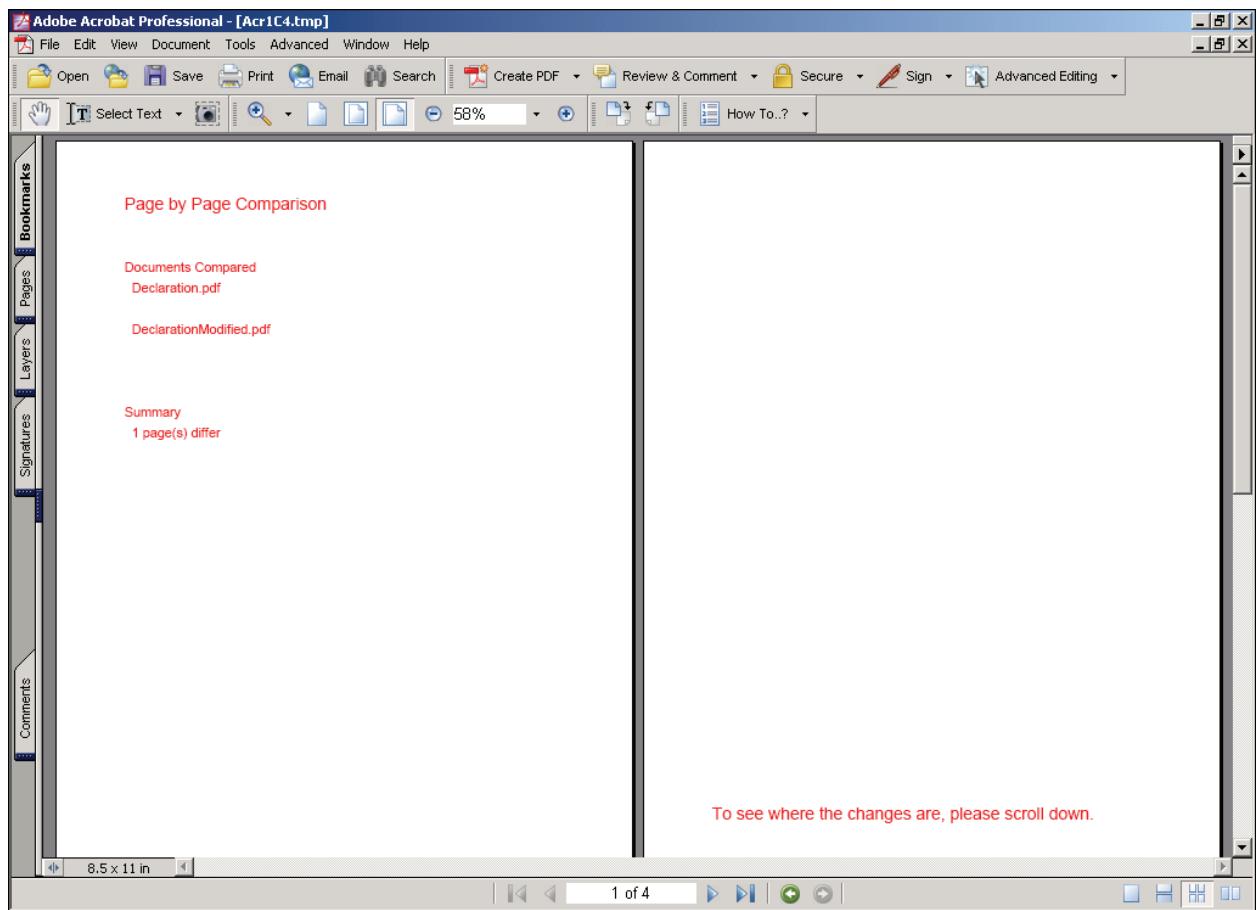
Markup color - To change the result color

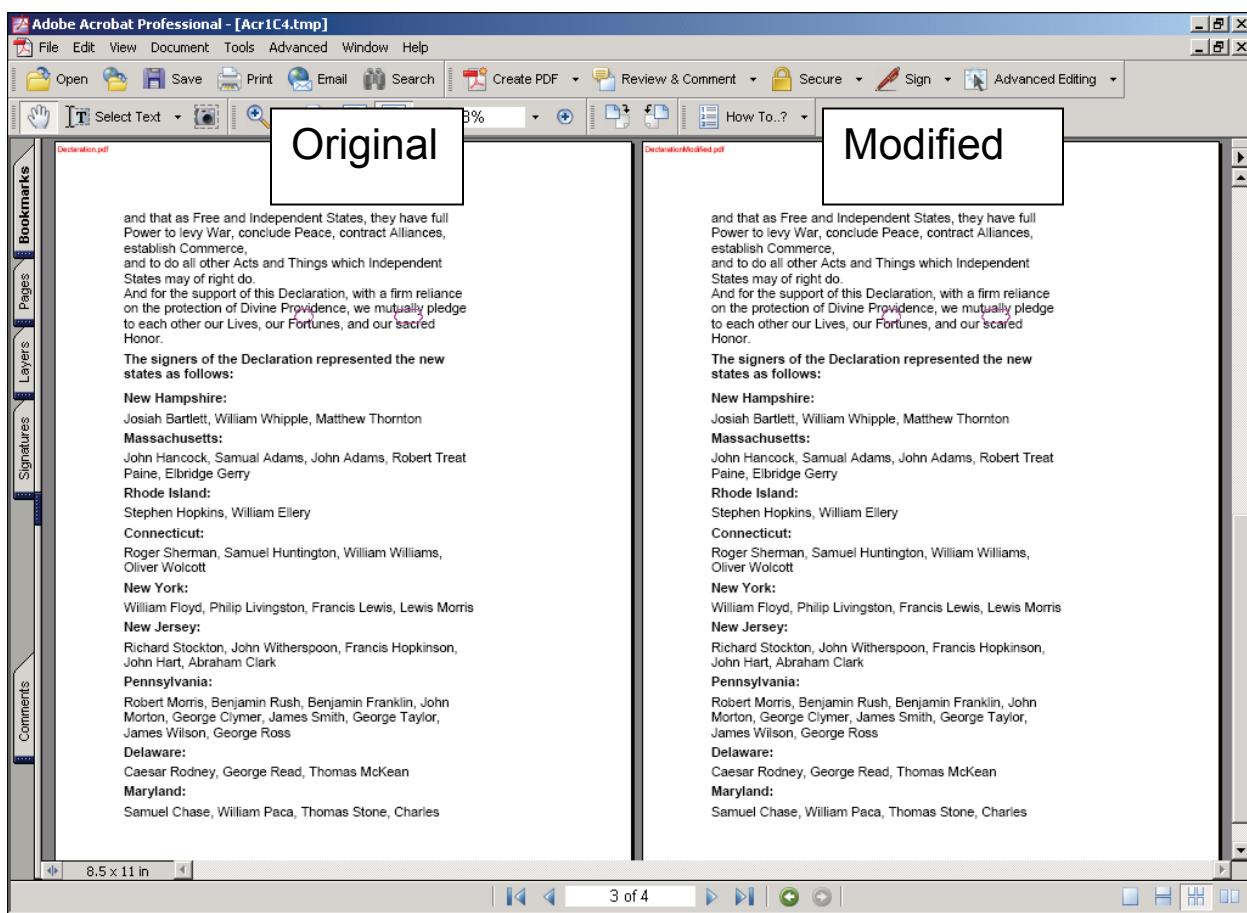
- ◆ **Textual differences** – to show which text has been inserted, deleted, or moved. Select ‘Include Font Information’ to compare any formatting differences.

