

Effectively Using

Adobe Acrobat

MID-MO AGA

Membership Development

December 2, 2014

Presented by:



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Director of Governmental Audit Quality
Rehmann

Session Overview

- Version differences
- View options
- Annotations / mark-ups / signatures
- Hyperlinks / bookmarks
- OCR / scanned documents
- Pasting PDF data into Word / Excel
- Open Q&A

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Reader vs. Acrobat

Adobe Reader

- Free
- View, search, and print PDF files

Adobe Acrobat

- Paid application
- View, search, and print PDF files
- Create/edit PDFs
- Convert PDFs to other formats
- Merge files into PDF
- Create PDF forms
- Sign/protect PDFs

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Acrobat Versions

- Support for Version 9 expired in 2013
- Version X *(what I'm demonstrating today)* introduced a new toolbar and menu
- Version XI is the current version
- The different versions have the same basic feature set, but the toolbars and menus have been changed
- The "Pro" versions add advanced features

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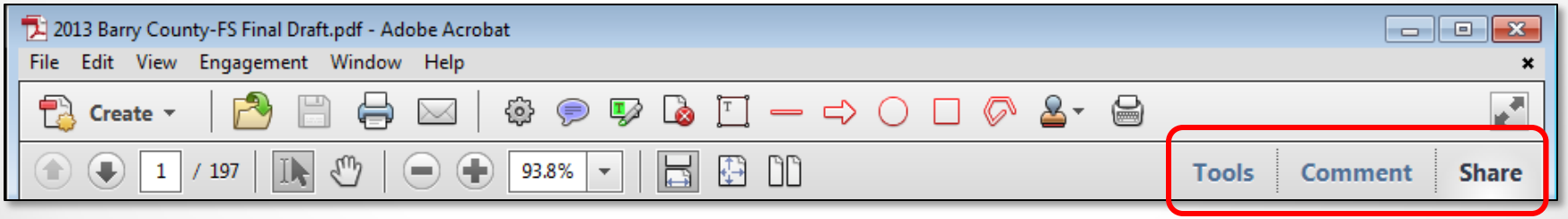
Acrobat 9 vs. X

- New menu/ribbon layout

Acrobat 9



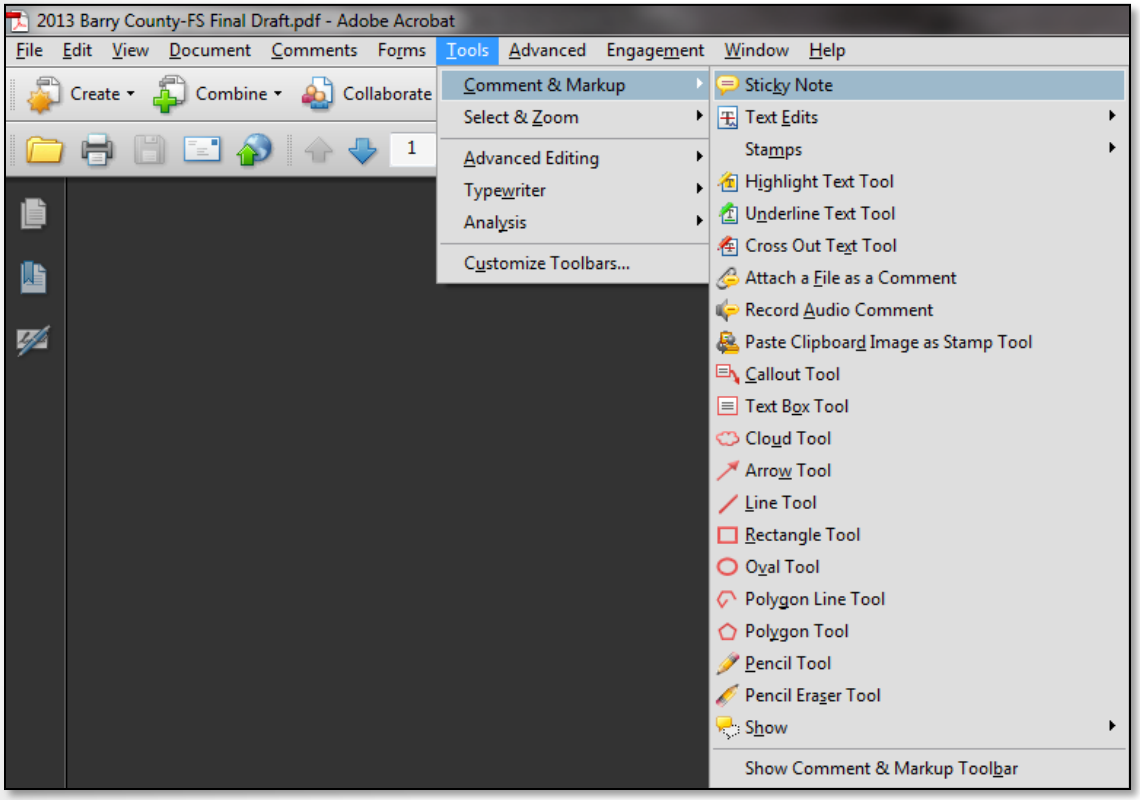
Acrobat X



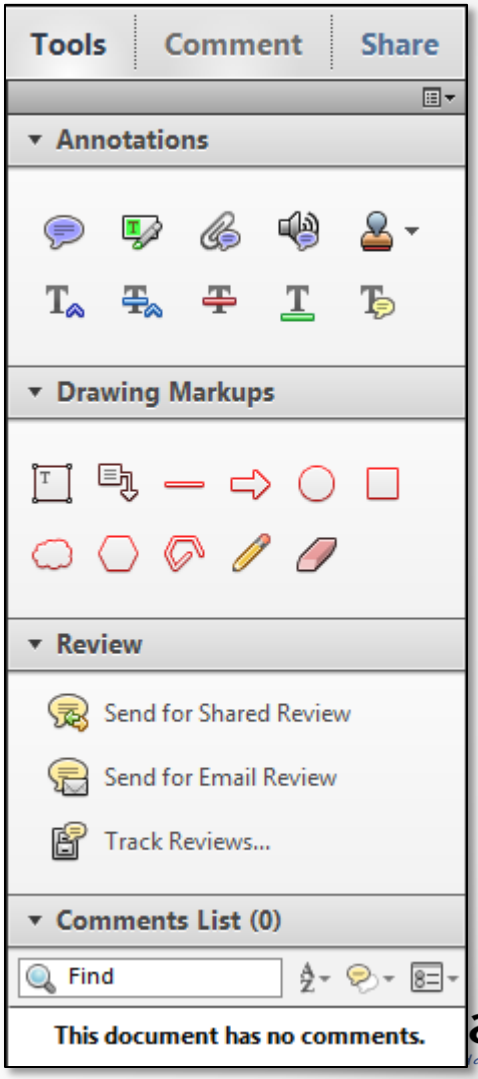
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Acrobat 9 vs. X

