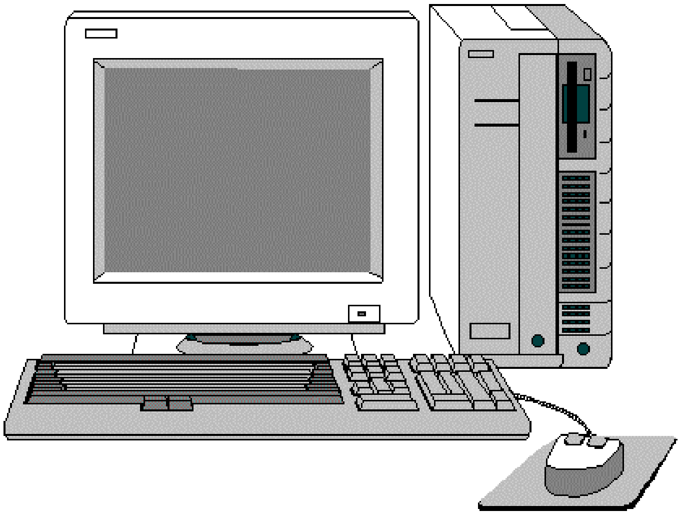

Center for Drug Evaluation and Research

Rockville, Maryland 20857

Presents…

Creating PDF Review Documents

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Introduction

In keeping with CDER's Electronic Regulatory Submission and Review (ERSR) goals, review documents are stored electronically in the Division Files System (DFS). The documents checked into the DFS repository are in final format. The format used in the center for a final document is Portable Document Format (PDF).

PDF files are "electronic paper" documents that contain and preserve all fonts, graphics, and links from their source documents, such as documents created using Microsoft Word. Creating a PDF file from a Word document is similar to printing to a hard copy laser or inkjet printer. The same care needs to be given when creating PDF files as you need to follow when sending documents to a printer. Print drivers, page setup, errant page breaks, and other document settings have to be adjusted and checked in the final document, whether it's paper or PDF.

Creating PDF Review Documents instructs users how to create a Portable Document Format (PDF) version of a review document that maintains the formatting of the original MS Word document. Instruction is included in using the proper font, paragraph, page, and section formatting needed prior to converting an MS Word review document to the PDF archiving standard used in the Division Files System (DFS). Adobe Acrobat 4.0 is then used to convert the document to PDF and then open, view, and enhance the PDF review document. The procedures covered in this course are essential to those who create review documents, documents to be archived, or have a general need to create PDF documents. This class is the most recent in the OIT Electronic Regulatory Submission and Review (ERSR) training program.

Prerequisites

Before beginning these chapters you should have a working knowledge of Windows 95 and Microsoft Word 97 and their conventions. In particular, you should know how to do the following:

- Use a mouse and standard Windows menus and commands.
- Open, save, and close files.
- Resize and position application and document windows on the screen.
- Attended the **Introduction to Microsoft Word 97** and **Formatting in Microsoft Word 97** classes offered by OIT or have an understanding of their concepts

For help with any of these techniques, please see your Windows 95 documentation or the CDER OIT Help Desk. Classes in Windows 95 are also offered by OIT.

Conventions

Variables and commands are in the `courier new` font.

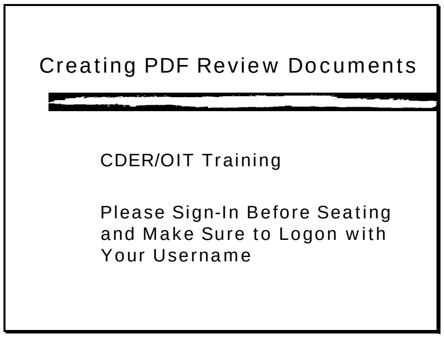
☞ Classroom exercises will be marked with a hand bullet.

Chapter 1 –Presentation

Please use the blank lines to take notes during the presentation.

This chapter will take approximately 15 minutes to complete.

Slide 1

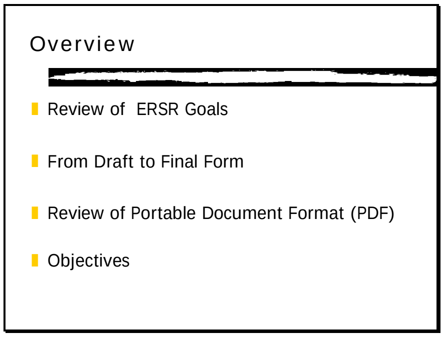


Creating PDF Review Documents

CDER/OIT Training

Please Sign-In Before Seating
and Make Sure to Logon with
Your Username

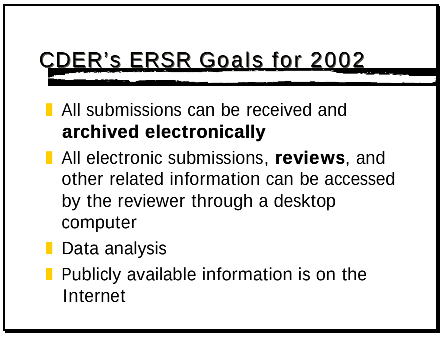
Slide 2



Overview

- Review of ERSR Goals
- From Draft to Final Form
- Review of Portable Document Format (PDF)
- Objectives

