

Adobe® Acrobat® 4.0

Tips for Business Professionals





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# Adobe Acrobat

The essential **tool** for

universal **document exchange**

# The Value of Adobe PDF and Adobe Acrobat 4.0

Adobe Acrobat software is simply the most reliable and effective way to share information across platforms and applications. With Acrobat, you can convert documents from any application to Adobe Portable Document Format (PDF), which preserves the look and feel of your original document—including the fonts, layout, and graphics—in one compact file. Then you can distribute your Adobe PDF files to anyone, anywhere. Your recipients can view and print your documents from any computer with the free Acrobat Reader software. And with the review and mark-up tools in Acrobat 4.0, you can add comments directly to your Adobe PDF file without altering the original file. Highlight sentences, strike through words, and even attach electronic sticky notes. With Acrobat 4.0 software, you can get feedback from your colleagues in no time while preserving the look and feel of your original files. The following pages show you how to easily convert any document to a universally accessible Adobe PDF document. We'll also share some time-saving tips that can help you get your documents approved faster, so you can be more productive.

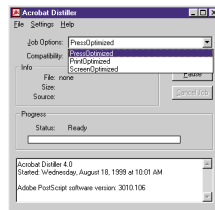
# Setting Up Acrobat Distiller®

The Acrobat Distiller application creates Adobe PDF files. You do not need to manually launch Distiller when you want to convert a document. However, you do need to run Distiller to choose a default setting before you create Adobe PDF files. Three options are available:

- *The ScreenOptimized option* is recommended for Adobe PDF files that will be displayed on the World Wide Web or an intranet. If you know that the document you're converting will not be printed, you should choose this option because it produces the smallest possible file size, which reduces the time it takes to move the file over a network or the Web.
- *The PrintOptimized option* is recommended for Adobe PDF files that will be printed or published on CD-ROM. In general, if the document you're converting will be printed—or if there's a possibility it will be printed—you should choose this option.
- *The PressOptimized option* is recommended for Adobe PDF files that will be printed as high-quality final output using a high-resolution printer. This option is primarily for graphic-intensive publications created with illustration and page layout programs.

## To set Distiller defaults:

- 1 Launch Acrobat Distiller.
- 2 Click the Job Options pull-down menu, and then select the appropriate option—ScreenOptimized, PrintOptimized, or PressOptimized—depending on how the Adobe PDF file will be used.
- 3 Choose File > Preferences. In the Output Options area of the Preferences dialog box select Ask for PDF File Destination and View PDF When Using Distiller Printer.
- 4 Click OK to close the Preferences dialog box, and then quit Acrobat Distiller. Acrobat Distiller will retain the default settings until you change them.



Click the Job Options pull-down menu, and then choose ScreenOptimized, PrintOptimized, or PressOptimized, depending on how your Adobe PDF file will be used.

In the Preferences dialog box, select Ask for PDF File Destination and View PDF When Using Distiller Printer.

# Creating Adobe PDF Files

Preserve the look and feel of your documents by converting them to Adobe's universal Portable Document Format. This section shows you how to create Adobe PDF files from popular business applications. Each page gives step-by-step instructions. Before you begin, make sure you have installed Acrobat 4.0 software and have set up Acrobat Distiller as explained on page 4.

## **Creating Adobe PDF files with the following applications:**

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Publisher
- Adobe PageMaker *Plus*
- Corel WordPerfect
- Lotus 1•2•3
- Lotus Notes
- Adobe Acrobat Paper Capture
- Adobe Acrobat Web Capture

# Microsoft Word

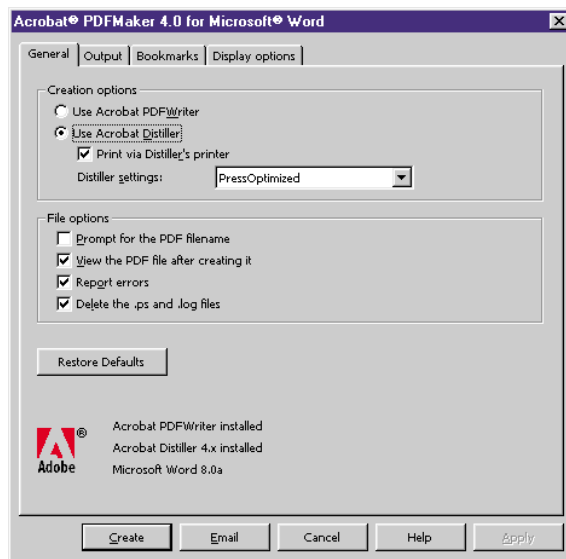
## **To create an Adobe PDF document from Microsoft Word:**

- 1** Open the document in Microsoft Word.
- 2** Click the Create Adobe PDF button in the toolbar or choose File > Create Adobe PDF.
- 3** Click Create in the Acrobat PDFMaker 4.0 for Microsoft Word dialog box.

