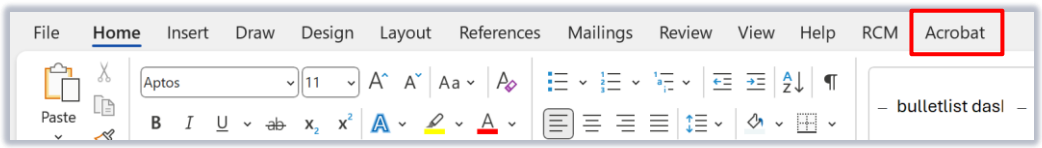
Using the Acrobat Tab in Microsoft Word

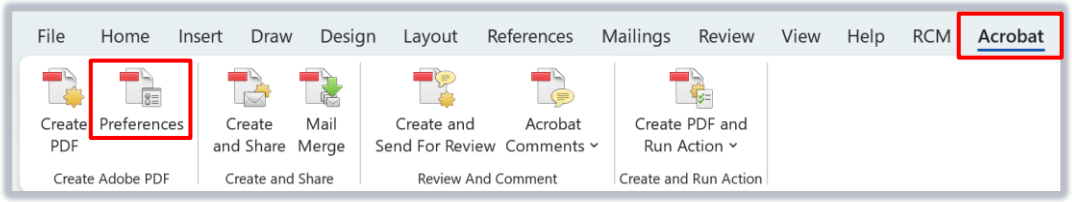
If you have Adobe Acrobat DC installed on your PC[1] , you'll see an additional **Acrobat** tab on Microsoft Word's ribbon.



- This tab indicates that the **Acrobat PDFMaker** Add-In is installed, giving you access to additional tools for creating PDFs and for setting PDF preferences such as security and print quality – all from within Word and without having to open Acrobat DC.
- This guide looks at Acrobat's **Preferences** and how you might use these settings. The settings you choose will depend on how you want to use the PDF you are creating.
- For full details of other settings found under the Acrobat tab, see Adobe's help page.

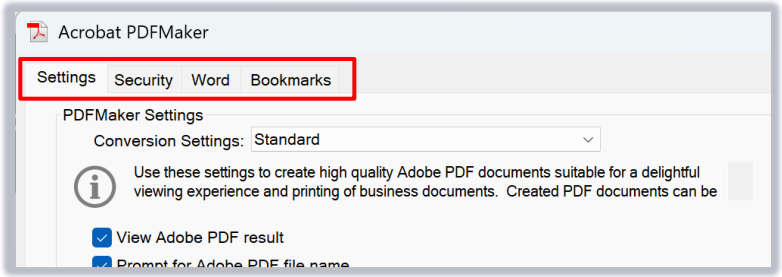
Locate the Acrobat tab and access Preferences

1. Launch MS Word and click on the **Acrobat** tab at the right of the Ribbon.
2. Click **Preferences** to configure your settings.



Note: Whatever settings you choose here will become your default once saved, but you can return at any time to change them.

3. The Acrobat PDFMaker dialog has four tabs: **Settings**, **Security**, **Word** and **Bookmarks**. We'll look at the options available under each of these tabs in detail.



[1] Don't have Acrobat DC? You can request the software for your University managed device via the IT Service Desk using MyIT.

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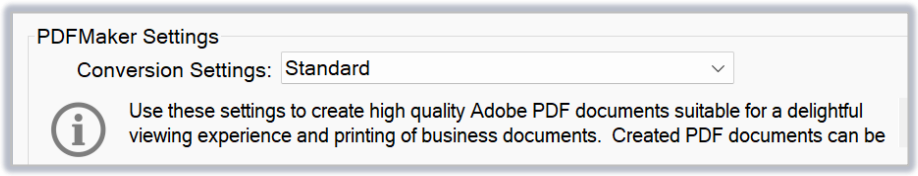
The Settings tab

PDFMaker Settings: Conversion Settings

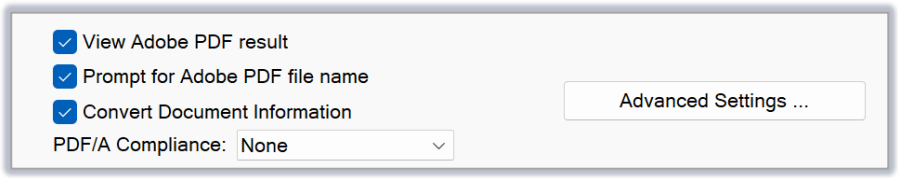
Conversion settings specify how Acrobat optimises the PDF. The default setting is **Standard**, but other options are available. For example, if you intend to print the PDF you might choose **High Quality Print**, whereas if you're going to publish the PDF online, you might choose **Smallest File Size** instead.