Acrobat 9

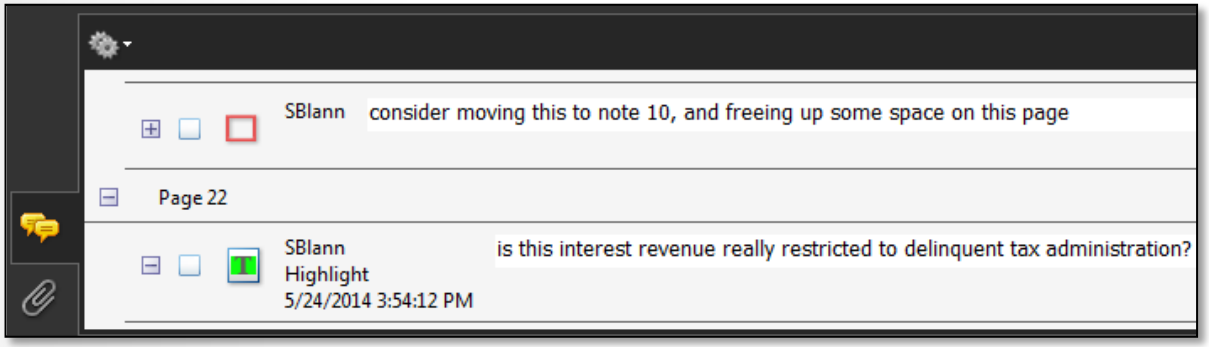


Acrobat X

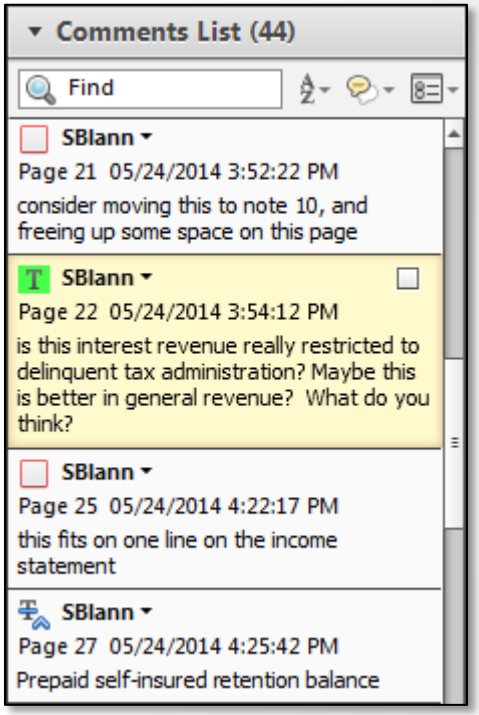


Acrobat 9 vs. X

Acrobat 9



Acrobat X



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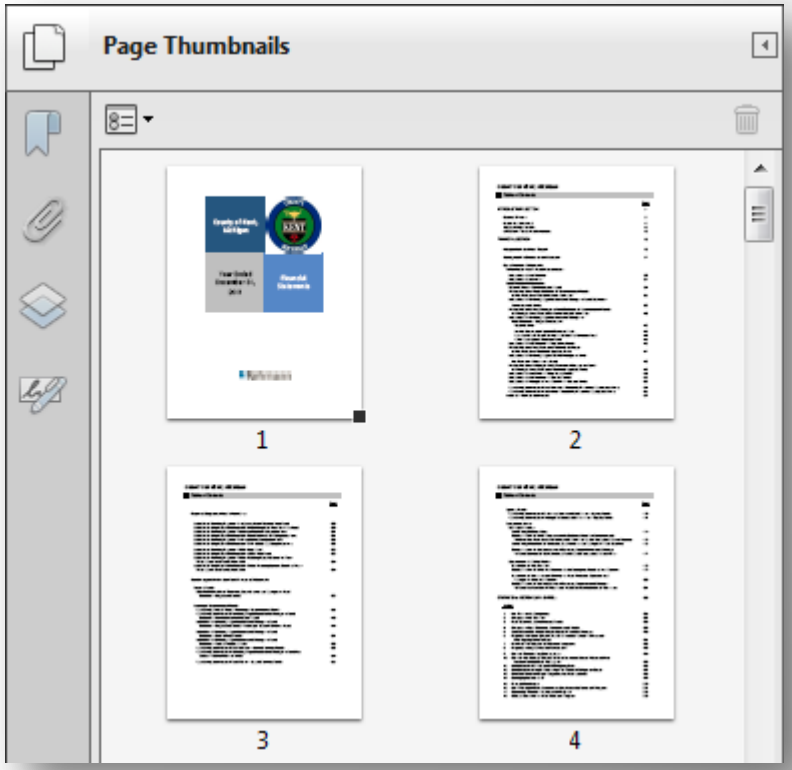
Create a PDF

- Print using the Adobe print driver
- Save as PDF (Excel, Word, PowerPoint)
- Use Adobe plug-ins
  - Within applications
  - From an Explorer window

