



# PDF FROM START TO FINISH

## Creating a Digital Grants Library

Presentation to the  
Grants Managers' Network  
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**Jean M. Browne**

**Information Conservancy**

113 Hudson Terrace • Yonkers, NY 10701

914.969.7439 Tel • 914.969.7459 Fax

[jmbrowne@iconservancy.com](mailto:jmbrowne@iconservancy.com)



# PDF FROM START TO FINISH

## Outline

- I. PDF Basics**
- II. Examples**
- III. Creating PDF Documents**
- IV. Tools**
- V. Digital Signatures**
- VI. Resources**



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## I. PDF Basics

### What is PDF?

- Portable Document Format
- Developed in late 1992 by Adobe
- Platform & application independent
- Universally used - 50,000 downloads daily
- Much more than just a file sharing utility



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## I. PDF Basics

### Components of Acrobat Software

- **Adobe Acrobat Reader**
  - Read PDF files
  - Download for free
  - Reader vs. Reader+Search
- **Adobe Acrobat (full version)**
  - Writes PDF files
  - Costs about \$220 for single user
- **Adobe Distiller**
  - Part of full version
  - Converts postscript files
  - Used for graphically complex files (.eps)
- **PDF Writer**



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## I. PDF Basics

### Benefits

- Widely used
- Viewable on any computer for free
- Compressed format
- Appears and prints like the original without the software
- Format is web-ready
- Navigational - interactive interface
- Security - digital signatures



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## II. Examples

### Uses

- Song books, photos, recipes, special paper
- Brochures, flyers, presentations
- Articles, Manuals
- Tax returns & audits
- Estate documents
- Contracts & Agreements
- Key documents
- Board books
- Grant files
- Complete Web sites



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## II. Examples

### Sample Documents

- Fun stuff
- Interactive
- Photos
- Web sites
- Grants-related examples
  - 501c3
  - Signed Agreement with changes
  - Article from *Foundation News & Commentary*
  - Brochure - Training Materials
  - Estate Documents
  - Audited Financial Statement
  - Database Manual
  - Minutes & Resolutions Book
  - Policies & Guidelines
  - Board Books
  - Sample Grant File



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## III. Creating PDF Documents

### Source Determines the Process

#### From existing computer file

- Enhance formatting
- File / Print / Choose PDF Writer

#### From online resources

- Tools / Web capture
- Edit / nest bookmarks

#### From scanned documents

- Scan document
- Clean; rotate
- File / Print / Choose PDF Writer





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## III. Creating PDF Documents

### Scanning Tips

- 72 dpi for viewing
- 150 dpi for printing
- 300 for OCR (always proof!)
- 300-600 dpi for line art
- Archive hi-res version
- Create separate view & print versions
- Always run a print test (resolution test)
- Printer driver & quality problems



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## III. Creating PDF Documents

### Formatting Tips

- Use color for headings even if it will be printed in black & white.
- No underlining; use all caps sparingly.
- Single space at end of sentences.
- Use nested indents and block format.
- All pages must contain headers with name of document, date and page number.
- Use standard fonts (Helvetica/Arial; Times/Times New Roman).
- Headers should be sans serif (Helvetica/Arial) fonts; serif for text (Times/Times New Roman)



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## III. Creating PDF Documents

### Process Issues

- **Schedule** What is the conversion schedule?
- **Process** Who will manage the process?
- **Metadata** Who will maintain records of conversions?
- **Type** Will it be an archive or working document?
- **Source** Do originals exist? Is scanning required?
- **Format** Is a template needed for consistency?
- **Security** What are the current and future issues?
- **Guidelines** Do guidelines exist for the process?
- **Planning** What should the final document be named?
- **Archives** What happens to the original documents?
- **Backup** Special considerations? Notification required?