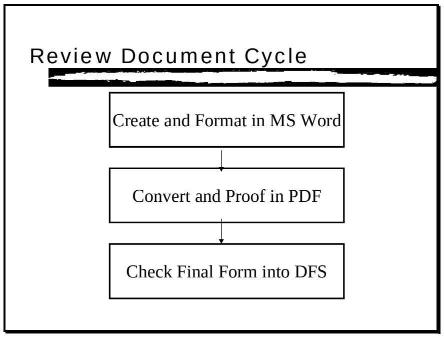
Slide 3



CDER's ERSR Goals for 2002

- All submissions can be received and **archived electronically**
- All electronic submissions, **reviews**, and other related information can be accessed by the reviewer through a desktop computer
- Data analysis
- Publicly available information is on the Internet

Slide 4



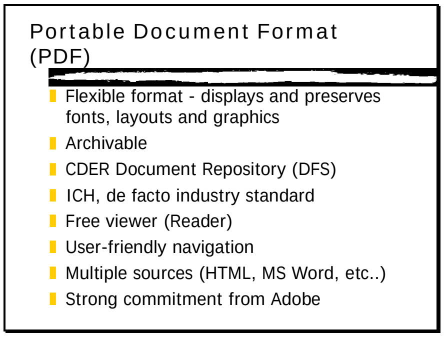
Review Document Cycle

Create and Format in MS Word

Convert and Proof in PDF

Check Final Form into DFS

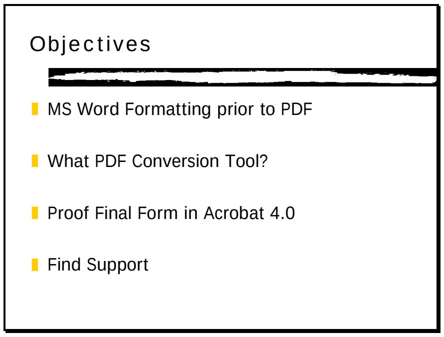
Slide 5



Portable Document Format (PDF)

- Flexible format - displays and preserves fonts, layouts and graphics
- Archivable
- CDER Document Repository (DFS)
- ICH, de facto industry standard
- Free viewer (Reader)
- User-friendly navigation
- Multiple sources (HTML, MS Word, etc..)
- Strong commitment from Adobe

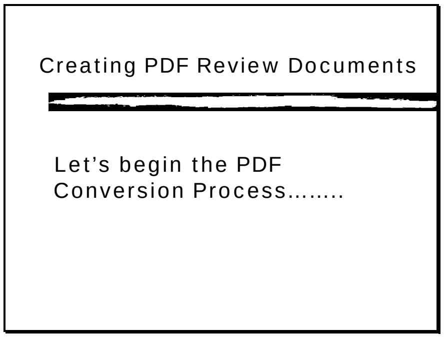
Slide 6



Objectives

- MS Word Formatting prior to PDF
- What PDF Conversion Tool?
- Proof Final Form in Acrobat 4.0
- Find Support

Slide 7



Creating PDF Review Documents

Let’s begin the PDF Conversion Process........

Chapter 2 – Formatting Review Documents

Before documents are converted to Portable Document Format (PDF), proper formatting of the document needs to take place to ensure that there are no extra spaces, paragraph marks, or spelling and grammar errors. Also, before the document is put in final PDF form, all page and section breaks, page numbers, and headings need to be inserted so they will carry over to the final archived document.

Microsoft Word 97 font, style, header and footer, and page formatting tools are used to complete the tasks in this chapter.

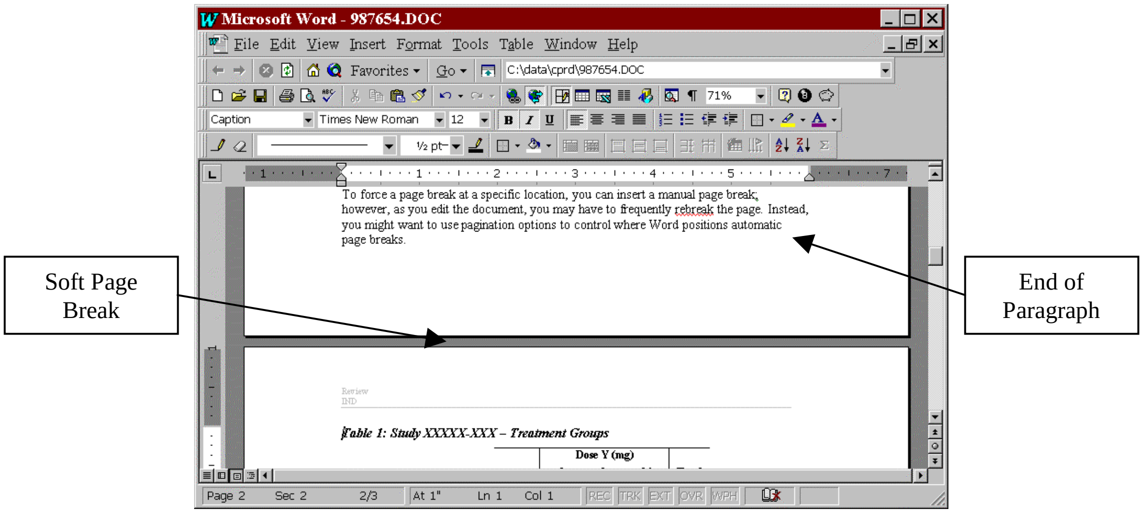
This chapter will take about 90 minutes to complete.

From Draft to Final Form

Once you complete the content of a review document, it is time to make the final formatting changes to the appearance of the document. After you have written several review documents, you may become accustomed to your own formatting style. You apply your style, or the style that is used in you particular discipline, and prepare your document for printing. After you send the document to the network printer, you proof the document for errors. Sometimes you have to hit `[ENTER]` a few times to make the page break or you may have forgotten to add page numbers. Either way you make the changes then print the document again and repeat the proofing process.