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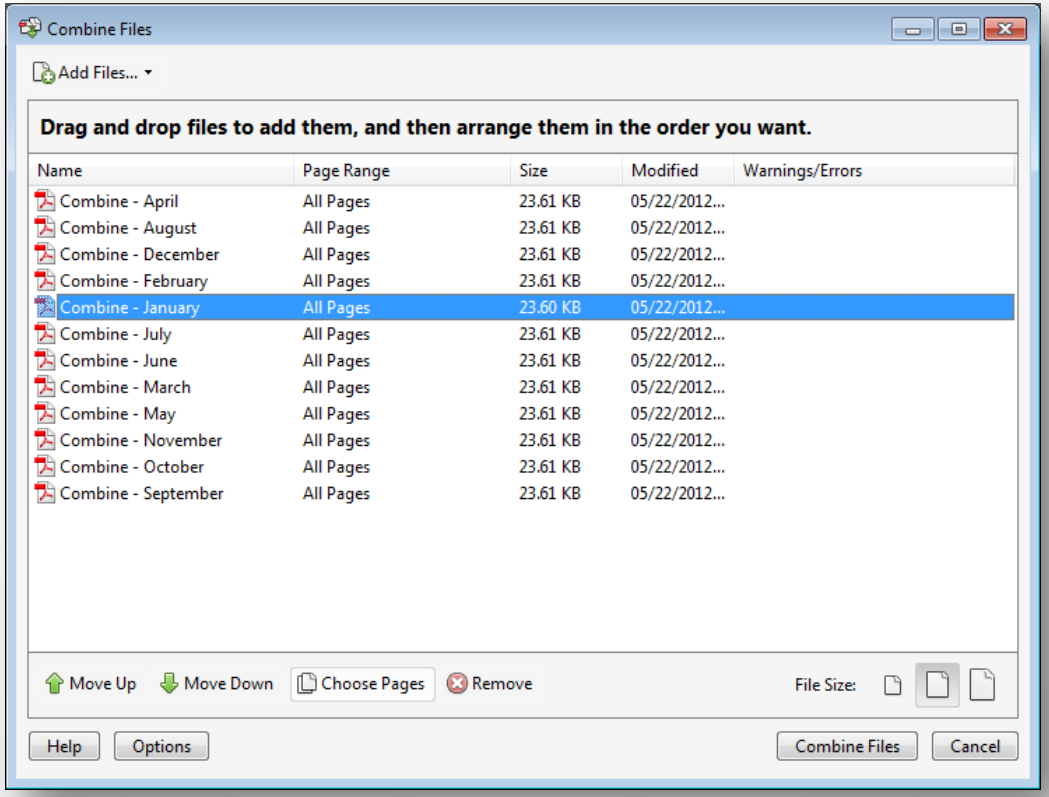
Insert / Re-order Pages

- Use the Page Thumbnails view to see multiple pages at a time
- Drag and drop:
  - Re-order pages
  - Insert pages
  - Insert whole files



Combine Files

- Combine multiple files into a single PDF (from the create button)

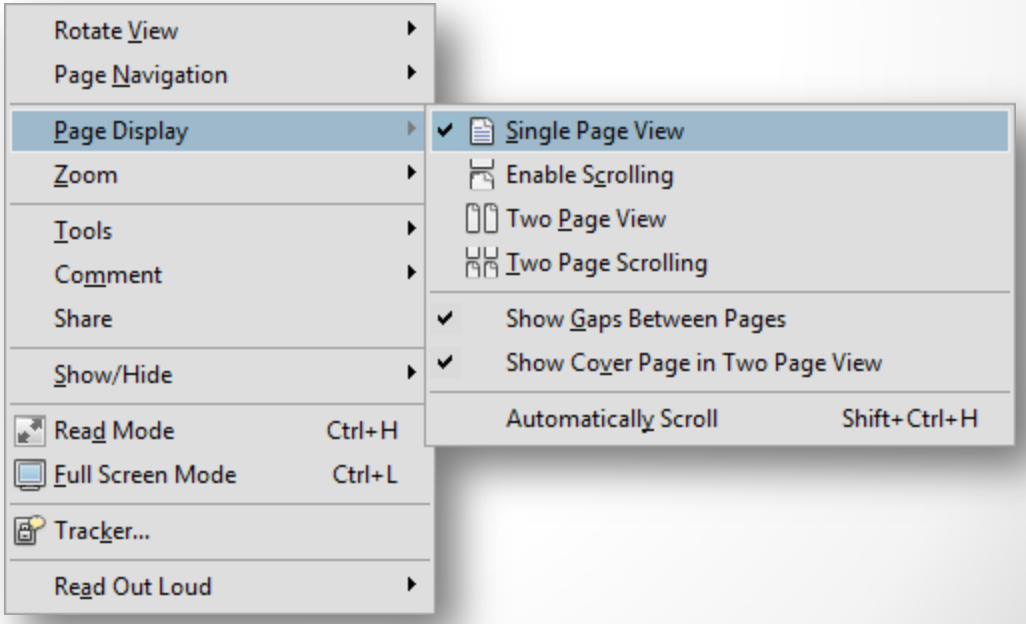


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View Settings

- Fit Page vs. Fit Width
- Single vs. Two Page
- Scrolling (on/off)
- Read Mode
- Full Screen