☞ To compare text-based documents, you may want to select Textual Differences to appear in Side-by-Side Report format. For technical drawings, you may want to select Page-by-Page Visual Differences to appear in Consolidated Report format.

Once a compare option has been selected a new compare document is created that has two sections. The initial section displays two pages and the changes between the two documents. The next section displays the differences between the original and revised document.

5. Click  button.



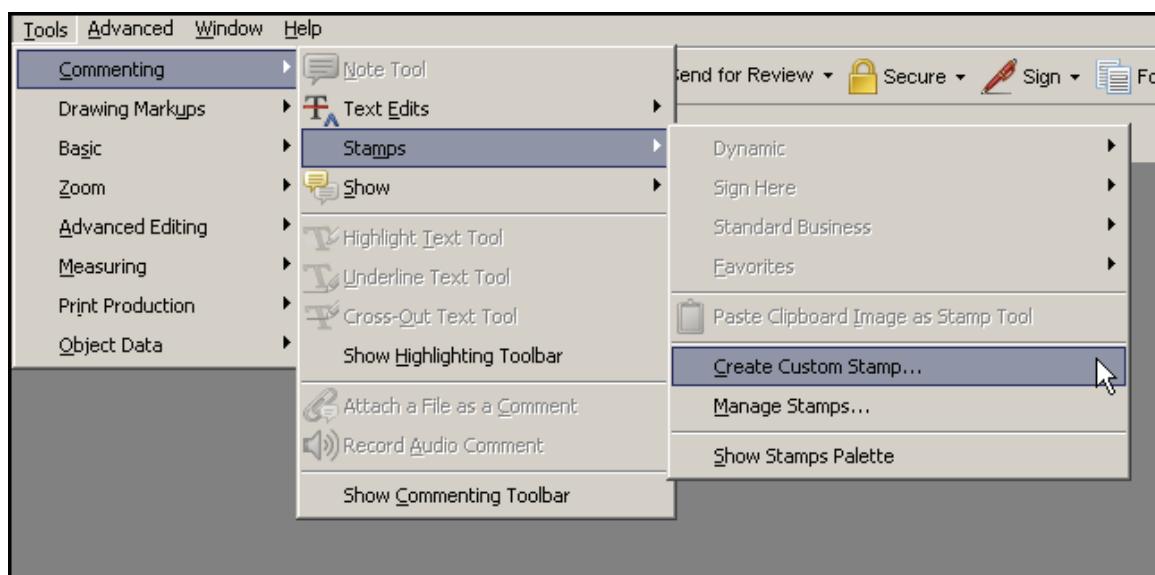


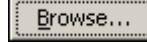
Creating a Stamp from a Converted Image File

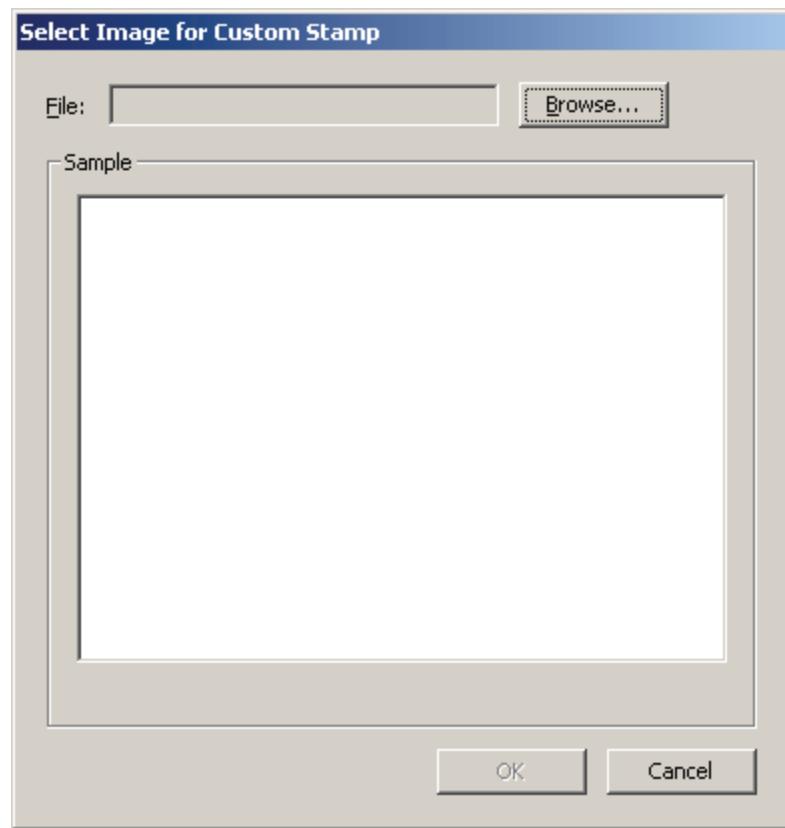
Adobe offers users the ability to add customized stamps to the Adobe stamp library. In order to start this process, it is necessary to have the image file converted into an Adobe file format (PDF). The following exercise will walk you through the process of taking a previously converted image file into a separate category of stamps:

Stamps

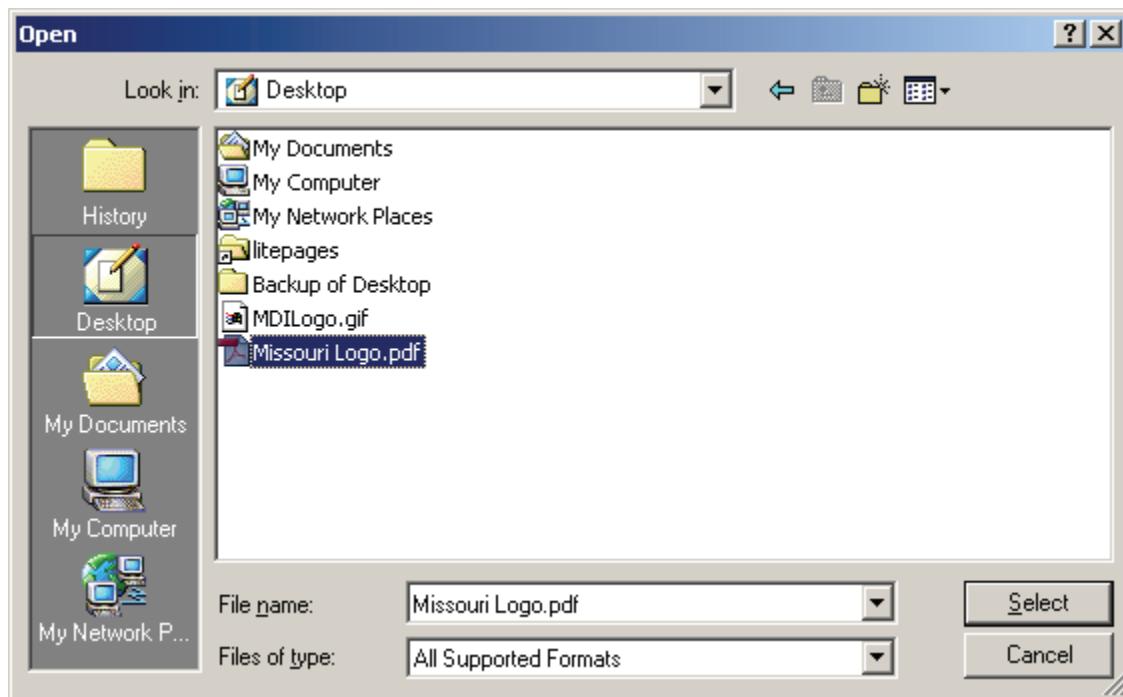
1. Select **Tools**, **Stamp Tool** and the option of **Create Custom Stamp** from the menu bar.