Converting documents to PDF is the same process. Many of the same proofing errors that you may find when converting your word processing document to print you will also find in PDF. Advantages of PDF are the ability to find errors quickly and the reduction of paper. Proofing print documents can be a paper intensive process.

Let's examine some common errors that may occur when taking documents to final form, print or PDF. Below is a screen shot of a Word review document just before conversion to final form:


Microsoft Word - 987654.DOC
File Edit View Insert Format Tools Table Window Help
Favorites
Go
C:\data\cprd\987654.DOC
71%
Caption
Times New Roman
12
½ pt
Soft Page Break
End of Paragraph
Review
IND
Page 2 Sec 2 2/3 At 1" Ln 1 Col 1 REC TRK EXT OVR WPH

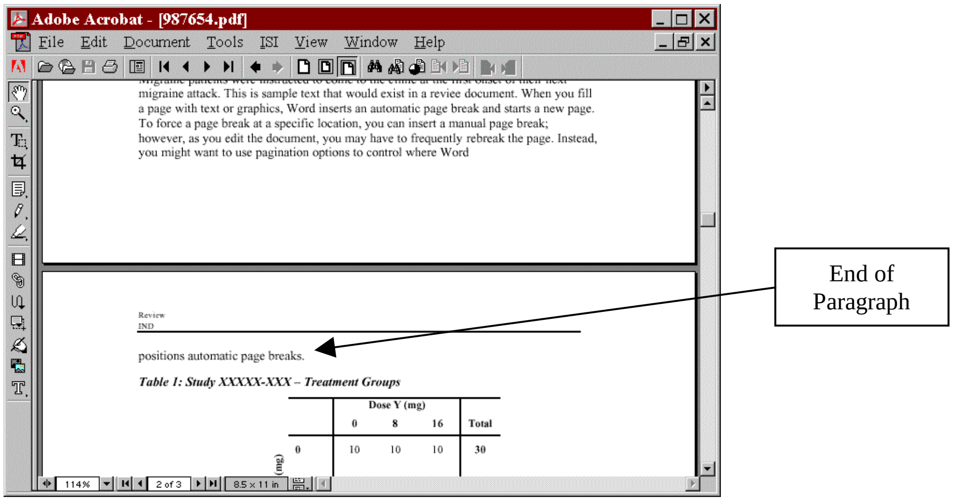
To force a page break at a specific location, you can insert a manual page break, however, as you edit the document, you may have to frequently rebreak the page. Instead, you might want to use pagination options to control where Word positions automatic page breaks.

Table 1: Study XXXXX-XXX – Treatment Groups

Dose Y (mg)

In the above example, the end of the paragraph corresponds with the end of the page. The break in the page occurred when the author hit `[ENTER]` at the end of the paragraph. When a page breaks occurs when the end of page mark is encountered is called a **soft page break**. The author wants the table heading at the top of the next page to stay in its current position because it describes the table directly beneath it.

The illustration at the top of the next page is an example of the review after it has been converted to final form. The author is viewing the document in Adobe Acrobat 4.0.



Adobe Acrobat - [987654.pdf]
File Edit Document Tools ISI View Window Help
114%
2 of 3
8.5 x 11 in
(mg)

migraine attack. This is sample text that would exist in a reviee document. When you fill a page with text or graphics, Word inserts an automatic page break and starts a new page. To force a page break at a specific location, you can insert a manual page break; however, as you edit the document, you may have to frequently rebreak the page. Instead, you might want to use pagination options to control where Word

Review
IND

positions automatic page breaks.

Table 1: Study XXXXX-XXX – Treatment Groups

	Dose Y (mg)			
	0	**8**	**16**	**Total**
0	10	10	10	30

End of Paragraph

As you can see in the above example, the paragraph is now split between the bottom of the first page on the screen and the top of the next. This is an example of what can happen when a soft page break divides two pages. If the author inserted a hard page break, the pages would still be divided when the document is converted to final form. We'll look later at examples of hard page breaks.

This example illustrates the need not only to use proper formatting when creating review documents, but also that proofing of the final form is still needed. Now we can just delete this PDF draft and try the process again. This time, let's start from the beginning and go through the document formatting tools when step at a time.

Printer Drivers

Before we move onto this topic, let's open a sample review document:

☞ Launch Word

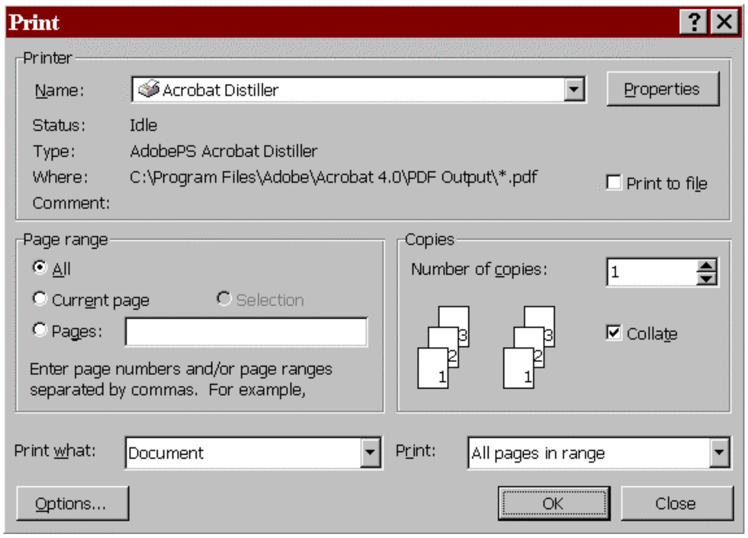
On the pulldown menu, go to `File|Open` and open the file `C:\Data\Classes\Cdfas\987654.doc`

The printer that is currently in use with your MS Word document will decide character and line spacing, page setups, etc. Because of the distinct differences of how printers communicate with Word, it is recommended that you always have the Acrobat Postscript driver selected when working on documents that you are formatting for conversion to final PDF form.