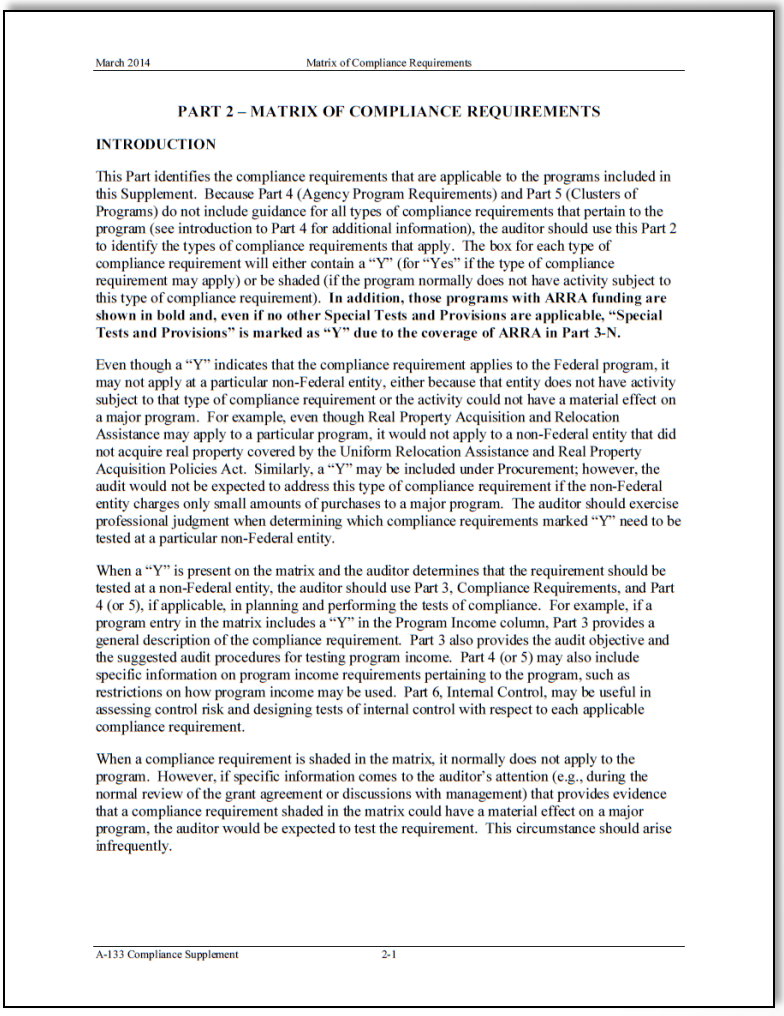




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Rotating Pages

- Rotating pages vs. rotating views



March 2014 Matrix of Compliance Requirements

PART 2 – MATRIX OF COMPLIANCE REQUIREMENTS

INTRODUCTION

This Part identifies the compliance requirements that are applicable to the programs included in this Supplement. Because Part 4 (Agency Program Requirements) and Part 5 (Clusters of Programs) do not include guidance for all types of compliance requirements that pertain to the program (see introduction to Part 4 for additional information), the auditor should use this Part 2 to identify the types of compliance requirements that apply. The box for each type of compliance requirement will either contain a "Y" (for "Yes" if the type of compliance requirement may apply) or be shaded (if the program normally does not have activity subject to this type of compliance requirement). **In addition, those programs with ARRA funding are shown in bold and, even if no other Special Tests and Provisions are applicable, "Special Tests and Provisions" is marked as "Y" due to the coverage of ARRA in Part 3-N.**

Even though a "Y" indicates that the compliance requirement applies to the Federal program, it may not apply at a particular non-Federal entity, either because that entity does not have activity subject to that type of compliance requirement or the activity could not have a material effect on a major program. For example, even though Real Property Acquisition and Relocation Assistance may apply to a particular program, it would not apply to a non-Federal entity that did not acquire real property covered by the Uniform Relocation Assistance and Real Property Acquisition Policies Act. Similarly, a "Y" may be included under Procurement; however, the audit would not be expected to address this type of compliance requirement if the non-Federal entity charges only small amounts of purchases to a major program. The auditor should exercise professional judgment when determining which compliance requirements marked "Y" need to be tested at a particular non-Federal entity.

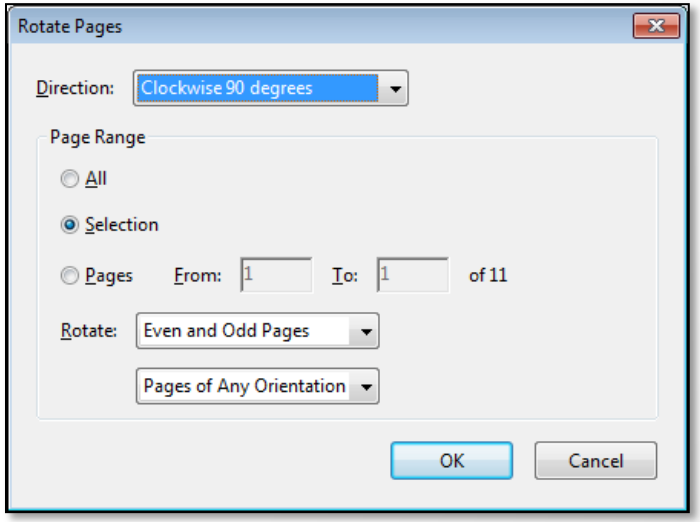
When a "Y" is present on the matrix and the auditor determines that the requirement should be tested at a non-Federal entity, the auditor should use Part 3, Compliance Requirements, and Part 4 (or 5), if applicable, in planning and performing the tests of compliance. For example, if a program entry in the matrix includes a "Y" in the Program Income column, Part 3 provides a general description of the compliance requirement. Part 3 also provides the audit objective and the suggested audit procedures for testing program income. Part 4 (or 5) may also include specific information on program income requirements pertaining to the program, such as restrictions on how program income may be used. Part 6, Internal Control, may be useful in assessing control risk and designing tests of internal control with respect to each applicable compliance requirement.

When a compliance requirement is shaded in the matrix, it normally does not apply to the program. However, if specific information comes to the auditor's attention (e.g., during the normal review of the grant agreement or discussions with management) that provides evidence that a compliance requirement shaded in the matrix could have a material effect on a major program, the auditor would be expected to test the requirement. This circumstance should arise infrequently.

A-133 Compliance Supplement 2-1

Rotating Pages

- Rotating pages vs. rotating views
  - Rotating views only changes the on-screen display
    - Doesn't save the setting for other users
  - Rotating pages actually changes the PDF
    - Saves for all users
    - CTRL+SHIFT+R or
      right-click on thumbnail