2. Click the  button to navigate to the appropriate PDF file.

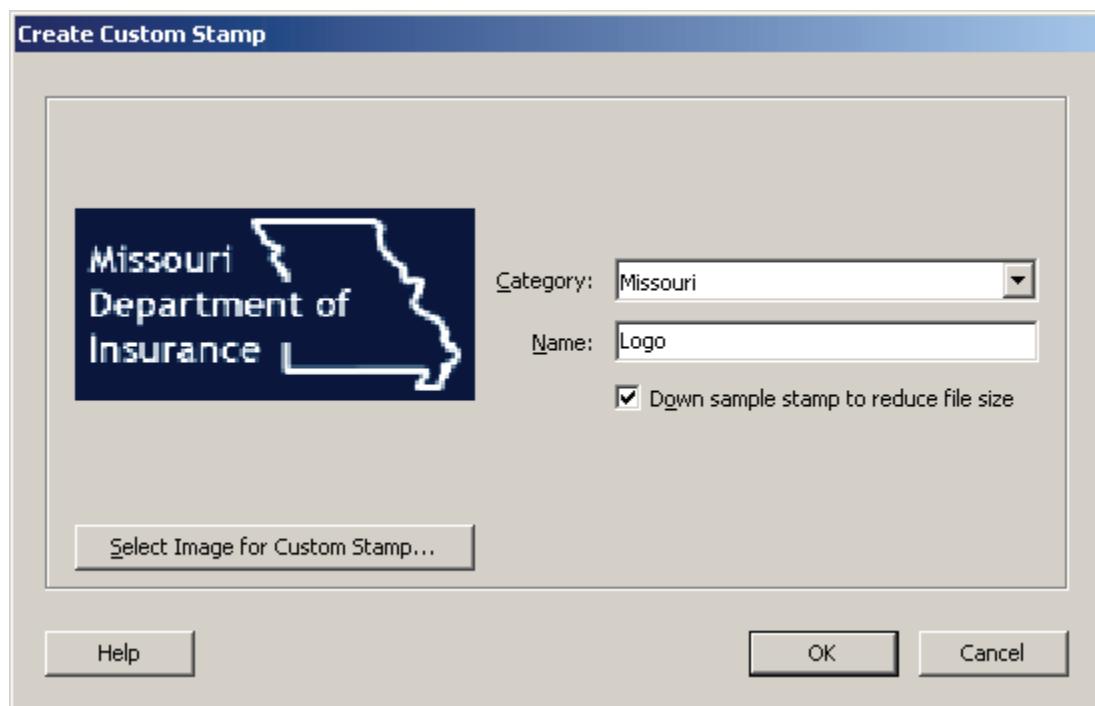


3. Click on the **Select...** button.





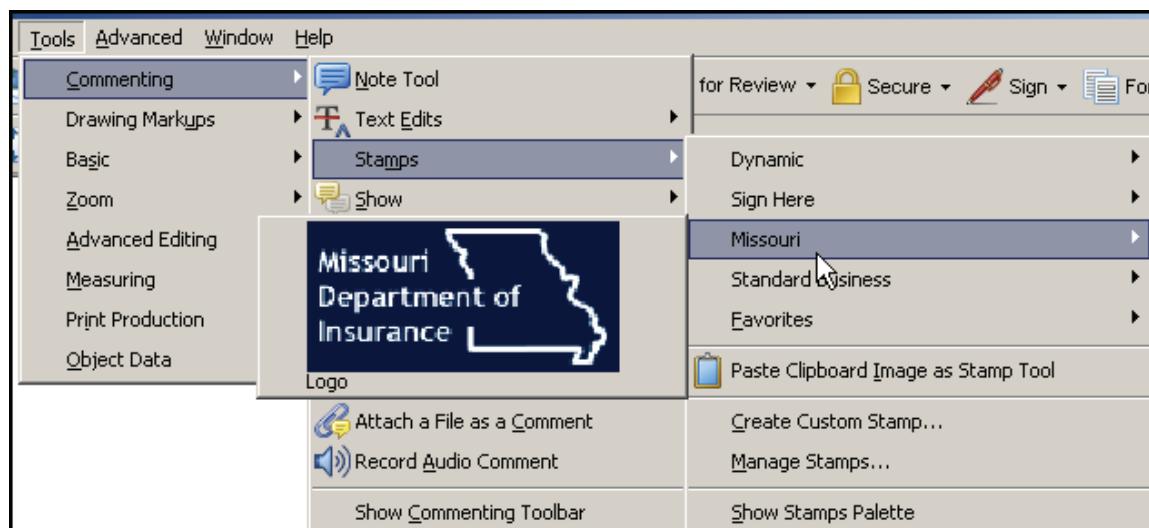
4. Click the  button.



5. Type a Category name and a Name for the image. For this example, we will title this category of Stamps “Missouri” and the name “Logo.”

6. Click on **OK** button.

When you add a stamp annotation to a document, you will now have an option of Missouri. From the new option you will see the image named logo.



Creating Forms

Adobe Acrobat Professional has the tools necessary to transform regular PDF documents into interactive forms. Standardizing forms can be very useful in speeding up the user's completion of the form, and reduce input errors that may delay filing processing. Although it will not be covered in this manual, it is also possible to electronically capture the data from the form to be entered into a database.

Some of the form tools available in Adobe Acrobat include text boxes, buttons, check boxes, combo boxes, list boxes, radio buttons and signature fields. In this chapter you will familiarize yourself with the different form field options and you will be provided with practical exercises for some of the more common ones.

Getting Started

The first step is to import a document into Adobe Acrobat. Here is a portion of a document created in Microsoft Word and distilled into a PDF. We will be using this document as the base to create our form.

Retaliatory Fee Summary Page			
Company Name on Check	Date Check Mailed with this Form Attached		
Check Amount	Type of Filing Life and Health Property and Casualty		
Check Number	Company Filing Number		
Date on Check	Submissions/SERFF Tracking Number		
Retaliatory Filing Fee Calculation			
Companies Filing	State of Domicile	Show Retaliatory Fee Calculation	Fee Total

While it is possible to create a similar layout in Acrobat using the Text, Box, and Line tools, it is more efficient to use your word processing application. Also, form fields created in word processing applications will **not** translate into the PDF document, so don't include them in the document.

Types of Form Fields

A **Form Field** is the portion of the form that is interactive. It is created with the **Form Tool bar** represented by the following:



Button Tool



Check Box Tool



Combo Box Tool



List Box Tool



Radio Button Tool



Text Field Tool

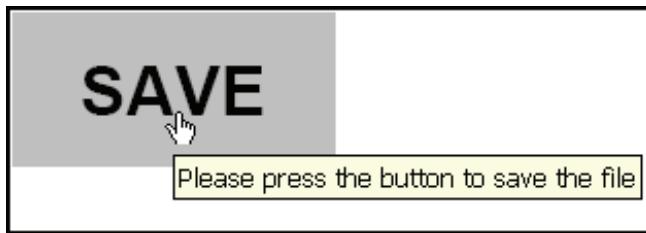


Digital Signature Field Tool

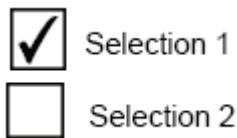
The Form Tool bar can be used to create several different types of interactive fields.

- **Button Tool.** Buttons allow the user to activate commands or actions.

Buttons are most commonly associated with forms, but you can add them to any document. Buttons can open a file, play a sound or movie clip; submit data to a Web server, and much more.