To change to the Adobe PostScript driver:

☞ On the menu bar, go to `File|Print`

☞ In the `Name:` field, select `Acrobat Distiller` (You may notice a slight shift in the document's appearance)



Name: Acrobat Distiller
Status: Idle
Type: AdobePS Acrobat Distiller
Where: C:\Program Files\Adobe\Acrobat 4.0\PDF Output*.pdf
Comment:
☐ Print to file
● All
○ Current page
○ Selection
○ Pages:
Enter page numbers and/or page ranges separated by commas. For example,
Number of copies: 1
☑ Collate
Print what: Document
Print: All pages in range

☞ DO NOT PRINT THIS DOCUMENT. Click the `Close` button

You may notice that the `Where:` section of the print window showed a destination folder for all documents created using Acrobat Distiller. The next lesson will discuss changing the default PDF output folder.

For more information on Adobe PostScript drivers, please consult the Adobe Acrobat Guide.

Show/Hide

The first formatting tool discussed is the show/hide tool. For the purposes of this training course, let’s assume that we have already checked this review document for content. This document still has not been checked for extra spaces, tab marks, paragraph marks or other non-printable characters.

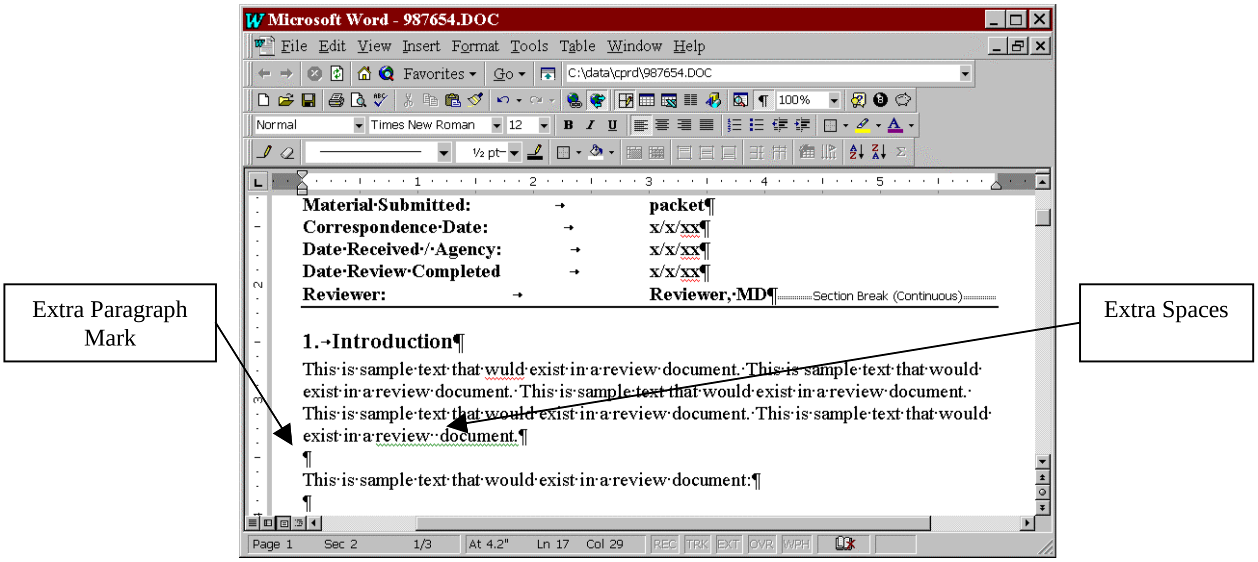
These non-printing characters can add spaces and lines to your document that you may not see during inspection of the final form. An advantage of using a word processor such as Microsoft Word is the ability to display formatting features that you may not see with the naked eye.

The Word **Show/Hide** feature on the standard toolbar will allow you to display all non-printing tab characters, spaces, paragraph marks, optional hyphens, and non printing text. Use this tool to view extra spaces, lines, or characters that you may wish to remove from your document.

☞ On the standard toolbar, click the Show/Hide button, ¶

When you press this button, Word displays all of the non-printing characters on the screen. These characters will not appear in your print or PDF final form document, but are used for proofing. Look through the beginning of the document for any additional non-printing characters that need to be removed from the document.

☞ Delete the extra spaces (•) and paragraph marks (¶) from the file.


Microsoft Word - 987654.DOC
File Edit View Insert Format Tools Table Window Help
Favorites
Go
C:\data\cprd\987654.DOC
100%
Normal
Times New Roman
12
½ pt
Page 1 Sec 2 1/3 At 4.2" Ln 17 Col 29 REC TRK EXT OVR WPH
Extra Paragraph Mark
Extra Spaces

Material·Submitted: → packet¶
Correspondence·Date: → x/x/xx¶
Date·Received·/·Agency: → x/x/xx¶
Date·Review·Completed → x/x/xx¶
Reviewer: → Reviewer,·MD¶ Section Break (Continuous)

1.→Introduction¶

This·is·sample·text·that·wuld·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review··document.¶
¶
This·is·sample·text·that·would·exist·in·a·review·document:¶
¶

The table below shows the action that creates each corresponding paragraph mark.