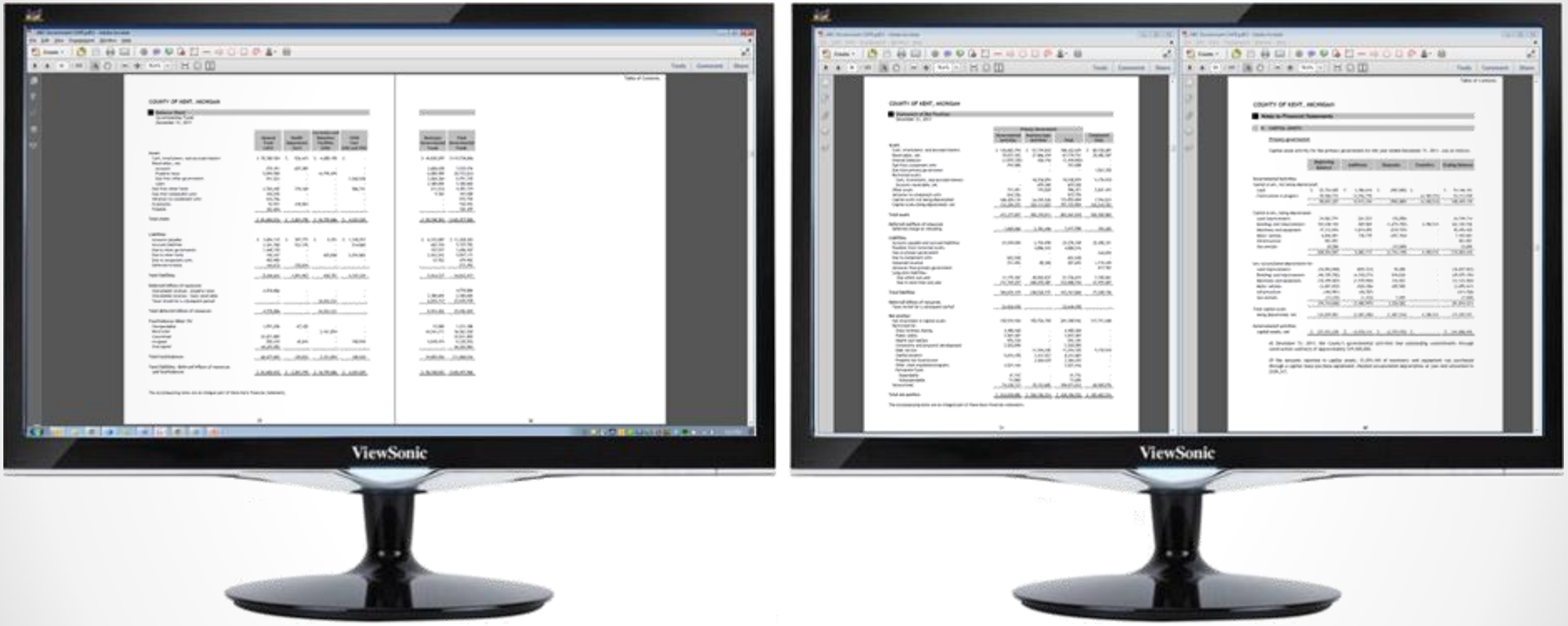
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Using Multiple Monitors

- Open additional copies of the same file
  - Window | New Window
- Switch between copies of the same file
  - ALT+TAB
- Rearrange windows
  - Drag the title bar to the top or side of any screen
  - Use the Windows key  + arrow keys

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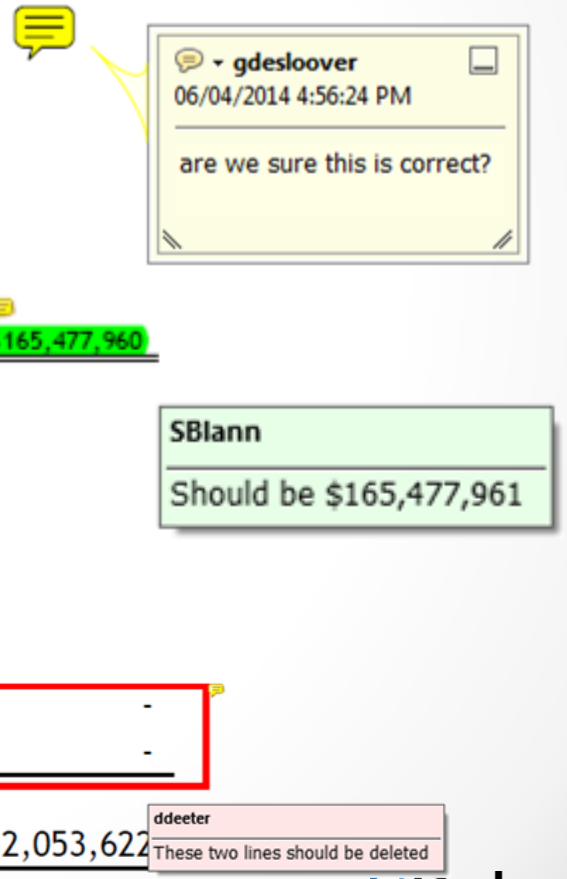
Using Multiple Monitors



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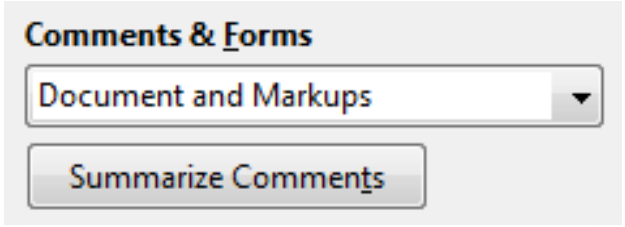
Annotations / Mark-ups

- There are many ways to leave comments in a PDF
  - Sticky notes
  - Highlight text
  - Strike-out or replace text
  - Arrows
  - Boxes



Annotations / Mark-ups

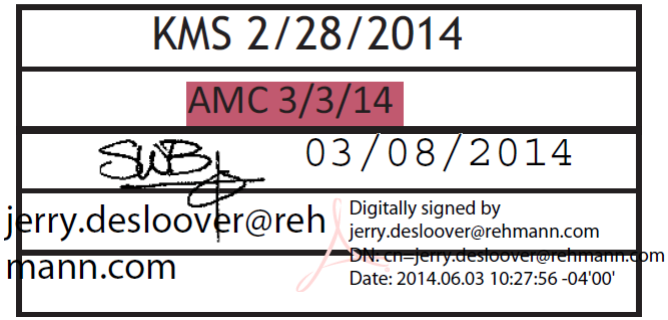
- The best way to review comments is on screen
  - See who left each comment, without missing any
- When printing, select Document and Markups to include graphics
  - To print a list of comments with page numbers, select “summarize comments” on the print menu