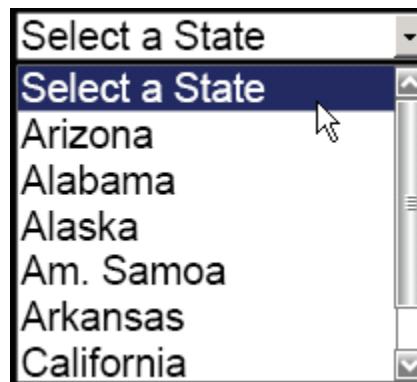
- **Check Box Tool.** Check boxes allow the user to make one or more selections of items on the list.



- ☞ The size of the check inside the check box is determined by the size of the font you specify on the Appearance tab.)

- **Combo Box Tool.** A Combo Box allows the user to view the choices for that item using a drop-down menu.

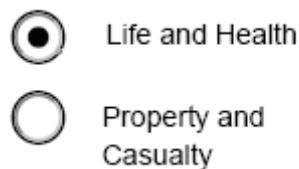
- ☞ The highlighted item in the Item List box appears as the default selected item in the combo box field. To change the default item, highlight another item from the list.)



- **List Box Tool.** List boxes are similar to combo boxes in that they display a list of options from which the user can make a selection. In the list box, though, the user can add items to the drop-down menu.



- **Radio Button Tool.** Radio buttons provide the means to limit the user to one choice (either-or).



- **Text Field Tool.** Text fields can be set up to accept user input, to display text strings, and to allow multiple lines of text. You can also limit the number of characters a user can type into the field, and allow users to add text formatting.

User can type information into this field

 Some property settings are dependent on others. For example, you cannot check the spelling of a password field or a field used for file selection. These options appear unavailable. You must deselect the check spelling option before you can select the password or field used for file selection options.

- **Digital Signature.** A digital signature box allows the user to “sign” the documents with an electronic signature and then inserts a graphic

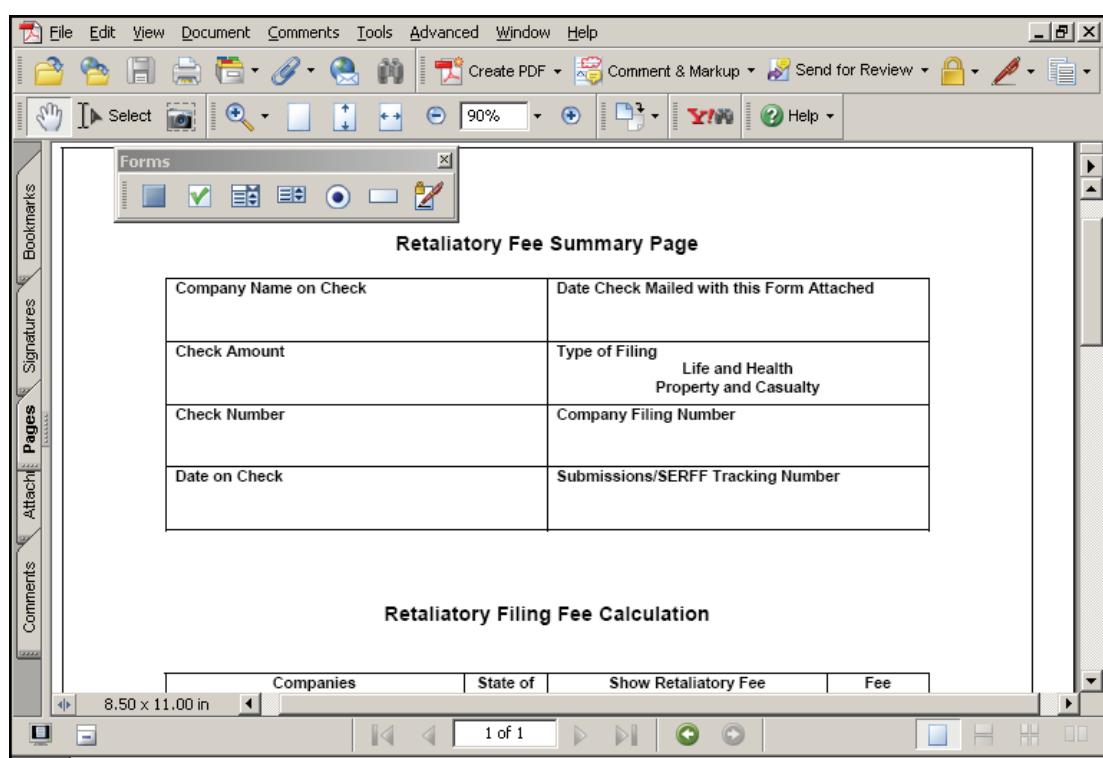
representation of that signature. A digital ID contains your signature information. Digital IDs are also referred to as credentials or profiles.



Creating Text Form Fields

The **Text Box** is the most commonly used field. The initial procedure for creating any of the above options is exactly the same. Ensure that the document you intend to make into a form is open and displayed in Adobe Acrobat.

1. Click on the text field tool  button.

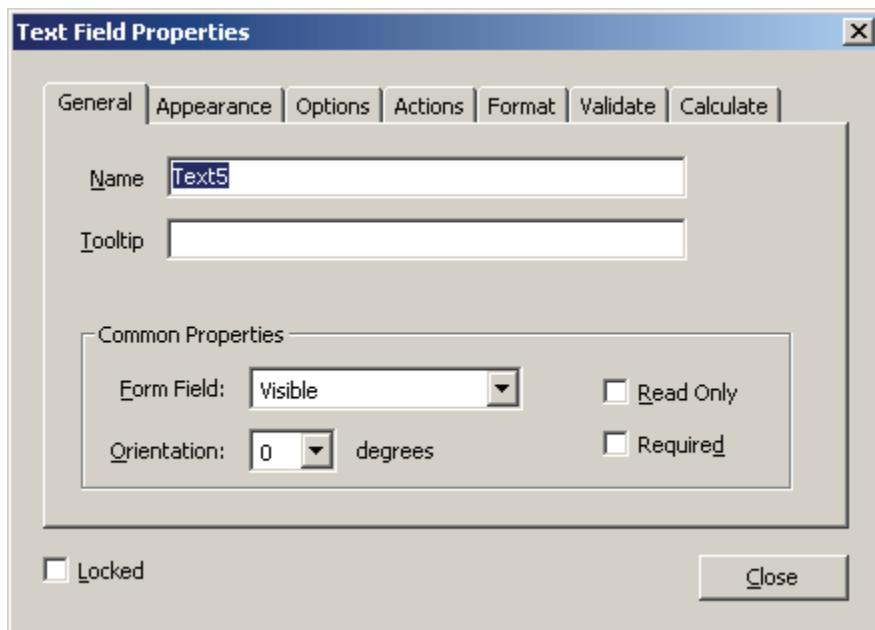


2. After you click the Text Field Tool Button, Acrobat's cursor will turn into crosshairs (). Position the crosshairs at the point where you want the form field to begin then click and hold the left mouse button and drag to create a box.

Retaliatory Fee Summary Page

Company Name on Check	Date Check Mailed with this Form Attached
Check Amount	Type of Filing Life and Health Property and Casualty
Check Number	Company Filing Number
Date on Check	Submissions/SERFF Tracking Number

3. When you release the mouse button the form field will be automatically inserted and the **Field Properties** text box will appear.