When you click Create, the Adobe PDF file is generated, placed in the same folder as the original document, and then opened in Acrobat.



Click the Create Adobe PDF button in the toolbar, or choose Create Adobe PDF from the File menu to display the Acrobat PDFMaker dialog box.



In the Acrobat PDFMaker dialog box, specify settings for your PDF file.

# Microsoft Excel

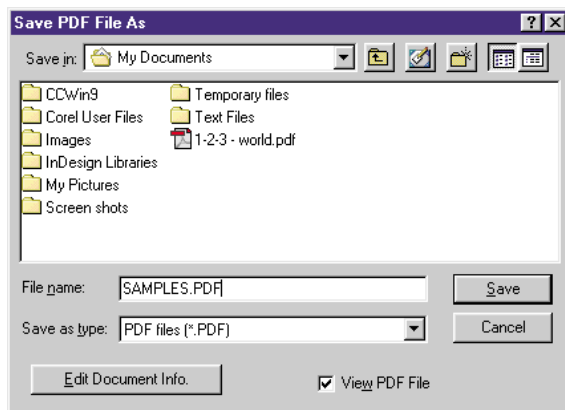
## **To create an Adobe PDF document from Microsoft Excel:**

- 1** Open the document in Microsoft Excel.
- 2** Click the Create Adobe PDF button in the toolbar, or choose File > Create Adobe PDF.

When you click the Create Adobe PDF button, the Save PDF File As dialog box is displayed. Choose a storage folder, and specify a filename for the PDF file, and then click Save. The PDF file is created and then opened in Acrobat.



Click the Create Adobe PDF button in the toolbar to display the Save PDF File As dialog box.



In the Save PDF File As dialog box, choose a storage folder and specify a filename for the Adobe PDF file.

# Microsoft PowerPoint

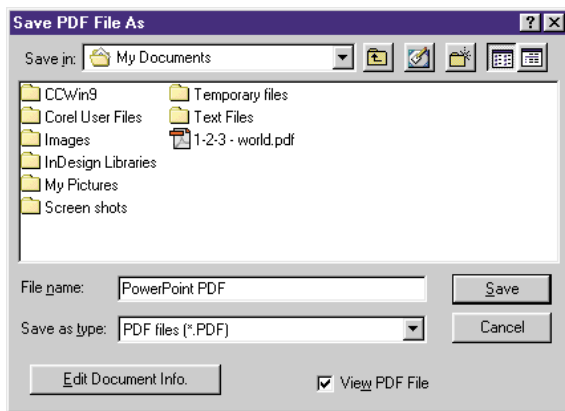
## **To create an Adobe PDF document from Microsoft PowerPoint:**

- 1** Open the document in Microsoft PowerPoint.
- 2** Click the Create Adobe PDF button in the toolbar.

When you click the Create Adobe PDF button, the Save PDF File As dialog box is displayed. Choose a storage folder and specify a filename for the PDF file, and then click Save. The PDF file is created and then opened in Acrobat.



To create an Adobe PDF file, click the Create Adobe PDF button in the toolbar.



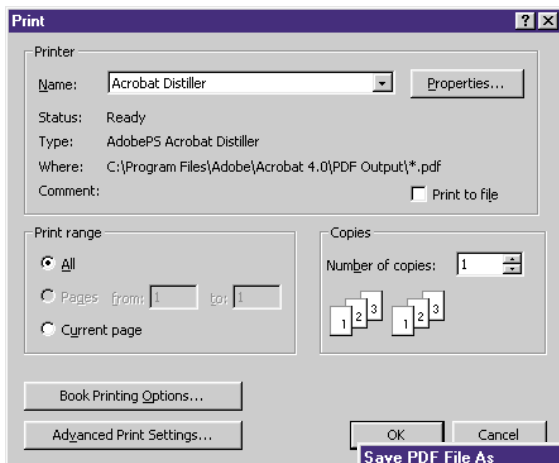
In the Save PDF File As dialog box, choose a storage folder and specify a filename for the Adobe PDF file.

# Microsoft Publisher

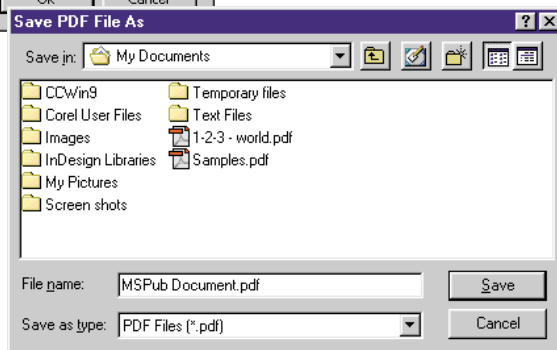
## **To create an Adobe PDF document from Microsoft Publisher:**

- 1** Open the document in Microsoft Publisher.
- 2** Choose File > Print.
- 3** In the Print dialog box, choose Acrobat Distiller from the Printer Name pull-down menu.
- 4** Click OK to close the dialog box and generate an Adobe PDF file.