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Electronic Signatures

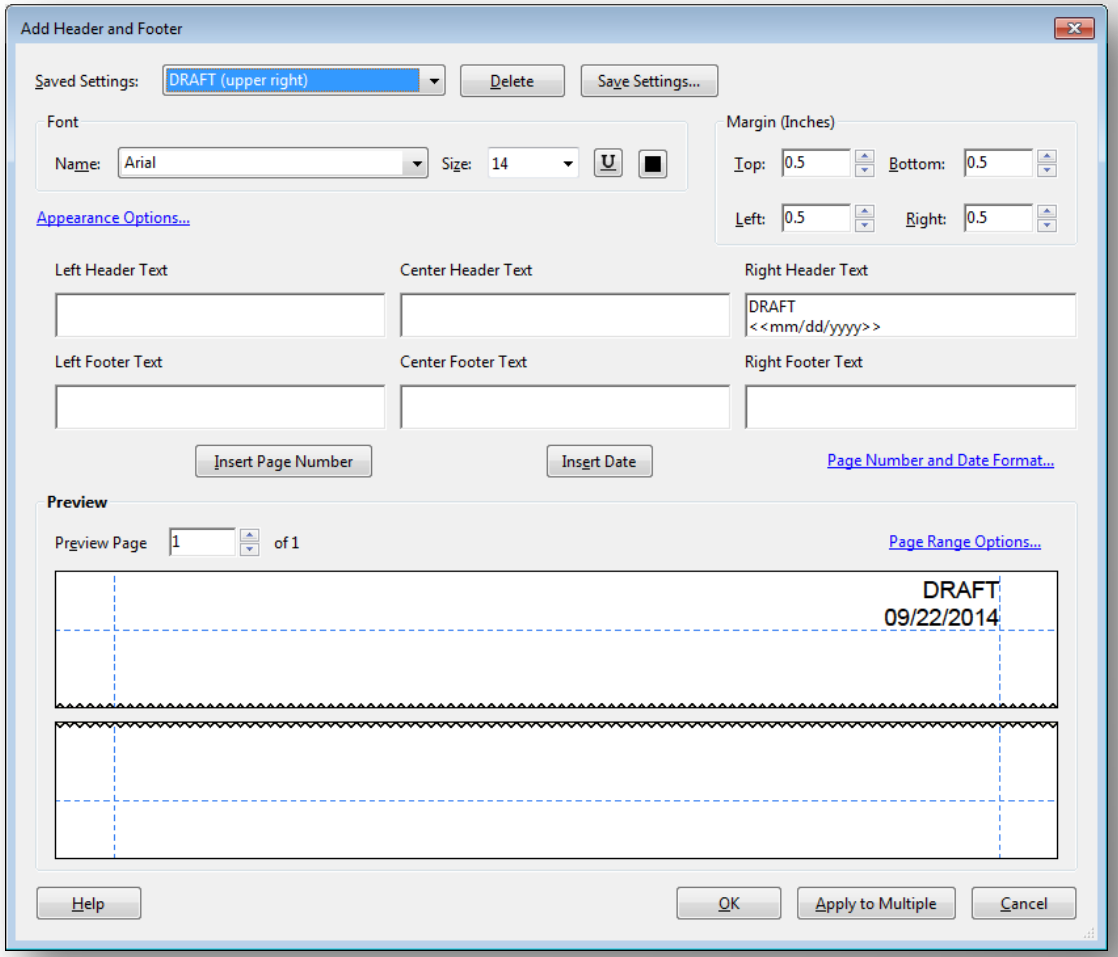
- 3 primary ways to “sign” a PDF
  - Type your name/initials with the typewriter
  - Use a stamp with your name/initials
  - Apply a digital signature



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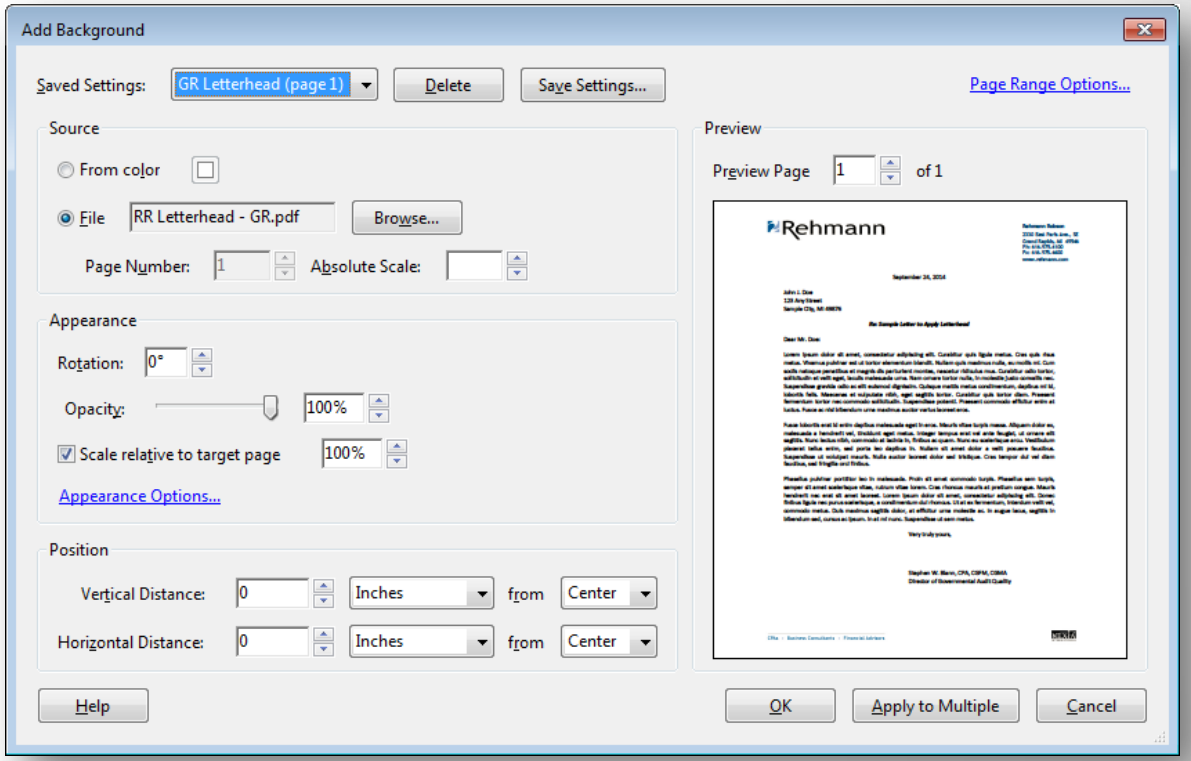
Headers/Footers