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## III. Creating PDF Documents

### Compiling a Large PDF Document

- Always work off a back up of the originals
- Name originals in numerical order by section
- Use 2-3 character numbers to keep in order
- Open document 01 - Save As to preserve
- Set up Document info / Security / Open Document / Insert pages
- Compile sections separately with bookmarks
- Extracting / replacing pages
- Keep pages in order - check with thumbnails
- Crop for viewing
- Bookmarks / links - be consistent
- Compress document - Save As
- Backup immediately
- Check against originals



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## III. Creating PDF Documents

### Metadata

- **Descriptive - describing resource**  
Included in version 5.0  
Original resource
- **Structural - navigation and presentation**  
Templates, fonts, formatting  
Relationship of material to other documents
- **Administrative - short & longterm management**  
Technical data (scanner model, resolution, bit depth)  
Management (access, quality control, use, rights)  
Timeline (conversion & backup schedules)
- **Within Acrobat 5.0**  
File / Document Properties / Document Metadata



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## IV. Tools

### Toolbar



Open, Save, Print, E-mail



Find, Search, Search Results



Previous Highlight, Next Highlight



Show/Hide Navigation Pane



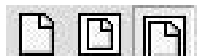
First page, Previous page, Next page, Last page



Previous View, Next View



Zoom out, View Percentage, Zoom in



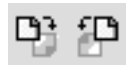
Actual Size, Fit Window, Fit Width



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## IV. Tools

### Toolbar, con't



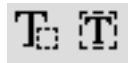
Rotate View Clockwise, Rotate View counterClockwise



Hand Tool



Zoom In, Zoom Out



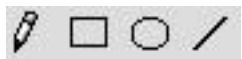
Text Select, Column Select



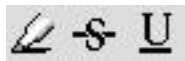
Graphics Select



Note, Free Text, Sound Attachment, Stamp, Attachment



Pencil, Square, Circle, Line



Highlight, Understrike, Underline



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## IV. Tools

### Toolbar, con't



Spellcheck Form Fields and Comments



Digital Signature Tool



Movie Tool



Link Tool



Article Tool



Crop Tool



Form Tool



TouchUp Text, TouchUp Object, TouchUp Order



Bookmark ▾

Add bookmark, Delete Bookmark





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## V. Digital Signatures

### In the US

44 States have adopted electronic signature guidelines.

Uniform digital signature laws are needed to create uniform digital signature guidelines.

#### **Benefits:**

- Provides data integrity - recipient can tell whether or not the data has been tampered with
- Provides confidentiality - document is encrypted
- Provides non-repudiation - you can't deny you sent or received it
- Provides authentication of sender and receiver



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## V. Digital Signatures

### Distinctions . . .

- **Are often thought of as**  
A computer transmission of one's name in print  
A scanned or facsimile of a signature.
- **Definition if much broader . . .**  
PIN numbers  
Thumbprints  
Retinal scanning
- **Passwords**  
Prevent an unauthorized person from gaining access
- **Digital Signatures**  
Can show if a file has been tampered with since it was last signed



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## V. Digital Signatures

### Digital Signatures in Acrobat

- You can digitally sign a document to ensure that any changes you make to the document are preserved. If any changes are made to the document after you sign it, you can roll back to recover the version that you signed.
- You can verify another person's digital signature to verify that their signature is authentic. The verification process uses a user certificate that the signer makes available to you.
- You can review all the signatures on a document in the **Signatures** palette, you can retrieve any signed version of a document.



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## V. Digital Signatures

### Digital Signatures in Acrobat

- You can use the **Compare Two Versions Within a Signed Document** command to compare different versions of a signed document.
- You can create different identities (digital signatures) for yourself if you handle documents in more than one capacity.
- You can create a signature that uses or includes a graphic such as your company logo.
- You can encrypt a PDF document for distribution to selected recipients.



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## V. Digital Signatures

### Digital Signatures in Acrobat

- A document can be signed more than once and by more than one person.
- First time - saved in an append-only form that can be appended but not altered. Every time the document is signed after that, the new signature and any changes made since the preceding version are appended to the file.
- When you view a document with more than one signature, you're viewing the most recent version, but you can open an earlier version in a separate file and compare the two versions to see changes between them.



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## V. Digital Signatures

### Digital Signatures in Acrobat - Warnings

- Because a document is saved in append-only form the first time it is signed, you can only append changes to the file using **Save As**.

Using **Save** (full save) will invalidate all signatures.

- You can trash a document you do not have access to!



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## VI. Online Resources

### Web Sites

- [www.adobe.com](http://www.adobe.com)  
[Create Adobe PDF online - Fee service]
- [www.planetpdf.com](http://www.planetpdf.com)
- [www.pdfzone.com](http://www.pdfzone.com)
- [www.library.cornell.edu/preservation/tutorial](http://www.library.cornell.edu/preservation/tutorial)  
[Digital Imaging Tutorial]
- [www.iconservancy.com](http://www.iconservancy.com)