Action	Mark
[TAB]	→
[SPACE]	•
[ENTER]	¶
[CTRL] + [-]	¬
Hidden Text	Sample Text

You can change your Word settings so certain non-printing characters are always displayed. This feature is found under `Tools` | `Options` | `View` on the Word menu bar. For more information on non-printing characters, see the Word help menu.

☞ On the standard toolbar, click the Show/Hide button, ¶, to turn it off

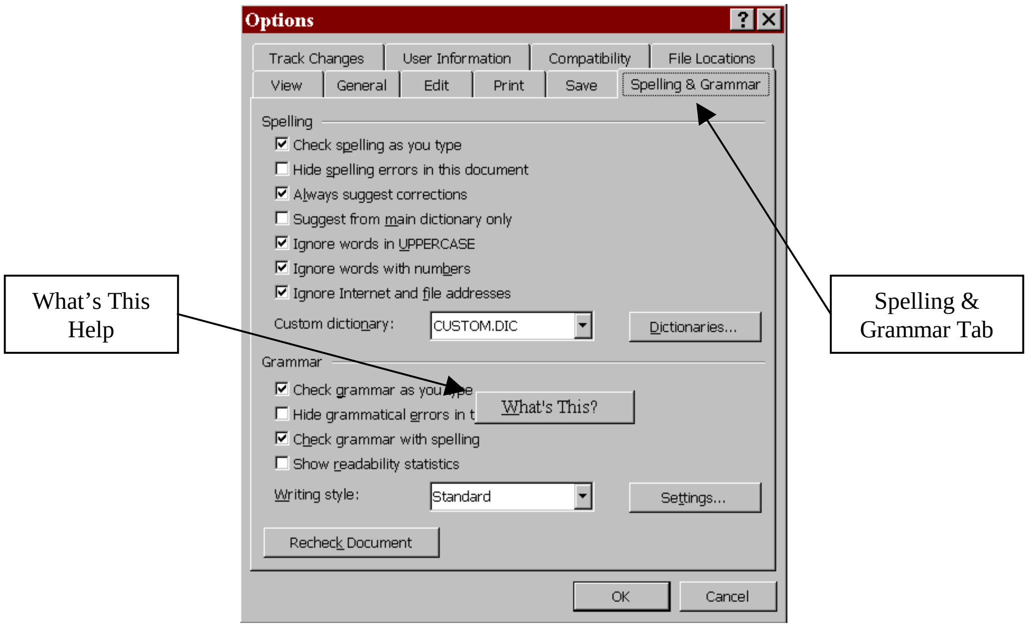
Spelling and Grammar Check

Now that you've removed any unwanted non-printing characters, let's spellcheck the document for spelling and grammar errors. While most users are familiar with the Spelling and Grammar button, ✓, they may not be familiar with how to setup this tool. You may see red or green underlined characters as you work on your document, but what is the purpose of these tools and how do you setup Word spelling and grammar settings?

You can setup Word to highlight possible spelling errors with red wavy lines as you type and possible grammar errors with green wavy lines. You can also set Word to only spell check the document and turn off the grammar check. In addition, if you do not want Word to spell check certain types of words, such as words in ALL CAPS, you can turn on and off these settings as well.

To setup spelling and grammar:

- On the menu bar, go to `Tools` | `Options` and click the `Spelling & Grammar` tab
- Make sure the `Check Grammar As you Type` box is checked
- Click `OK`


Options
?
Track Changes
User Information
Compatibility
File Locations
View
General
Edit
Print
Save
Spelling & Grammar
What's This?
Dictionaries...
Settings...
Recheck Document
OK
Cancel
What's This Help
Spelling & Grammar Tab

Spelling
☑ Check spelling as you type
☐ Hide spelling errors in this document
☑ Always suggest corrections
☐ Suggest from main dictionary only
☑ Ignore words in UPPERCASE
☑ Ignore words with numbers
☑ Ignore Internet and file addresses
Custom dictionary: CUSTOM.DIC

Grammar
☑ Check grammar as you type
☐ Hide grammatical errors in t
☑ Check grammar with spelling
☐ Show readability statistics
Writing style: Standard

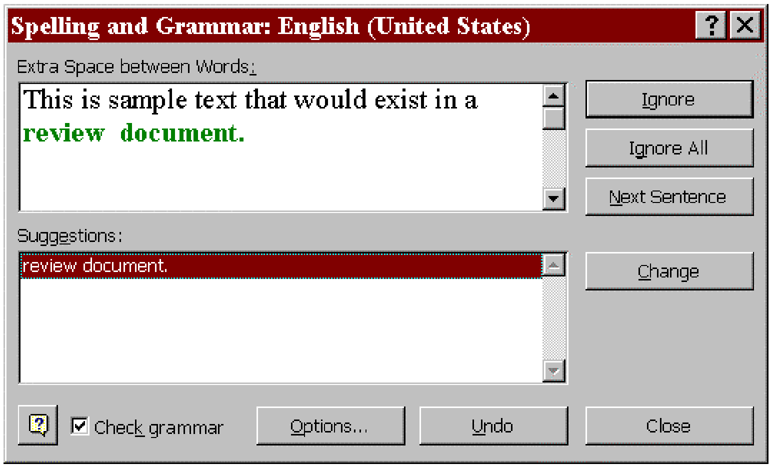
Note: If you are unfamiliar with any feature, right click on the feature and click on **`What's This`*****.***

Now that you have the spelling and grammar check setup, you can run a check on your review document.

- Click the Spelling and Grammar button, ✓

If the tool finds a possible grammatical error, that text or phrase will appear in the spell check window and appear green. Depending on the error, you have several options.