When you click the OK button, the Save PDF File As dialog box is displayed. Choose a storage folder, specify a filename for the PDF file, and then click Save. The PDF file is created and then opened in Acrobat.



Make sure Acrobat Distiller is selected in the Print dialog box's Printer Name pull-down menu.



In the Save PDF File As dialog box, choose a storage folder and specify a filename for the Adobe PDF file.

# Adobe PageMaker® *Plus*

PageMaker *Plus* offers two methods for creating Adobe PDF files. You can:

- Click the Adobe PDF button in the toolbar.
- Choose File > Export > Adobe PDF.

The first method is the fastest and easiest (and is explained on the right). The second method offers more control over the file you create. (For more information about using the Export Adobe PDF command, refer to the PageMaker *Plus* manual.)

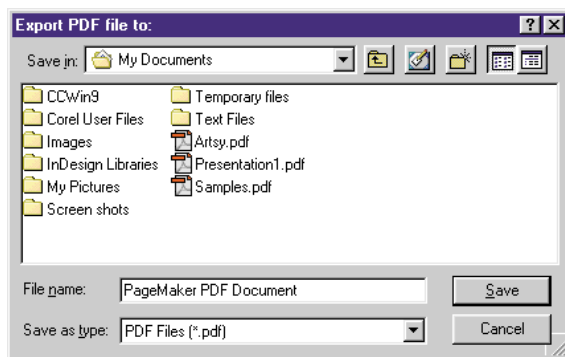
## **To create an Adobe PDF document from Adobe PageMaker *Plus*:**

- 1** Open the document in PageMaker *Plus*.
- 2** Click the Create Adobe PDF button in the toolbar.
- 3** In the Export PDF File To dialog box, choose a storage folder, and specify a filename for the Adobe PDF file. Make sure that PDF Files (\*.pdf) is selected in the Save As Type pop-up menu.
- 4** Click Save.

When you click Save, the Adobe PDF file is created and then automatically opened in Acrobat.



Click the Create Adobe PDF button in the toolbar to display the Export PDF File To dialog box.



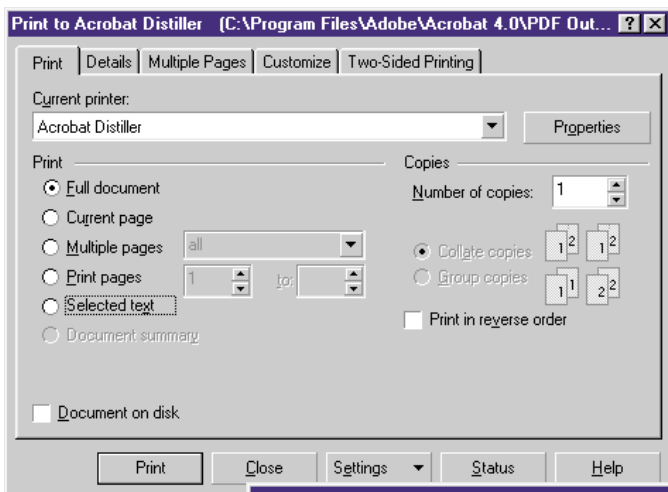
In the Export PDF File To dialog box, choose a storage folder, and specify a filename for the Adobe PDF file.

# Corel WordPerfect

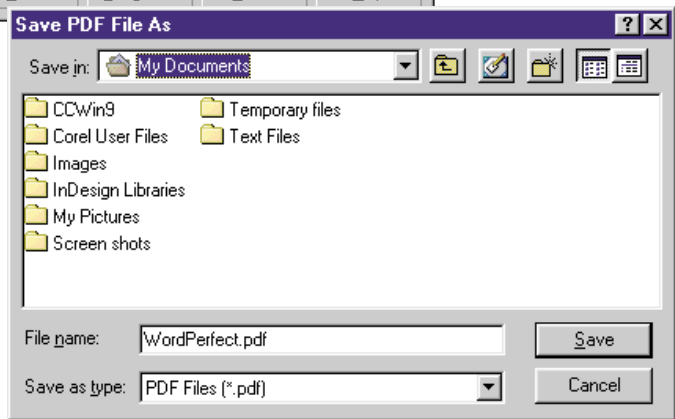
## **To create an Adobe PDF document from Corel WordPerfect:**

- 1** Open the document in WordPerfect.
- 2** Choose File > Print.
- 3** Choose Acrobat Distiller from the Current Printer pull-down menu, and then click Print.

When you click Print, the Save PDF File As dialog box is displayed. Choose a folder, and specify a filename for the PDF file, and then click Save. The PDF file is created and then opened in Acrobat.



Choose Acrobat Distiller from the Current Printer pull-down menu, and then click Print.