- Select the option you want from the drop-down menu.
- When you choose a setting, information about that pre-set is displayed immediately below it.

PDFMaker Settings: Other

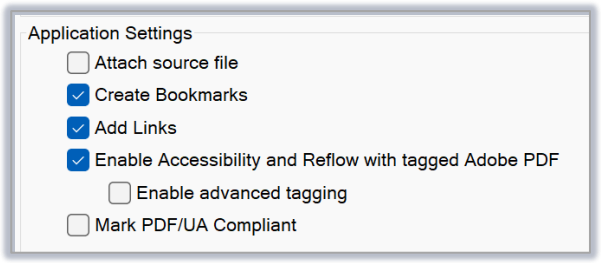
The remaining PDFMaker Settings default as shown below. You can change these if you want.



- **View Adobe PDF result:**
  If checked, the converted Word document will open automatically in Acrobat. The Word document will remain open.
- **Prompt for Adobe PDF file name:**
  If checked, Acrobat will prompt you to name your PDF and choose a location to save it to. If you don't tick this checkbox, Acrobat will give your PDF the same filename as the Word original but with a .pdf extension, and will save it in the same location.
- **Convert Document Information:**
  If checked, Acrobat will incorporate any additional document properties you have added to the Word document into the PDF.
- **PDF/A Compliance:**
  In most cases, leave this option set to **None**. If, however, you want the PDF to conform to ISO standards for long-term preservation of electronic documents, select the appropriate standard from the drop-down menu.
- **Advanced Settings:**
  Most of these settings are aimed at those creating PDFs for press quality print, e.g. options for compressing images, embedding fonts, and colour management. For everyday office use, it's unlikely you will need to use these.

Application Settings

The **Application Settings** default as shown below. You can change these if you want.



- **Attach Source File:**
  If checked, Acrobat will attach the Word document you're converting to the resulting PDF.
- **Create Bookmarks:**
  If checked, Acrobat will convert elements of your Word document (such as Headings and Styles) into bookmarks that will help readers navigate the PDF. You can decide exactly which elements to convert on the **Bookmarks** tab – see page 5 for guidance.
- **Add Links:**
  If checked, Acrobat includes any active links and hypertext you have inserted in the Word document in the PDF.
- **Enable Accessibility and Reflow with tagged Adobe PDF:**
  If checked, Acrobat will automatically embed document structure tags in the PDF. This means that the PDF will make sense to anyone using a screen reader or other text-to-speech tool.
- **Enable advanced tagging:**
  Only check this if your document has a form in it.

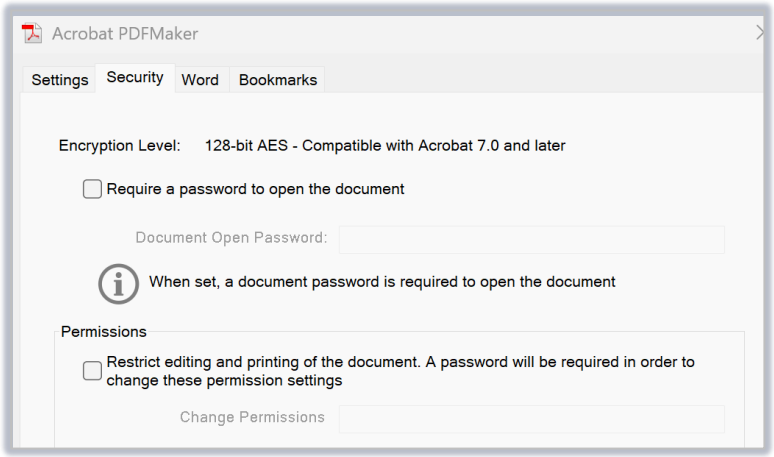
  Note: Your PDF will only be fully accessible if you have structured your Word document with accessibility in mind, i.e. used formatting options such as styles. If you'd like to find out more about creating accessible Word documents see our Toolkit resource on Accessibility for Authors/Creators or contact the Assistive Technology team: atech@abdn.ac.uk.