- Apply page numbers
- Denote draft versions and dates



Backgrounds

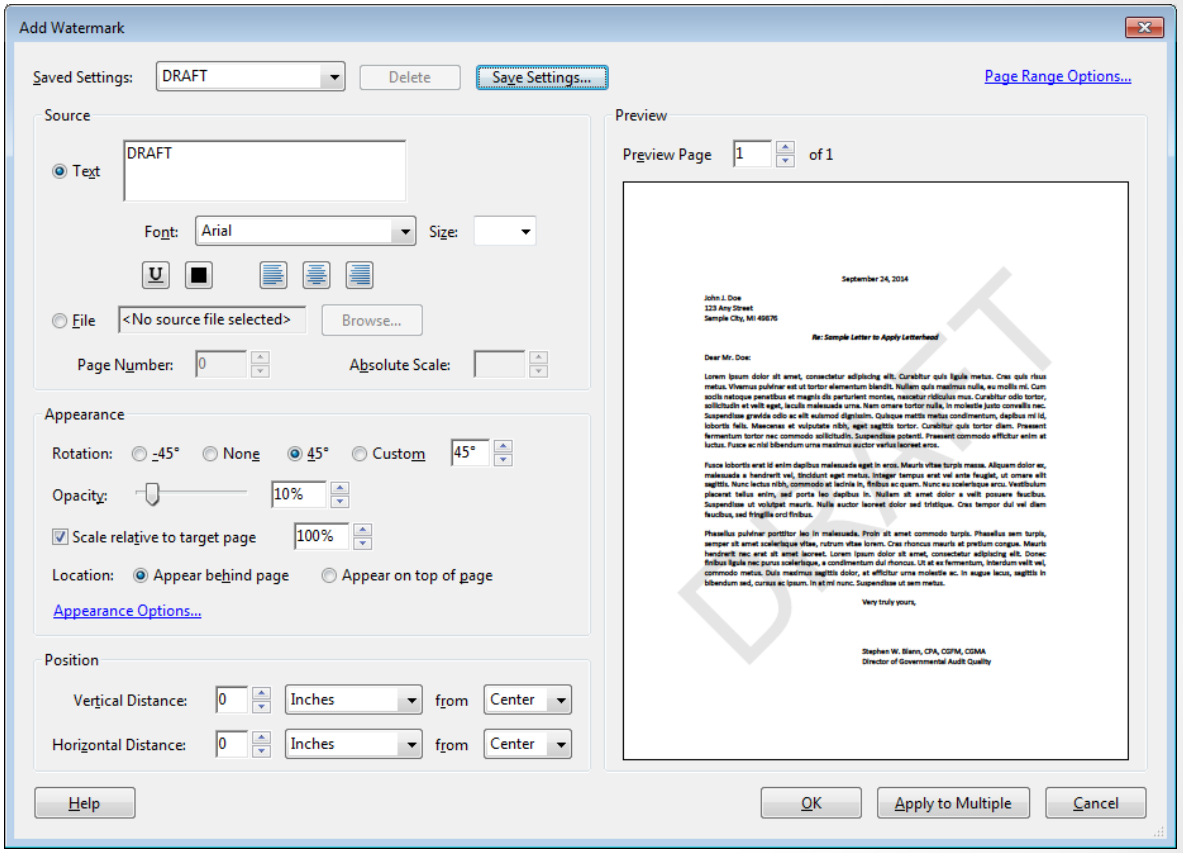
- Save and apply letterhead



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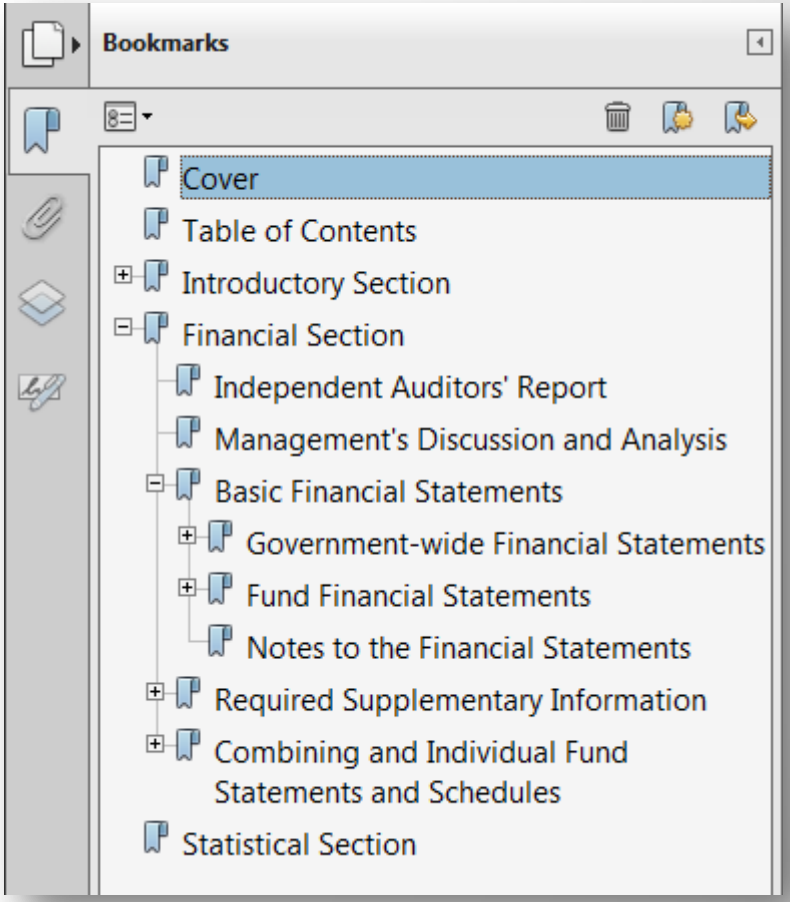
Watermarks