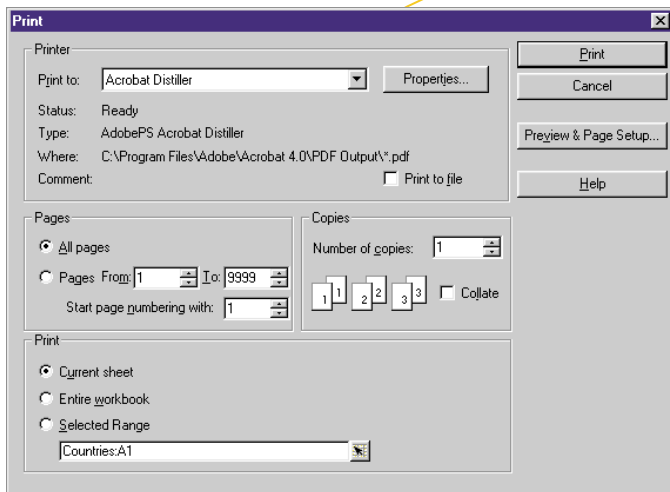
In the Save PDF File As dialog box, choose a storage folder, and enter a filename for the Adobe PDF file.

# Lotus 1•2•3

## **To create an Adobe PDF document from Lotus 1•2•3:**

- 1** Open the document in Lotus 1•2•3.
- 2** Choose File > Print.
- 3** In the Print dialog box, choose Acrobat Distiller from the Print To pull-down menu.
- 4** Click Print to close the dialog box and generate an Adobe PDF file.

When you click Print, the Save PDF File As dialog box is displayed. Choose a storage folder and specify a filename for the PDF file, and then click Save. The PDF file is created and then opened in Acrobat.

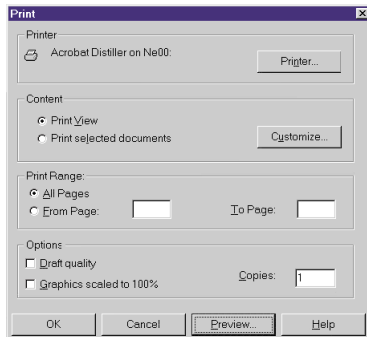


Make sure that Acrobat Distiller is selected in the Print dialog box's Print To pull-down menu.

# Lotus Notes

## To create an Adobe PDF file of a view of a Lotus Notes database:

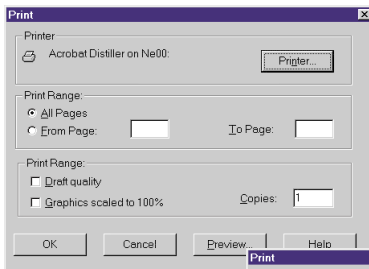
- 1 Choose File > Print.
- 2 In the Print dialog box, click Printer.
- 3 In the Print Setup dialog box, choose Acrobat Distiller, and then click OK.
- 4 Click Print View.
- 5 Click OK.



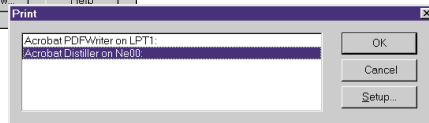
In the Print dialog box, click Printer and then choose Acrobat Distiller; click Print View and then click OK.

**To create an Adobe PDF file of a document contained in a Lotus Notes database:**

- 1 Open the document.
- 2 Choose File > Print.
- 3 In the Print dialog box, click Printer.
- 4 Choose Acrobat Distiller.
- 5 Click OK.



In the Print dialog box, click Printer and then choose Acrobat Distiller.



Choose Acrobat Distiller in the Print Setup dialog box.

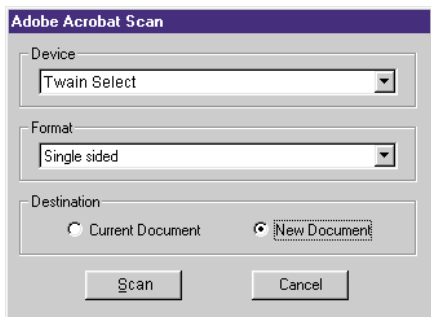
# Adobe Acrobat Paper Capture

The Adobe Acrobat Paper Capture plug-in combines the best of both worlds. The Acrobat Paper Capture plug-in lets you convert paper documents to electronic files in Adobe PDF, which accurately reproduces the look and feel of the printed page, complete with fonts, graphics, and formatting, as well as color, black-and-white, and grayscale images. Adobe PDF files are fully searchable, and you can add annotations, cross-document links, and bookmarks to help viewers navigate quickly.

## **To create an Adobe PDF document with Adobe Acrobat Paper Capture:**

- 1** Make sure your scanner is installed correctly and functioning properly, independently of Acrobat.
- 2** Launch Acrobat.
- 3** Place the first page of a paper document in the scanner. Choose **File > Import > Scan**.
- 4** Choose a scanner and a page format from the respective pull-down menus. (The Device pull-down menu displays all TWAIN drivers and Photoshop® Acquire plug-ins installed on your computer.)