The Security tab

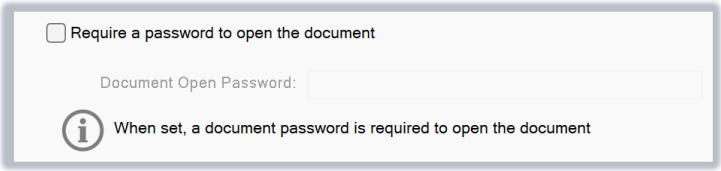
By default, Acrobat PDFMaker does not apply any security settings to your PDFs.

Use the **Security** tab to set permissions for opening, printing, copying, and editing your PDF.

This can be important for copyright reasons. For example, although you might be happy to share the PDF, you may not want people to be able to copy parts of it or change it in any way.

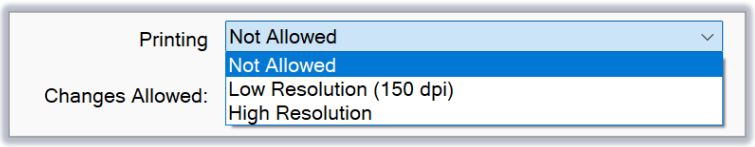


- **Require a Password to open the document:**
  When checked, this enables the **Document Open Password** text box. Here you can set a password that anyone trying to open the PDF will need to know. When you click **OK** at the foot of the dialog, you will be prompted to confirm the password you have set by retyping it.

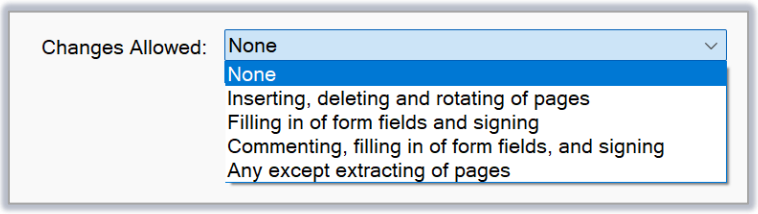


- **Restrict editing and printing of the document:**
  When checked, you can choose:
  - Whether users can **Print** the PDF and if so, at what quality.

    Note: If you select **High Resolution**, the file size of the resulting PDF will be higher than if you select **Low Resolution**.



  - Whether users can make changes to the PDF and if so, what type of changes they can make.



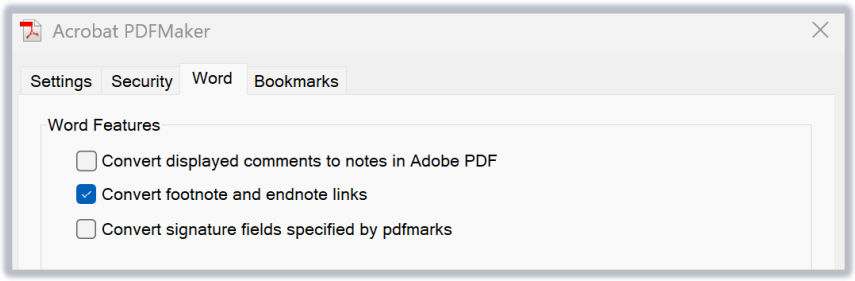
  - Whether users can copy content from the PDF by selecting **Enable copying of text, images, and other contents**.
  - Whether to Enable text access for screen reader devices for the visually impaired.
    Note: We recommend you leave this option checked.
  - Whether to allow search engines to read the PDF's metadata by selecting **Enable Plaintext Metadata**.

    Note: If you choose to restrict editing and printing, you will need to set a permissions password. Type this in the **Change Permissions Password** text box. When you click **OK** at the foot of the dialog, you will be prompted to confirm the password you have set by retyping it.

The Word tab

Use the options under the **Word** tab to set which Word features you want to integrate into the PDF.