1. Ignore the possible error (Word is not always accurate, use your best judgement)
2. Ignore every instance of this error during this check
3. Move to the next sentence
4. Select one of Word's suggestions and change
5. Click in the window and make your own changes



Spelling and Grammar: English (United States)

Extra Space between Words:

This is sample text that would exist in a review document.

Suggestions:

review document.

☑ Check grammar

You will have similar options if the tool comes across possible spelling errors. Use the help button, ?, to find information about the current item in the spelling and grammar window.

Note: The grammar check will also pick any extra spaces that appear in the document.

☞ Spell & Grammar Check the current document

Additional information can be found on the Word Spelling & Grammar tool in the Word help menu. Go to `Help` on the pulldown menu for more details.

Paragraph Formatting

The Office of Information Technology (OIT) offers several courses on formatting in Microsoft Word. This course will cover some additional formatting tools, including paragraph formatting.

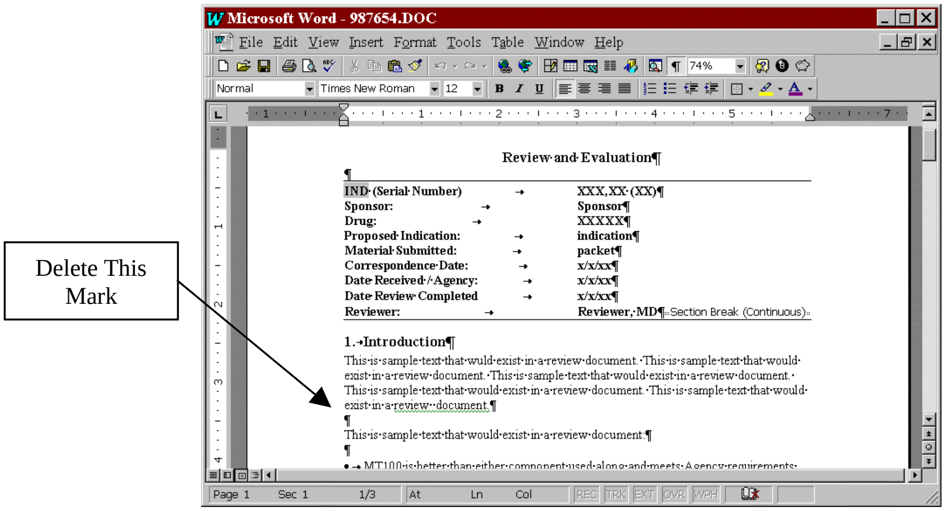
The author of this sample document used hard returns (pressing [ENTER]) to separate paragraphs. They also used hard returns to start another page at the end of a paragraph. These same functions can be repeated and standardized throughout the document using the paragraph-formatting feature. This formatting feature is used to change spacing and indenting inside and before/after paragraphs. Paragraph formatting can be applied to a style or to selected paragraphs in the document.

Instead of pressing [ENTER] twice at the end of each paragraph, we can set Word to automatically skip a certain amount of space at the end of every paragraph (when we press [ENTER]). This setting can be applied to a style or to selected text.

Use Word's paragraph formatting to change the first introductory paragraph of our sample review document:

☞ On the standard toolbar, click the Show/Hide button, ¶

☞ Delete the paragraph mark between the first and second paragraphs under `Introduction`


Microsoft Word - 987654.DOC
File Edit View Insert Format Tools Table Window Help
74%
Normal
Times New Roman
12
Delete This Mark
Page 1 Sec 1 1/3 At Ln Col REC TRK EXT OVR WPH

Review and Evaluation¶

¶

IND (Serial Number)	**XXX,XX (XX)¶**
Sponsor:	**Sponsor¶**
Drug:	**XXXXX¶**
Proposed Indication:	**indication¶**
Material Submitted:	**packet¶**
Correspondence Date:	**x/x/xx¶**
Date Received / Agency:	**x/x/xx¶**
Date Review Completed	**x/x/xx¶**
Reviewer:	**Reviewer, MD¶** Section Break (Continuous)

1. Introduction¶

This is sample text that wuld exist in a review document. This is sample text that would exist in a review document. This is sample text that would exist in a review document. This is sample text that would exist in a review document. This is sample text that would exist in a review document.¶

¶

This is sample text that would exist in a review document.¶

¶

- MT100 is better than either component used along and meets Agency requirements

- Click once in the first paragraph

- On the menu bar, go to `Format` | `Paragraph`

- Since the text is 12pt, change the `After:` in the `Spacing` section to 12pt.

- Click `OK`

You can also apply this paragraph formatting option to the whole document, or to your default style. When this formatting is applied to either, the line will automatically every time you press `[ENTER]`.

Let's look at the last two pages of the review document. You'll see the last paragraph is spread across the last two pages. You can use Word's paragraph formatting to force Word to not let paragraph's break across pages in you review document.

- Keep the Show/Hide button depressed

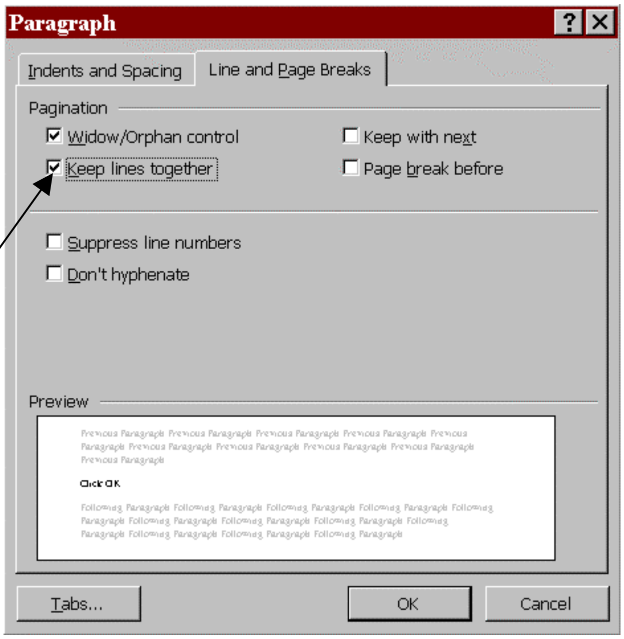
- Navigate to the bottom of the second page