- 5 Click Current Document to add scanned pages to the end of the current Adobe PDF file (if a document is open); click New Document to create a new Adobe PDF file.
- 6 Click Scan.
- 7 Set scanning options using the available controls. Usually, you need to click a Scan button or choose a comparable command after you've finished setting options (refer to your scanner documentation).
- 8 For each additional page you want to add, click Next in the dialog box that's displayed after you scan a page.
- 9 After you scan the final page, click Done. The pages you scanned are displayed in a new Adobe PDF file.



Choose a scanner from the Device pull-down menu, a page format (for the resulting Adobe PDF file) from the Format pop-up menu, and click Current Document or New Document.

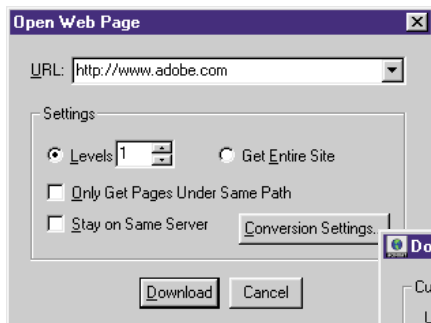
# Adobe Acrobat Web Capture

Adobe Acrobat lets you convert a Web page or an entire Web site to a single Adobe PDF document with all links intact for offline viewing. You can even archive your Web site or capture Web pages on competitors' sites for easy reference and research, or incorporate converted Web pages into other PDF documents. All you have to do is provide Acrobat with the location of the Web pages. Acrobat converts and then opens the pages in a single step.

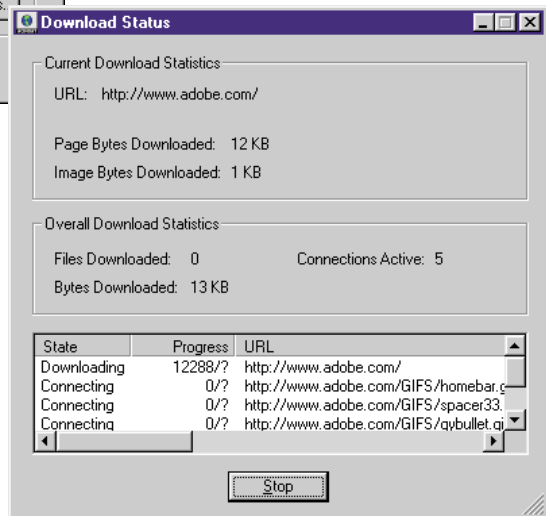
## **To convert Web pages to an Adobe PDF file with Adobe Acrobat Web Capture:**

- 1** In Acrobat, choose File > Open Web Page.
- 2** In the Open Web Page dialog box, type the URL.
- 3** Choose Levels, and specify the number of levels you want to include, or choose Get Entire Site.
- 4** If you selected Levels, click Only Get Pages Under Same Path to download only pages that are subordinate to the specified URL; click Stay on Same Server to download only pages that are on the same server as the specified URL.
- 5** Click Download.

**Note:** To take advantage of Web Capture, you must have Internet Explorer 4.0 or later installed, and you also need access to the World Wide Web.



In the Open Web Page dialog box, enter the URL of the Web page you want to download and specify other options as necessary.



The Download Status window is displayed as you download Web pages.

# Streamlining Document Review and Mark-up

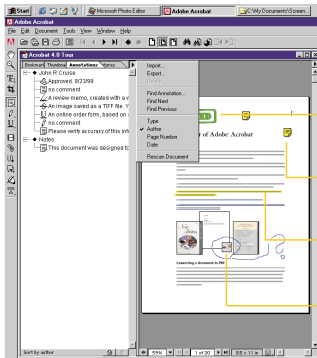
With the powerful review and mark-up tools in Acrobat 4.0 software, you can streamline your document review and approval process. Now that you have converted your original files to Adobe PDF, you can take advantage of a host of features to manage your documents efficiently. Use the powerful Acrobat annotation tools to edit Adobe PDF files on-screen. Preview longer documents in no time by using the thumbnail format. Navigate your documents easily with bookmarks, and protect sensitive information with digital signatures. This section shows you how.

## **Using electronic annotation and navigation tools for internal and external review:**

- Annotation Tools
- Mark-up Tools
- Thumbnails and Bookmarks
- Comparing Adobe PDF Documents
- Digital Signatures

# Annotation Tools

With Adobe Acrobat, you can electronically apply comments—such as electronic sticky notes, highlights, strikethroughs, and digital stamps—to your Adobe PDF documents. Electronic annotations are a great way to share comments because they're part of the Adobe PDF file and they travel with it.

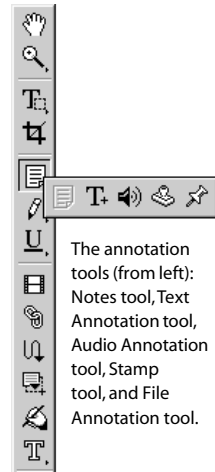


Add any of several built-in stamps or create your own custom stamps.