The contents of this tab may vary depending on whether anyone reviewing your Word document has added comments. The screenshot below shows Acrobat PDFMaker's default settings. You can change these if you want.



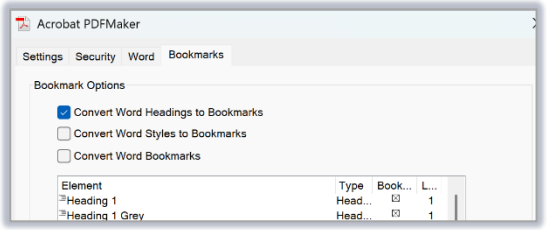
- **Convert displayed comments to notes in Adobe PDF:**
  If this is checked, Acrobat will convert any comments in the Word document into PDF comments.

  If there *are* comments in the Word document, and you check this option, the following options become available:

  - **Reviewer:** Lists reviewers who have added comments to the Word document.
  - **Include:** By default, this is checked. If you don't want to include the comments in the PDF, uncheck this option.
  - **Notes open:** By default, this is unchecked. If you want the reviewer's comments to open automatically in the PDF, check this option.
  - **Color:** This option indicates the colour used to highlight each reviewer's comments. Click the color icon repeatedly to cycle through the available colors.
  - **#of comments:** This shows the number of comments that a reviewer has made.
- **Convert footnote and endnote links:**
  If this is checked, all footnote and endnote links in the Word document are integrated into the PDF.

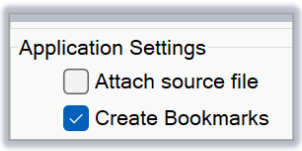
The Bookmarks tab

Bookmarks make it easier to navigate a PDF by allowing you to jump to set points within the document.



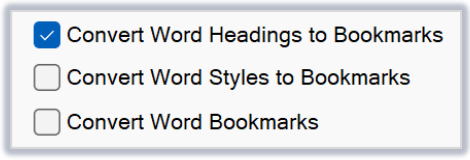
Use the options on the **Bookmarks** tab to convert Word elements such as Headings and Styles into PDF bookmarks. By default, only **Convert Word Headings to Bookmarks** is selected.

1. Before you start making changes, first click the **Settings** tab and tick **Create Bookmarks**.

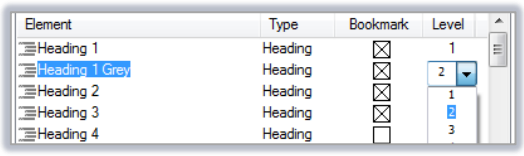


Note: If this is left unticked, bookmarks will not be created and any options you set on the Bookmarks tab will not take effect.

2. Click the **Bookmarks** tab.
3. Choose whether or not to convert Word Headings, Word Styles, and/or Word Bookmarks to PDF bookmarks by checking the appropriate boxes under **Bookmark Options**.



4. In the **Element** list, specify which Headings and Styles to convert by checking or unchecking the relevant boxes in the **Bookmark** column.
   - In the **Level** column, you can change the hierarchy of elements. Click on the level number to open a drop-down menu and change the value (1 to 9).



Saving Acrobat PDFMaker Preferences

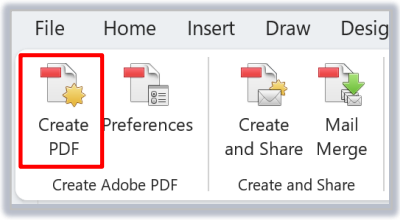
Once you have worked through all four tabs and chosen the preferences you need, remember to click **OK** and **Save** your document.

Remember that whatever preferences you set will become your **default** settings once saved, but you can return at any time to change them.

Creating the PDF

When you are ready to create a PDF, click **Create PDF** on the **Acrobat** tab.

Exactly what happens next will depend on the preferences you selected under the **Settings** tab – but in all cases, PDFMaker converts your Word document to PDF and saves the PDF.



Further information and help

If you have Adobe Acrobat DC installed on your PC but you don't see the Acrobat tab in Word, or have any further questions please use MyIT to report an issue to the IT Service Desk: https://myit.abdn.ac.uk.