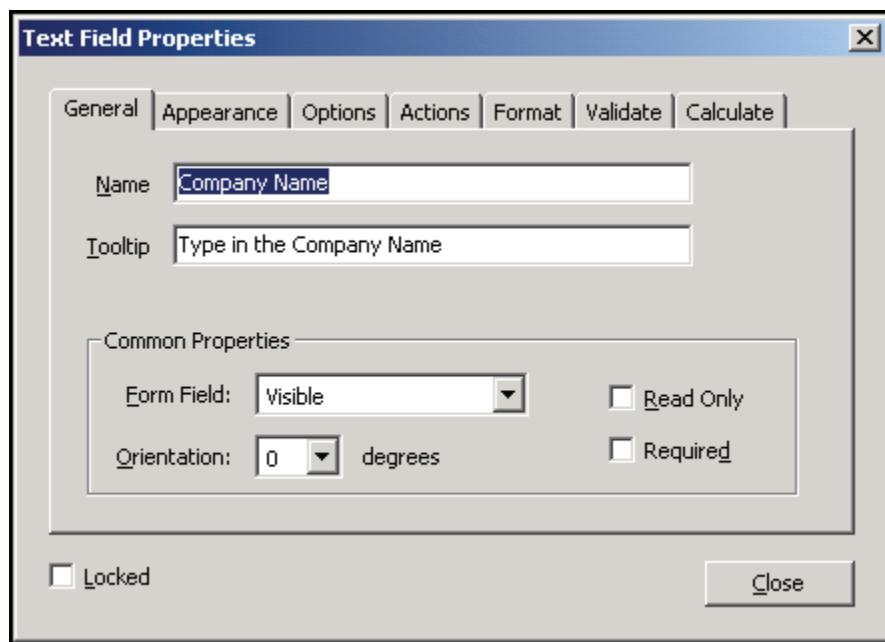
4. In the text field properties there are 7 tabs to choose to format a text field.

- General** – Enter a name, tooltip text, and other general properties. Select the Read Only option to prevent the field from being modified by the user.
- Appearance** – The appearance properties determine how the form field looks on the page. Remember, if you select a background color, you won't be able to see through to any graphics behind the form field.

- c) **Options** – In the Text Field Properties dialog box, click the Options tab, and then do any of the following:
 - 1) Select the text field alignment from the Alignment menu. This sets the alignment of text within the text box; it does not align the text box itself.
 - 2) Type the default value text for the text field. You can leave the text box empty.
 - 3) Select Multi-line to allow for more than a single-line entry in the text field.
 - 4) Select Scroll Long Text to compensate for text that extends beyond the boundaries of the text field.
 - 5) Select Allow Rich Text Formatting to allow users to apply styling information to the text, such as bold, italic, etc. This might be useful in certain text fields where such styling information is important to the meaning of the text, such as an essay.
 - 6) Select Limit of Characters to set a limit to the number of characters that can be entered in the field.
 - 7) Check spelling.
- d) **Actions** – The Actions tab, and specify any actions that you want to associate with the form field, such as jumping to a specific page or playing a media clip.
- e) **Format** – You can choose the format of data entered in text and combo box form from the Select Format Category menu, such as numbers, percentages, dates, and times.
- f) **Validate** – Use validation properties to restrict entries to specified ranges, values, or characters. This ensures that users enter the appropriate data for a specified form field.

g) **Calculate** – The calculation options let you perform mathematical operations on existing form field entries and display the result. You can use the common operations predefined in the Calculate Properties dialog box.

5. The **Name:** field is mandatory and it is recommended that you select a name that is descriptive and **unique** to each field. In our example we named the field **“Company Name.”** The **Short Description** field is optional. Text entered into this box will appear as a tool-tip like pop-up when the user’s mouse passes over it. This makes it extremely useful for displaying short instructions.



Company Name on Check	
<input type="text"/>	
C	Type in the Company Name
Check Number	
Date on Check	

6. Next, click the **Appearance** tab.



From this window you can change the appearance of the text box and text by changing the respective options. If you want a visible border around your text box or a color background, simply check the boxes next to the option and select the style and colors.

7. Click the **Close** button to close the Field Properties box and return to the form.

Company Name on Check
<input type="text" value="Company Name"/>
Check Amount
<input type="text" value="Check Amount"/>
Check Number
<input type="text" value="Check Number"/>

☞ While still in the Form Tool view, the text boxes will be displayed with the name of the field inside the box (the box and field name will not be visible while the form is being used). Note that we've created fields for the other form items, using the same methods described above.

The Field Properties box can be redisplayed by double clicking on the name of the text box you want to view.

8. The size of the form field can be changed to increase, or decrease, the field area. Single clicking on the field will cause the field box to turn red and squares, called "handles" will appear in the corners of the box. Place the cursor over one of the boxes and note what you see.



☞ Notice the double-headed arrow that has appeared, indicating that you can change the box. With the arrow showing, left mouse click and drag the box to the desired size and shape, then release.

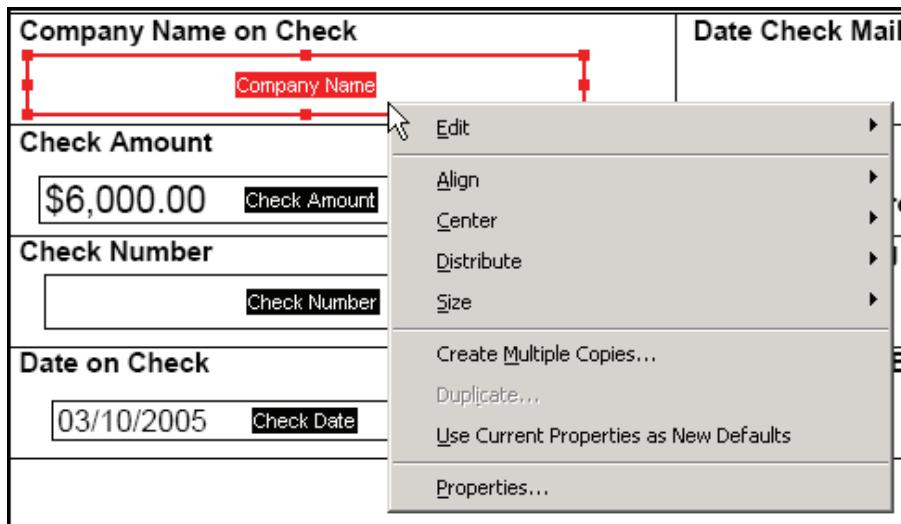
9. Once the form field is created, you can test it by clicking the **Hand Tool**  button. This will activate the form and allow you to enter information just as the user would.

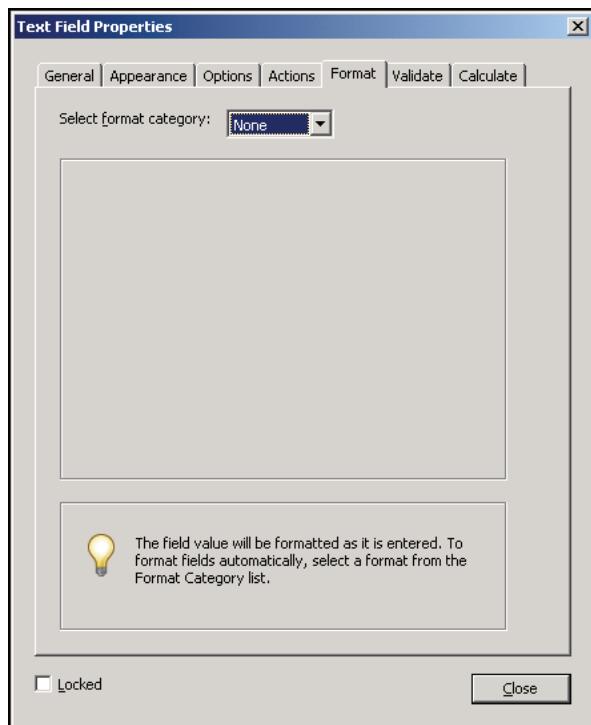
 **Formatting Text Form Fields**

To ensure the information being entered by the users is consistent, the text fields can be formatted. Some of the formatting options that are available are date and time, number and currency, zip code, telephone numbers, and social security numbers. You can also create custom formats to use with organizationally specific entries (such as the SERFF Tracking Number).