Add electronic sticky notes without affecting the original layout.

Use the text mark-up tools to highlight, strike through, or underline text.

Use the graphic mark-up tools to add handwritten notes and edits.



The annotation tools (from left):  
Notes tool, Text Annotation tool, Audio Annotation tool, Stamp tool, and File Annotation tool.

The *Notes tool* lets you add electronic notes to any page in an Adobe PDF document. Users can open, close, move, resize, and scroll a note window, which enables reviewers to enter as much text as they want. These electronic sticky notes are ideal for making long, in-depth comments. They can be sorted, imported, exported, deleted, and summarized for at-a-glance review.

**To add a note:** 

- 1 Select the Notes tool from the toolbar.
- 2 Click the spot where you want to place the note.
- 3 Type your comments in the note window.

You can close the note window when you finish typing your comments. To delete a note, select it and choose Edit > Delete.

Do you want to make sure no one misses your edits? Use the *Text Annotation tool* to type short comments right in the PDF file. The text annotation remains visible on the page at all times and cannot be closed.

**To add a text annotation:** 

- 1 Select the Text Annotation tool from the toolbar.
- 2 Click and drag a rectangle to the spot where you want to place the annotation.
- 3 Type your comment.
- 4 Click outside the rectangle.

You can change the font, color, and size of a text annotation. To do so, select a text annotation and then choose Edit > Properties. To delete a text annotation, select it and then choose Edit > Delete.

The *Audio Annotation tool* lets you record and attach verbal comments to an Adobe PDF document. You can record voice messages with detailed instructions or descriptions and include them with your other comments in one file. Now you can really say what you mean. (You must have a microphone attached to the audio port of your computer to record an audio annotation, and your computer must have a sound card to play an audio annotation.)

#### **To add an audio annotation:**



- 1 Select the Audio Annotation tool from the toolbar.
- 2 Click the spot where you want to place the audio annotation.
- 3 Click Start in the Audio Annotation dialog box, and speak into the microphone.
- 4 Click Stop when you've finished speaking.

You can change the color and author of an audio annotation and add a description to it. To do so, select an audio annotation and choose Edit > Properties. To delete an audio annotation, select it and choose Edit > Delete.

The *Stamp tool* lets you apply a digital stamp to documents just as you would use a rubber stamp on paper. Use one of several built-in stamp designs, such as "Approved" and "Draft," or create your own stamps. You can even add a note to your stamp.

#### **To stamp a document:**



- 1 Select the Stamp tool from the toolbar.
- 2 Click the spot where you want to place the stamp.

To change a stamp's graphic, select it and choose Edit > Properties. To add a note to a stamp, double-click on it. To delete a stamp, select it and choose Edit > Delete.

The *File Annotation tool* lets you embed a file in an Adobe PDF document. Rather than setting up a link to another file, you can add that file to the Adobe PDF document—now it's one attachment. So, when you move the Adobe PDF document or e-mail it to a colleague, the embedded file automatically stays with the Adobe PDF file.

### To attach a file:

- 1 Select the File Annotation tool from the toolbar.
- 2 Click the spot where you want to attach a file.
- 3 Select the file you want to attach.
- 4 Click Open.
- 5 In the File Annotation dialog box, specify the properties of the annotation and then click OK.

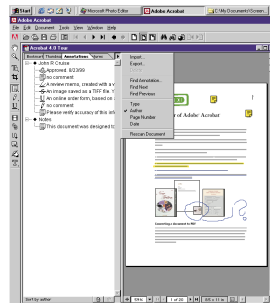
When you double-click the icon of a file attachment, the file is opened in the originating application—if the application is available. To delete a file annotation, select it and then choose Edit > Delete.

You can use the *Annotations palette* to sort and navigate through multiple comments.

### To use the Annotations palette:

- 1 Choose Window > Show Annotations.
- 2 Click the right arrow at the top right of the Annotations palette to display the palette's pop-up menu.
- 3 Choose Rescan Document from the pop-up menu.
- 4 To sort the annotations, choose Type, Author, Page Number, or Date from the pop-up menu.

The Annotations palette lists all annotations in an Adobe PDF file and displays them by type, author, page number, or creation date.



The Annotations palette lists all the annotations in an Adobe PDF file and lets you sort them by type, author, page number, or creation date.



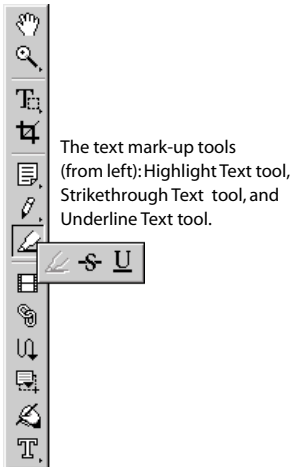
## TEXT MARK-UP TOOLS

With the Text mark-up tools, you can highlight, strike through, and underline text just like you do on paper.

