

Adobe Acrobat - Creation and management of forms and security of PDF documents

Duration: 1 day

Audience: Pour tous

Who is this training for?

Anyone using PDF documents or responsible for information management

Training objectives

- Understand the concept of a form
- Discover how to create a dynamic form from a template designed in Microsoft Word.
- Add and manage form fields
- Distribute forms to recipients and track the status of responses.
- Encrypt PDF documents
- Create and manage protection policies

Summary

Interactive forms streamline the procedure of filling out forms and gathering information. Learn all the technical aspects of transforming a scanned, blank document or a composite template in Microsoft Word, into a dynamic PDF form. Stay in control of various aspects of your interaction with form fields, distribute your forms to recipients, and track the status of responses. When handling electronic documents, it is important that their protection is an integral part of your processes. Learn how to prevent PDF document information from being copied, printed, and modified with a password, redacted confidential content, and even deleted hidden data.

Course outline

Capsule 1 - CREATING A PDF FORM

- Understanding the concept of a form
- Sources for creating a form
-

Developing a form template : Creating the structured tabular format of the form using Microsoft WordFormatting and saving the template

- Converting the template to a PDF document
- Setting form preferences
- Using the Prepare Form tool
- Creating a form from an existing document (template)
- Creating a form from an existing document (template) scanned document
- Create a form from a blank document
- Explore form tools
- Edit existing text or images
- Add fields using the form field tools : Text Text field Checkbox Radio button List box Drop-down list Action button Image field Date field Digital signature field Barcode
- Form field properties
- Set common properties for the General and Appearance tabs
- Set specific properties for each form field
- Reproduce, delete form fields
- Align, position, and distribute form fields
- Order form fields : Check the tab order of fields Change the tab order of fields Set the Print and Reset Form buttons Use basic calculations in a PDF form Restrict form edits Extend form rights PDF to Adobe Acrobat Reader users (save form data, add text)

Capsule 2 - DISTRIBUTING AND TRACKING FORMS

- Distributing the form
- Using the tracker
- Collecting and managing data

Capsule 3 - SECURITY OF PDF DOCUMENTS

- Introduction to PDF document security
-

Striking out text and images

- Removing hidden data and metadata from a PDF document
- Viewing protections for a PDF document
- Encrypting a PDF document PDF document by password : From Adobe Acrobat From a Microsoft Office application From the Adobe PDF printer
- Set password protection options
- Password to open the document
- Password to access rights
- Encrypt a certificate PDF document
- Create a password protection policy Apply a protection policy Manage protection policies
- Create a secure electronic envelope

Approach and methodology

Targeted presentations, comprehensive demonstrations, and guided hands-on exercises leading to creating, distributing, and securing PDF forms.

Prerequisites

Hold an Adobe Acrobat Pro license

Recommendations

Experience with Adobe Acrobat Pro or Adobe Acrobat Reader