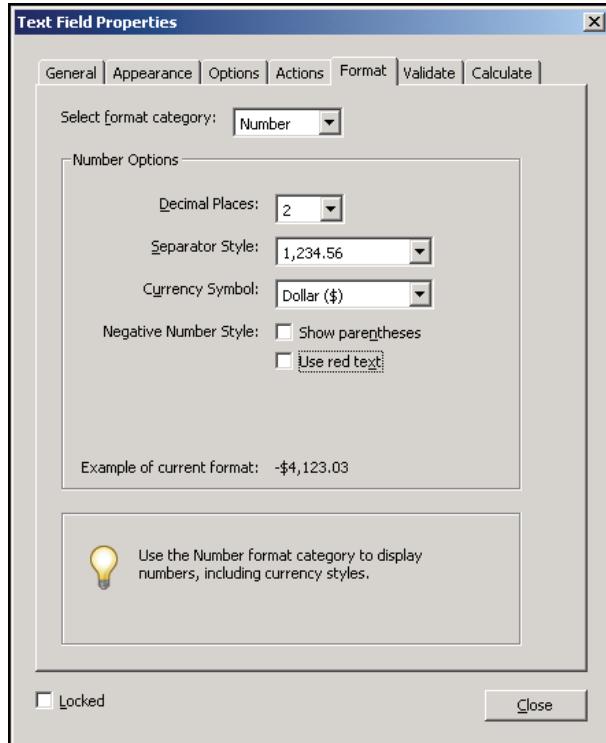
1. Open the Field Properties box by clicking on the text field tool and then double clicking the form field, "CheckAmt" then select the **Format** tab. Numbers entered in the "Check Amount" field will represent United States currency. We will change the formatting to always display the numbers as currency.

 (Field Properties: Right click on the field and choose properties after clicking on the text field tool.)





2. Since the default format is “None,” click the “Number” choice in the **Category** window.



Making selections from the drop-down menus will make changes to the format. Select “Dollar” from the **Currency Symbol**: drop down list and leave the other defaults unchanged.

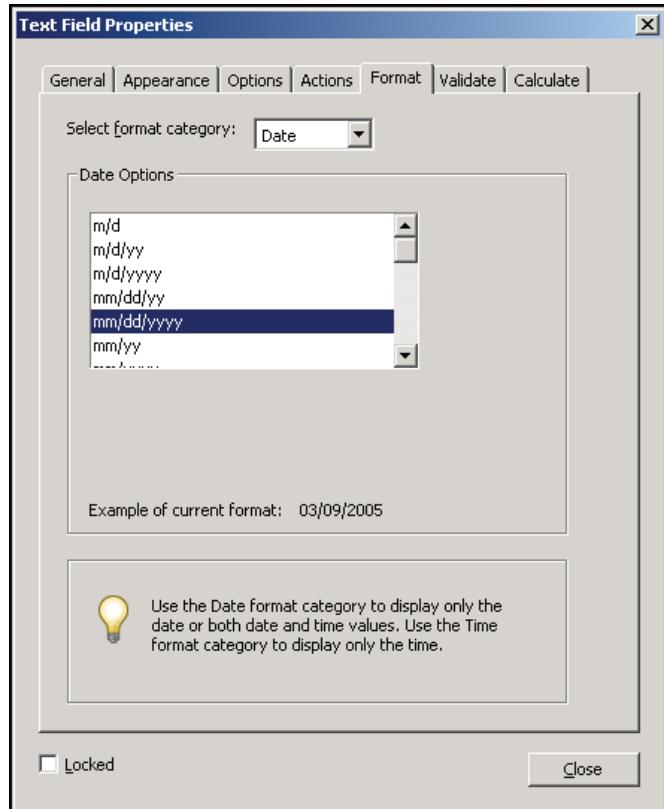
3. Clicking the **Close** button will save the format and close the box. Click the **Hand Tool** and test the formatting by entering a number into the field. After clicking off of the field the number should be formatted like this:

Check Amount

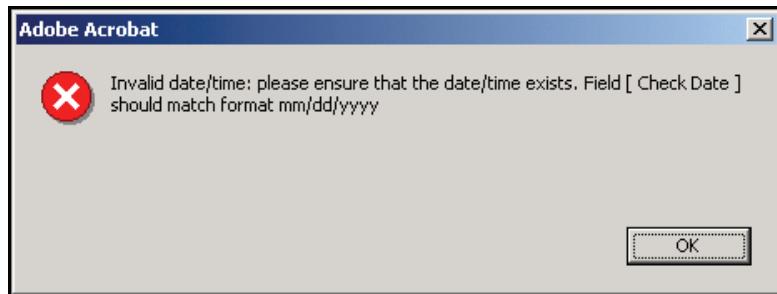
\$6,000.00

Formatting the date would also be a fairly common requirement. If the data in the form were being captured to export to a database, making sure the date was in the required format would be vital since there are numerous ways of writing a date.

4. To format the **date field**, open the Field Properties box and select the **Format** tab.



We have chosen the format that separates the date by slashes and will require the user to type the four-digit year. If the user does not include the four-digit year, a warning message will appear.



5. Click **Close** to exit the **Field Properties** box.

Now, regardless of how the user enters the date, it will always display the way you choose. After activating your form, type in:

Date on Check

March 10, 2005|

Click off of the field (or press the **Enter** key) and you will see that the date has been changed to meet our criteria.