The *Highlight Text tool* acts like a felt-tip pen and lets you draw attention to text strings by applying a highlight color of your choice.

The *Strikethrough Text tool* draws a horizontal line through selected text—it's handy for marking text that needs to be deleted.

The *Underline Text tool* underlines selected text.



### To highlight, strike through, or underline text:

- 1 Select the appropriate tool from the toolbar.
- 2 Place the cursor at the beginning of the text you want to mark up, click and drag the cursor across the text you want to select, and then release the mouse button when the text is highlighted.

You can change the color and author of marked-up text. To do so, select the text and choose Edit > Properties. To remove the highlight, strikethrough, or underline applied to the text, select the text and choose Edit > Delete.

# Thumbnails and Bookmarks

When you create Adobe PDF documents, it's important to provide readers with navigation tools that allow them to move quickly through the pages of a single document and among several documents. Two of Acrobat software's most useful navigation tools are thumbnails and bookmarks.

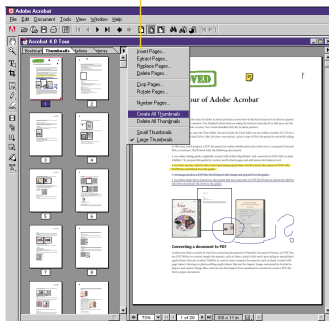
## THUMBNAILS

Thumbnails display miniature previews of the pages in an Adobe PDF document. When thumbnails are displayed, you can double-click on a page preview to display a particular page.

### To create thumbnails:

- 1 Choose Window > Show Thumbnails.
- 2 Choose Create All Thumbnails from the Thumbnails palette's pop-up menu (the right arrow in the palette). To remove thumbnails, choose Delete All Thumbnails from the pop-up menu.

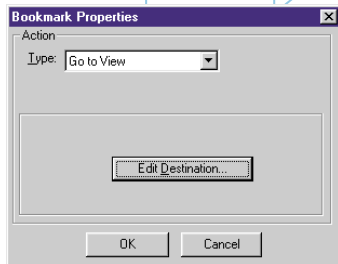
The Thumbnails palette's pop-up menu lets you create and delete icons for thumbnails and perform several other page-related tasks.



The Acrobat Navigation pane displays separate palettes for bookmarks, thumbnails, annotations, and digital signatures. In this example, thumbnails are displayed.

## BOOKMARKS

Bookmarks in an Adobe PDF document behave like a table of contents by listing each section and subsection of the document and allowing you to navigate quickly to a particular page or section. Not only can you use bookmarks to jump from page to page within a document, but you can also jump to linked documents (PDF or non-PDF) or to Web pages. To display bookmarks, choose Window > Show Bookmarks.

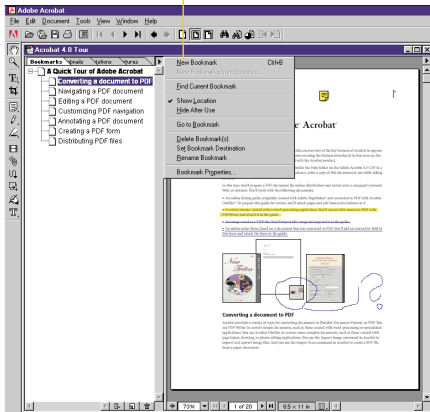


The Bookmark Properties dialog box lets you apply an action to a bookmark.

### To create a bookmark:

- 1 Choose Window > Show Bookmarks.
- 2 Use the Next Page and Previous Page arrows in the command bar to navigate to the page you want the bookmark to link to.
- 3 Choose New Bookmark from the Bookmarks palette's pop-up menu (the right arrow in the palette). The new bookmark is displayed in the palette.
- 4 Type in the label for the bookmark, and then press Enter. When you've finished, you should test the bookmark by navigating to another place in the document and then clicking the bookmark. Follow the same steps to create additional bookmarks. You can click and drag bookmark icons to arrange bookmarks in any order you like.

The Bookmarks palette's pop-up menu lets you create and delete bookmarks and perform other navigation-related tasks.



Here you see bookmarks displayed in the Navigation pane. Clicking on a bookmark displays the associated page.

You can also link an action to a bookmark. For example, you can click a bookmark to execute a menu command, play a sound, or change the magnification. To link an action to a bookmark, select the bookmark and choose Edit Properties. Then use the controls in the Bookmark Properties dialog box to specify an action. To delete a bookmark, select it and choose Delete Bookmark from the Bookmarks palette's pop-up menu.

# Comparing Adobe PDF Documents

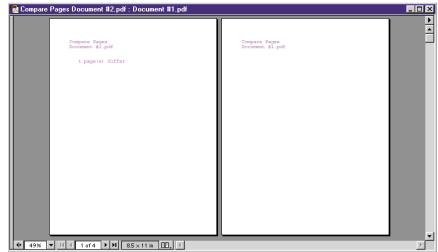
With the Acrobat Compare Pages tool, you can open two or more PDF files in tiled windows for side-by-side on-screen comparison of different versions of the same document and to identify even the most subtle differences between them.