- Stamp pages as DRAFT



Bookmarks / Hyperlinks

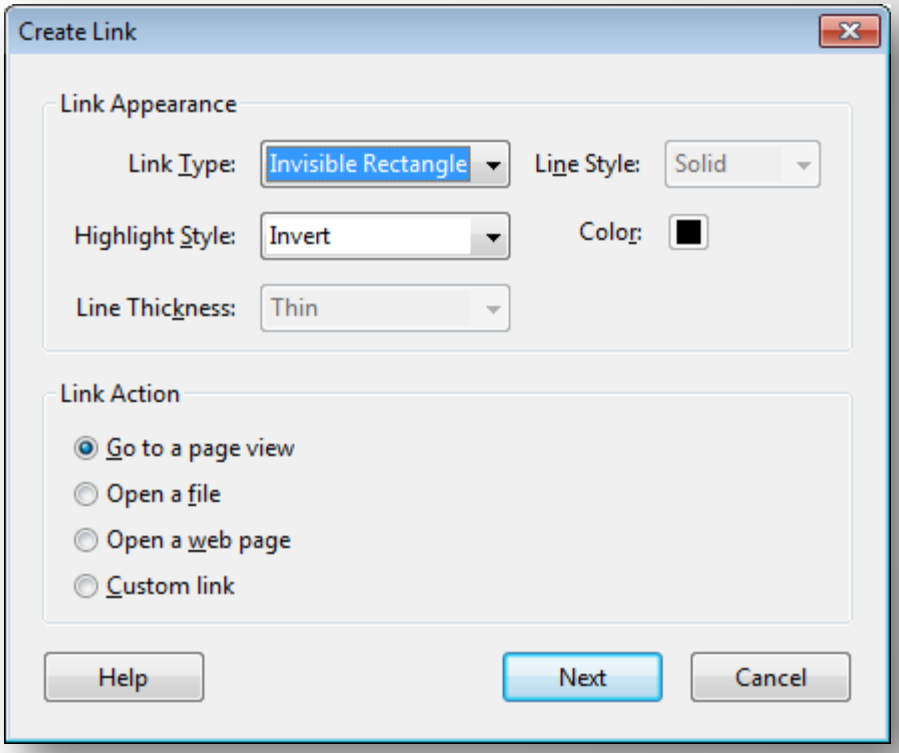
- Bookmarks allow organized navigation through large files
  - Navigate to the desired view
  - Select New Bookmark
  - Name, drag, and drop into the desired location in the tree



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Bookmarks / Hyperlinks

- Hyperlinks allow users to click within a PDF to jump to a location
  - Select the link tool
  - Draw the selection area, and set its appearance
  - Navigate to the destination and save

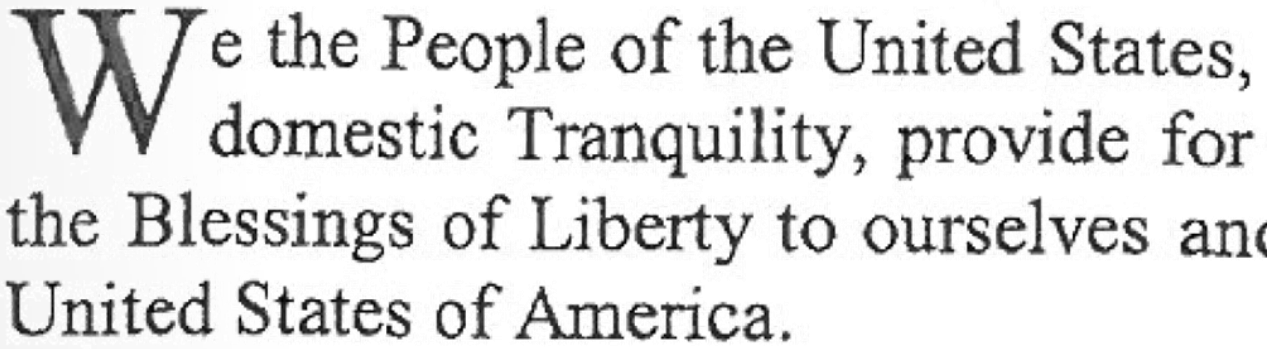


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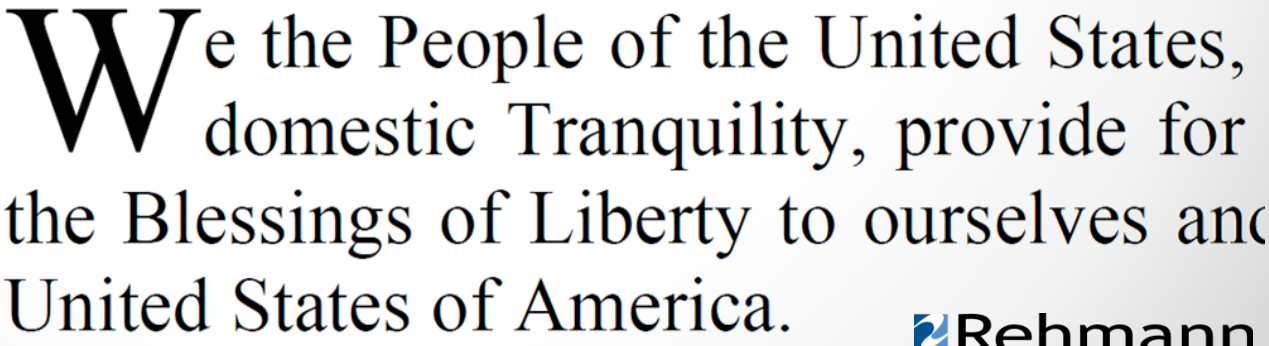
OCR/Scanned Documents

- Clean (print to PDF) files are always better than scanned files

Scanned



Print to PDF



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OCR/Scanned Documents

- Scans can be optimized and made readable using Optical Character Recognition
  - Document | OCR Text Recognition (Acrobat 9)
  - Tools | Recognize Text (Acrobat X)
- Also fixes some page skewing issues
- OCR is not perfect, so be careful relying on it for text searches

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PDF to Word / Excel

- Highlight, copy, and paste text
  - Works for “clean” (print to PDF) and OCR files
- PDF tables
  - Right-click and “copy as table” (Acrobat 9) or “copy with formatting” (Acrobat X)
- Snapshot tool
  - Copy sections or whole pages into the clipboard
    - Tools | Select & Zoom | Snapshot (Acrobat 9)
    - Edit | Take a Snapshot (Acrobat X)



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Open Q&A

- How do I…?
- Why can't I…?
- Can you show me how to…?
- Is there any way to…?



For more information...



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