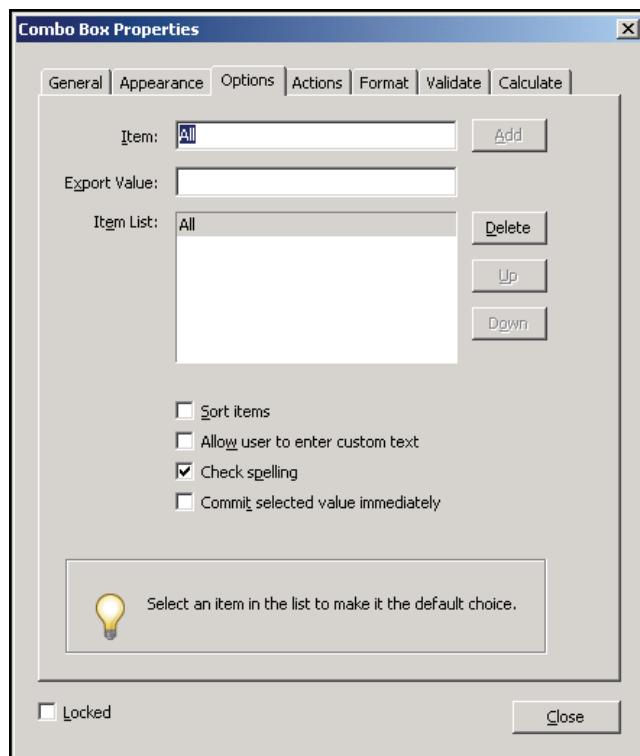
Date on Check

03/10/2005

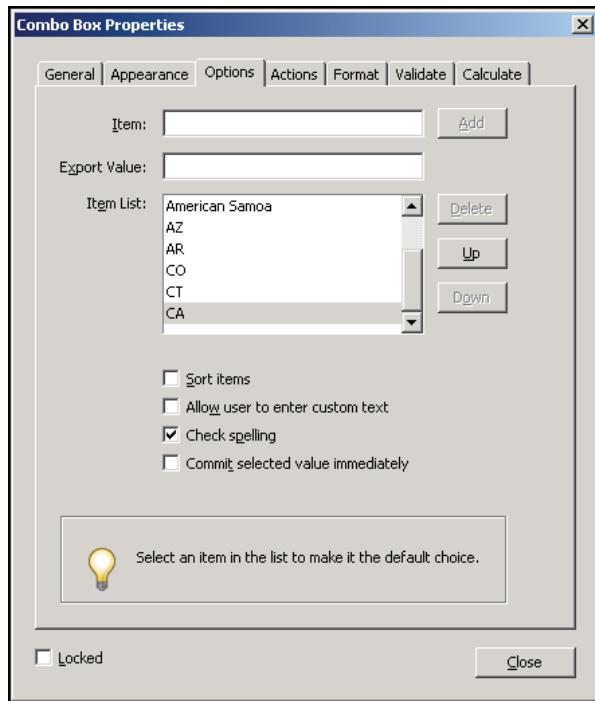
Creating and Editing Combo and List Boxes

Combo boxes, or drop-down menus, are very useful when the user must be given several choices to select from, but form space must be conserved. In this example, we will create a list of states the user can choose from. **List boxes** are created in the same manner as combo boxes.

1. Select the combo box Tool  button from the Forms tool bar
2. Open the Field Properties and Choose the **Options Tab**. The Options Tab allows you to create the list of choices from which the user can make their selection.
3. Type the first item you want displayed into the **Item:** box. Only one item can be entered at a time. When text is entered into the **Item:** box, the **Add** button will become active. Clicking the **Add** button will add the item to the box in the center of the window.



4. Repeat the process for all of the choices you want displayed.

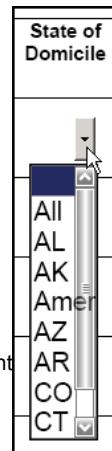


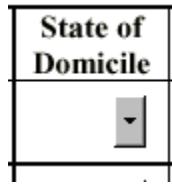
☞ Notice from the preceding diagram that California (CA) was entered out of order. There is no need to retype the list. Use the **Up** and **Down** buttons to move the selection to different positions in the list. You could also check the **Sort Items** check box to automatically sort the items as you enter them into the list.

5. Before exiting the form, create a blank item to be used as the default selection. This will prevent the field from being automatically populated and will make it more noticeable if it is not filled out. It will also reduce unnecessary clutter on the page.

Place the cursor into the **Item:** box and press the **Space Bar** then click **Add**. Make sure the blank line is selected to make it the default and click **OK**.

6. When you activate the form, the combo box will look like this:



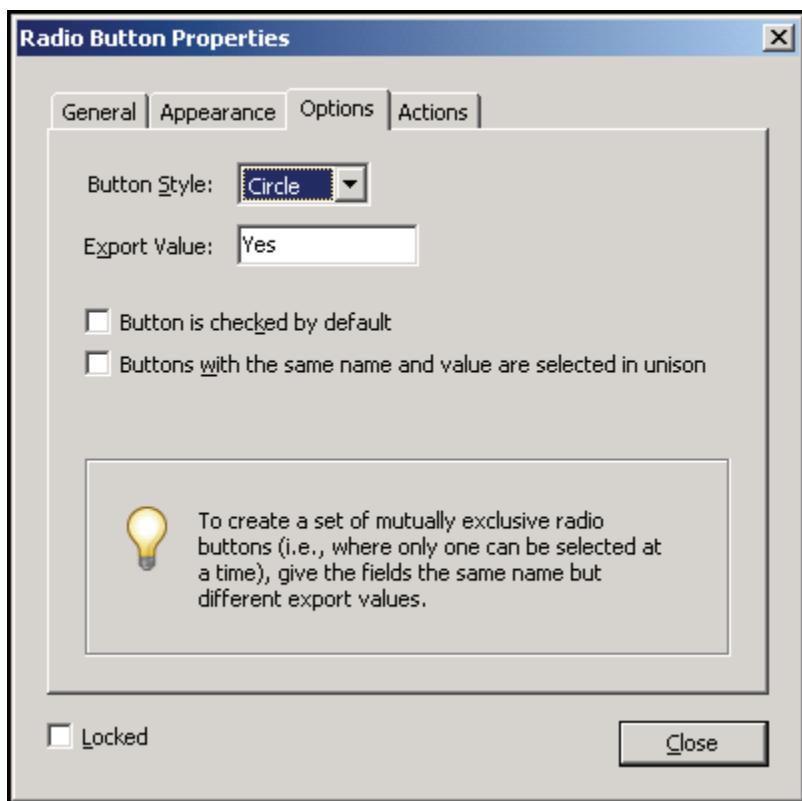


Click the arrow button to reveal the list and make the selection.

Creating Radio Buttons and Check Boxes

Radio buttons and **Check boxes** are tools that allow the user to make selections from a list of items. If you want to restrict the user to making one choice, a radio button would be your best choice. Though if you want to give the user the option of making more than one choice, use check boxes. The procedures for setting up radio buttons and check boxes are exactly the same. For our example, use radio buttons in the “**Type of Filing**” section on the Retaliatory Fee Form. The user will be given the choice of either Life and Health or Property and Casualty.

1. Select the radio button from the Forms tool bar. Filing Type has been entered into the “**Name:**” box under the general tab. Open the Field Properties box and select “**Options Tab.**”

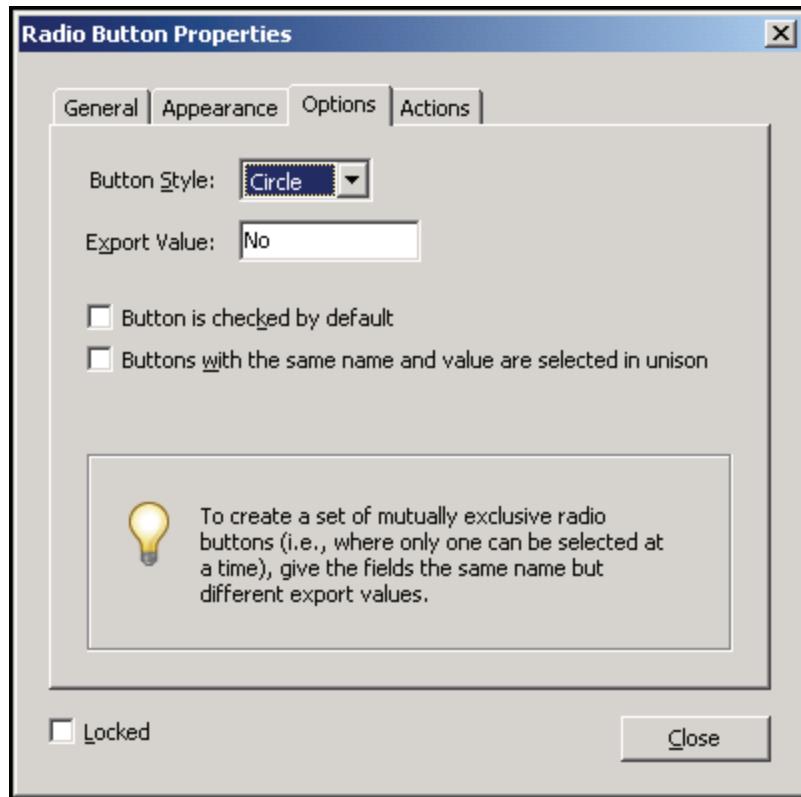


2. From the **Radio Style** drop-down, you have the choice of several different styles of radio buttons: Circle, Check, Cross, Diamond, and Star. For this example, use the “**Circle**” style, since it is the most common.
3. In the **Export Value** box, the default entry is “**Yes**” and will remain that way for this Field Property. Click the **Close** button.
4. With the Filing Type form field still highlighted, copy and paste the field using the Edit menu, keyboard shortcuts (Ctrl+C and Ctrl+V), or right mouse-click the field and use the Edit menu in the pop-up box.