## To compare pages in two Adobe PDF documents:

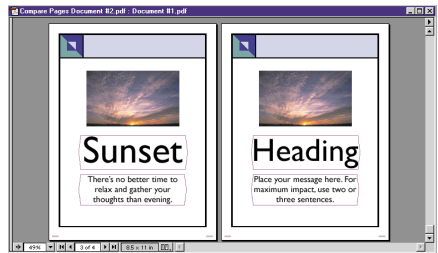
- 1 Open the two documents you want to compare.
- 2 Choose Tools > Compare Pages.

Note that the active document will appear on the right of the resulting file.

When you choose Compare Pages, Acrobat automatically generates a new Adobe PDF document that contains a summary page that describes how many pages were modified, added, moved, or deleted. The rest of the document shows side-by-side views of pages that differ, with each difference highlighted on both pages.



After you compare pages of two Adobe PDF documents, a new comparison file is created. Here you see the first page of the comparison file, which displays the names of the two documents and the number of pages (2) within those documents that are different.



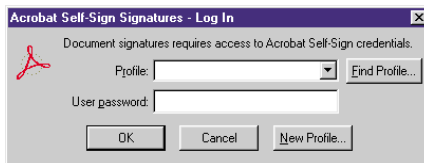
Here you see the second page of the comparison file, which displays the first page of the two Adobe PDF documents and highlights elements that are different.

# Digital Signatures

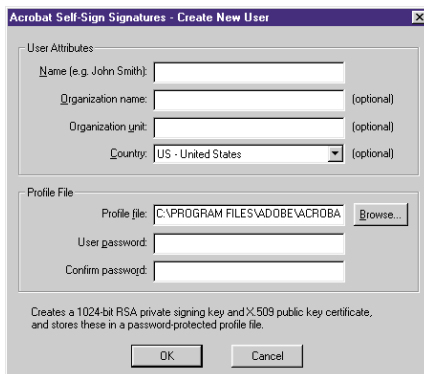
Digital signatures act like conventional signatures—allowing you to sign off on electronic documents. You can simply attach your digital signature to the document. In addition, a signature stores information, such as the date and time, and allows you to track document versions and validate their authenticity.

## To create a digital signature profile:

- 1 Choose Tools > SelfSign Signatures > Log In.
- 2 In the Acrobat SelfSign Signatures—Log In dialog box, click New Profile.
- 3 In the User Attributes area of the Acrobat SelfSign Signatures—Create New User dialog box, enter your name and any other information you want to include in the three optional fields.
- 4 In the Profile File area of the Acrobat SelfSign Signatures—Create New User dialog box, enter the pathname for the folder in which you want to store your profile file, or click Browse and choose a folder. Enter a password (six characters or longer) in the User Password and Confirm Password fields, and then click OK.



Choose your profile from the pull-down menu and enter your password in the Acrobat SelfSign Signatures—Log In dialog box.



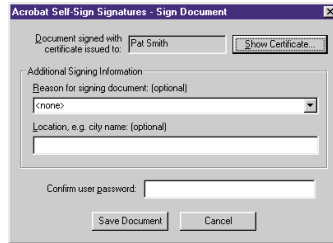
In the Acrobat SelfSign Signatures—Create New User dialog box, enter information in the User Attributes and Profile File fields.

## To add a digital signature to a document:

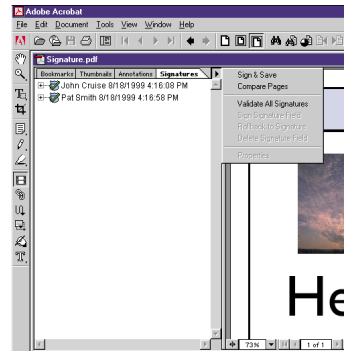
- 1 Select the Digital Signature tool in the toolbar, and then draw a rectangle over the area you want to place your signature.
- 2 In the Acrobat SelfSign Signatures—Sign Document dialog box, you can select an option from the Reason for Signing Document field. You can also enter a location in the Location field (such as a city name). (Note: If you're using a third-party signature handler, follow the instructions displayed on-screen. You may be prompted to log in to the handler or enter required information.)
- 3 Enter your password in the Confirm User Password field, and then click Save Document.

- 4 If this is the first signature on the document, the Save As dialog box will be displayed. Enter a name, choose a location for the file, and then click OK.

To display the list of a document's signatures, click the Signatures tab in the Navigation pane. The Signatures palette's pop-up menu contains several commands for working with digital signatures; the Properties command lets you see the attributes of a digital signature.



In the Acrobat SelfSign Signatures—Sign Document dialog box, enter information in the Additional Signing Information area, and enter your password in the Confirm User Password field.



The Signatures palette displays a list of all digital signatures attached to a document.

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