- Click once in the paragraph that breaks between pages 2 and 3

- On the menu bar, go to `Format` | `Paragraph`

- Click on the `Line and Page Breaks` tab

- Check the `Keep Lines Together` box



☑ Widow/Orphan control
☑ Keep lines together
☐ Keep with next
☐ Page break before
☐ Suppress line numbers
☐ Don't hyphenate

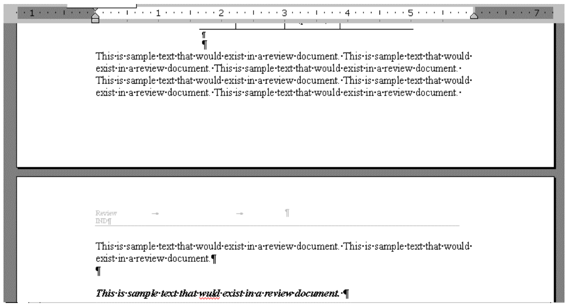
Click OK

Check This Box

☞ Click `OK`

When this formatting is applied to a paragraph, selected text, or a style, paragraphs will be prevented from breaking across pages. The paragraph in this example moved to top of page 3 rather than split across the pages.

Before



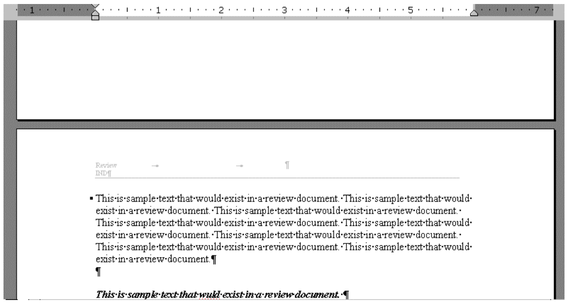
This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·

Review IND¶

This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.¶

This·is·sample·text·that·wuld·exist·in·a·review·document.·¶

After



Review IND¶

This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.¶

This·is·sample·text·that·wuld·exist·in·a·review·document.·¶

☞ On the standard toolbar, click the Show/Hide button, ¶, to hide non-printing characters

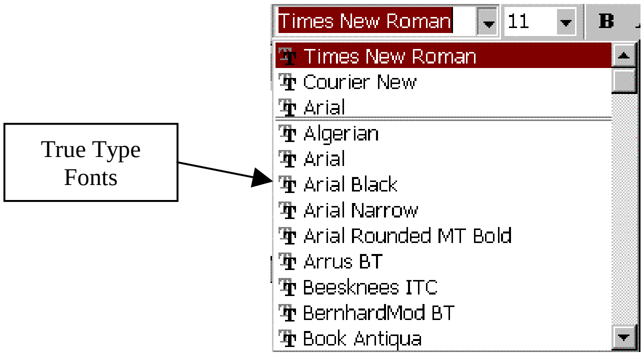
Right-click on any settings in the `Paragraph Formatting` window to find information about that setting. Use the Word help feature by going to `Help` on the menu bar. Also, OIT offers several courses concerning formatting in MS Word. See the OIT Web site for more details.

Font Formatting

All documents that will be archived must have fonts that are **True Type**. True Type fonts are designated by the True Type designation, T, in the formatting toolbar or are defined in the Font Formatting window.

To check to see if you are using a true type font:

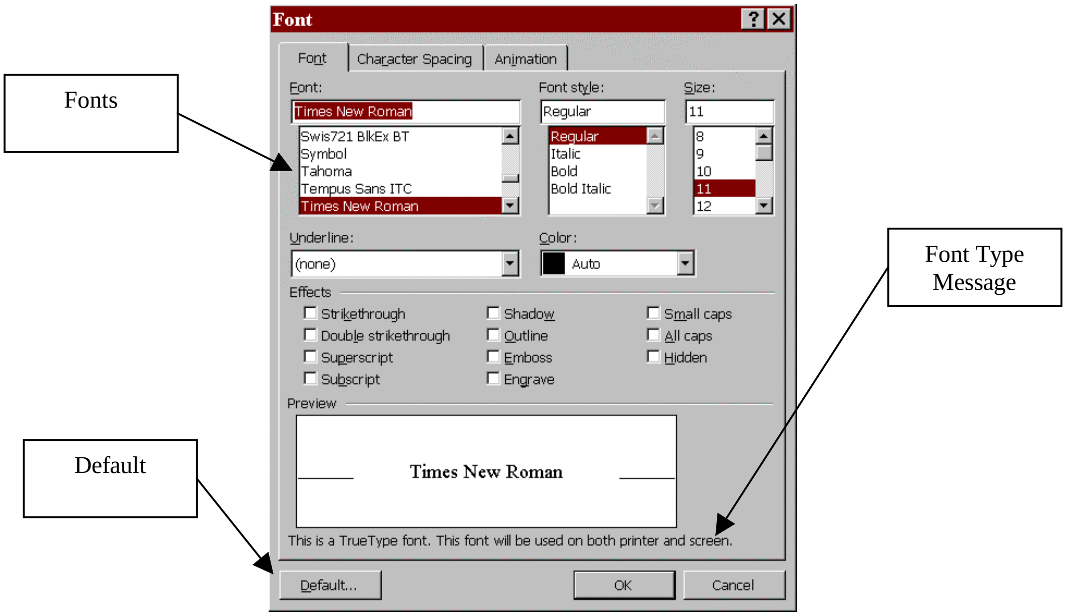
☞ On the formatting toolbar, click the pulldown arrow. The True Type symbol, T, will appear next to the font name of True Type fonts.