When you **Paste**, the new field will appear somewhere in the middle of the form. Move the duplicated field under the first.

Type of Filing	
Life and Health	<input type="checkbox"/>
Property and Casualty	<input type="checkbox"/>

5. Double click the **second** Filing Type form field to open it.



6. Change the Export value in this field to “**No**.”

 **IMPORTANT:** In order to make the FilingType radio buttons mutually exclusive, the **Export Values** must be different but the form fields must have the **same name**.

7. Activate the form using the hand tool to view the “**Type of Filing**” radio buttons.

Type of Filing	
Life and Health	<input checked="" type="radio"/>
Property and Casualty	<input type="radio"/>
Company Filing Number	
Select one of the filing types	

 You will only be able to select one of the buttons at a time.

Creating Calculated Fields

In our example, there are additional rows to add subsidiary companies to the form.

Retaliatory Filing Fee Calculation

Companies Filing	State of Domicile	Show Retaliatory Fee Calculation	Fee Total
	<input type="button" value="▼"/>		
	<input type="button" value="▼"/>		

For each row there is a calculation that results in a value that is placed in the “Fee Total” column. Adobe Acrobat has the ability to calculate the sum of the values in the “Fee Total” column for the user.

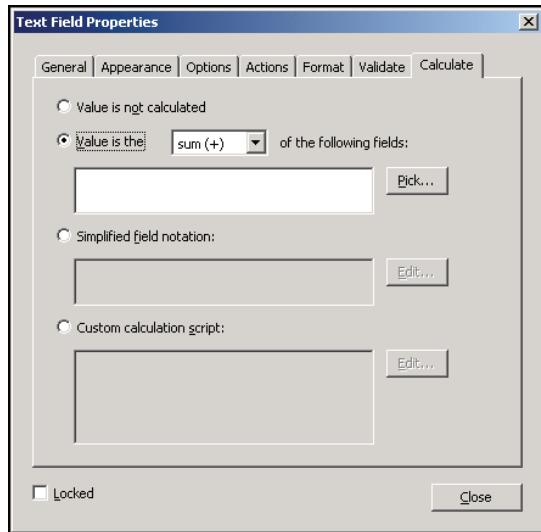
1. First, set up a **Text Form Field** in each of the cells in the “Fee Totals” column using the techniques used earlier in the chapter. Give each of the cells a different name to make them unique.

Companies Filing	State of Domicile	Show Retaliatory Fee Calculation	Fee Total
<input type="text" value="Filing Co 1"/>	<input type="button" value="▼"/>	<input type="text" value="Fee Cal 1"/>	<input type="text" value="Fee Total 1"/>
<input type="text" value="Filing Co 2"/>	<input type="button" value="▼"/>	<input type="text" value="Fee Cal 2"/>	<input type="text" value="Fee Total 2"/>
<input type="text" value="Filing Co 3"/>	<input type="button" value="▼"/>	<input type="text" value="Fee Cal 3"/>	<input type="text" value="Fee Total 3"/>
<input type="text" value="Filing Co 4"/>	<input type="button" value="▼"/>	<input type="text" value="Fee Cal 4"/>	<input type="text" value="Fee Total 4"/>
		Total of Retaliatory Fees for this Filing Submission	

2. Copy and paste one of the “FeeTotal” fields and place it into the cell beneath “FeeTotal 4.” Open the Field Properties box by double clicking the new field and change the **Name:** to an appropriate title.
3. Make sure the field is formatted for **Numbers** and **Currency**. If it’s not, the **Calculate** tab will not allow access to the calculating functions.

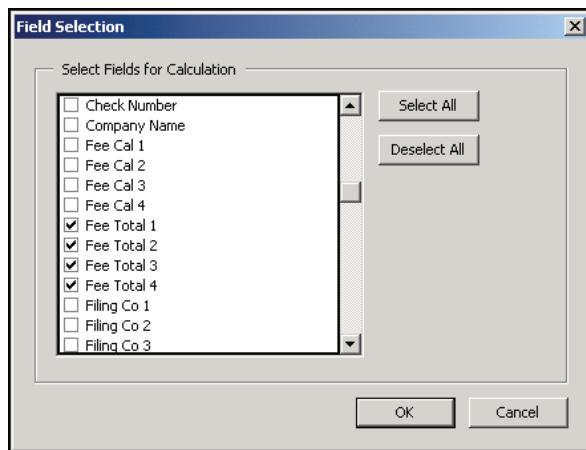
4. Next, select the **Calculate** tab. The default selection is “**Value is not calculated**” so select the “**Value is the [calculation] of the following fields:**” button. Once that button is selected you will have access to the calculation options.

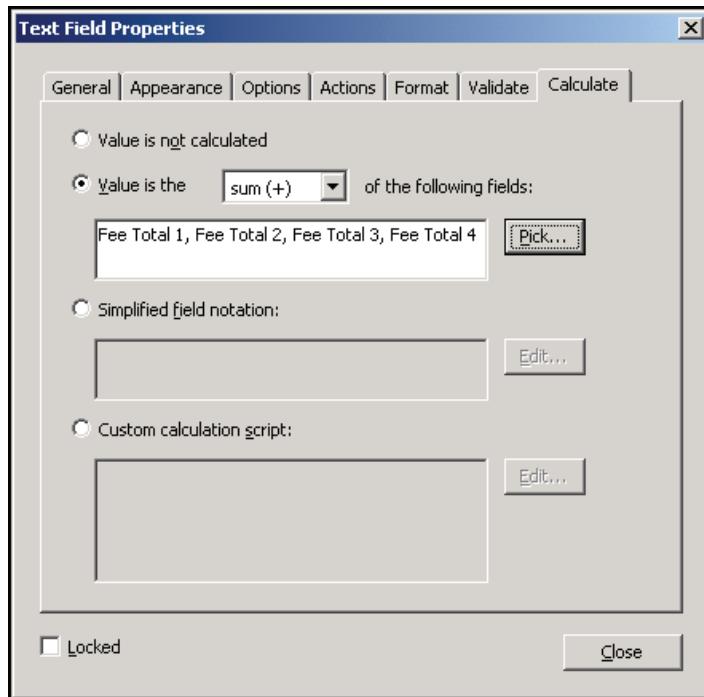
Select ‘**sum (+)**’ from the drop down.



5. Next, Acrobat must be told which fields to sum. This is done using the **Pick...** button. When the button is pressed, a dialog box containing a list of the available form fields will appear.

Select ‘**Fee Total 1, Fee Total 2, Fee Total 3, Fee Total 4**’ and click the ‘OK’ button.





6. Click the **Close** button to close the Field Properties then the **Hand Tool** to activate the form.

The table should look like this:

Show Retaliatory Fee Calculation	Fee Total
Total of Retaliatory Fees for this Filing Submission	\$0.00

The zeros are displayed in the “Total of Retaliatory Fees” cell because no values have been entered into the cells above it. Once those values are entered, the sum will be calculated and displayed in the cell.