True Type Fonts
Times New Roman
11
B
Times New Roman
Courier New
Arial
Algerian
Arial
Arial Black
Arial Narrow
Arial Rounded MT Bold
Arrus BT
Beesknees ITC
BernhardMod BT
Book Antiqua

Or

☞ On the menu bar, go to `Format` | `Font`

☞ Choose a font. If it is a True Type font the message "**This is a True Type font. This font will be used on both the printer and the screen.**" will appear at the bottom of the window.


Fonts
Default
Font Type Message
Font
Font
Character Spacing
Animation
Swis721 BlkEx BT
Symbol
Tahoma
Tempus Sans ITC
Times New Roman
Italic
Bold
Bold Italic
8
9
10
12
Effects
☐ Strikethrough
☐ Double strikethrough
☐ Superscript
☐ Subscript
☐ Shadow
☐ Outline
☐ Emboss
☐ Engrave
☐ Small caps
☐ All caps
☐ Hidden
Preview
Times New Roman
Default...
OK
Cancel

Font: Times New Roman
Font style: Regular
Size: 11
Underline: (none)
Color: Auto

This is a TrueType font. This font will be used on both printer and screen.

Times New Roman and Arial are examples of some commonly used True Type Fonts. Once you have chosen a font, you can add it to your default style. You can also make that font your default font when Word launches the *Normal.dot* template in the `Font Formatting` window by clicking the `Default` button.

Page Breaks

A page break is the point at which one page ends and another begins. Two kinds of page breaks exist – soft (automatic) and hard (manual). Word automatically creates a new page when it reaches the end of a page – this is a soft page break. A manual, or hard, page break can be created to determine the exact location of the page break.

To create a hard page break:

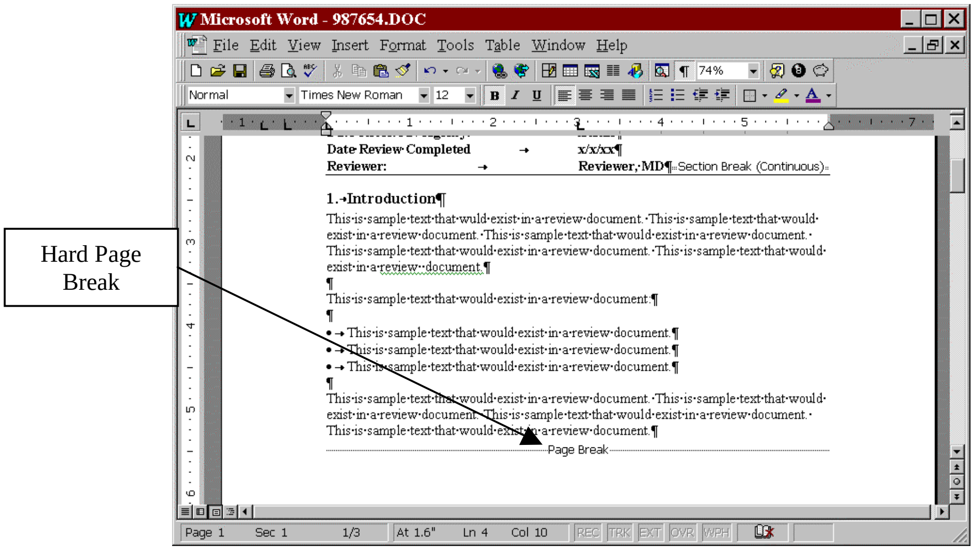
- ☞ Position the insertion point at the beginning of item 2 on page 1
- ☞ On the menu bar, go to `Insert` | `Break` to display the Break dialog box
- ☞ Click the radio button next to `Page Break`
- ☞ Click `OK`

OR

- ☞ Position the insertion point at the beginning of item 2 on page 1
- ☞ Press [`CTRL`] + [`ENTER`]

You can view hard page breaks by clicking the Show/hide button.

- ☞ Click the Show/Hide button, ¶, to display the page break


Microsoft Word - 987654.DOC
File Edit View Insert Format Tools Table Window Help
74%
Normal
Times New Roman
12
Page 1
Sec 1
1/3
At 1.6"
Ln 4
Col 10
REC
TRK
EXT
OVR
WPH

Hard Page Break

Date·Review·Completed → **x/x/xx¶**
Reviewer: → **Reviewer,·MD¶**::Section Break (Continuous)::

1.→Introduction¶

This·is·sample·text·that·wuld·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review··document.¶
¶
This·is·sample·text·that·would·exist·in·a·review·document:¶
¶
•→This·is·sample·text·that·would·exist·in·a·review·document.¶
•→This·is·sample·text·that·would·exist·in·a·review·document.¶
•→This·is·sample·text·that·would·exist·in·a·review·document.¶
¶
This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.¶
Page Break

Section Breaks

A section break is a mark you insert to show the end of a section. Sections store formatting such as margins, headers and footers, and pagination. Like the page break, the section break can be displayed using the Show/Hied button.

To create a section break:

☞ Position the insertion point on page 2 right before the last section

☞ On the menu bar, go to `Insert` | `Break`. The Break dialog box will appear

<u>Sections Break Options</u>

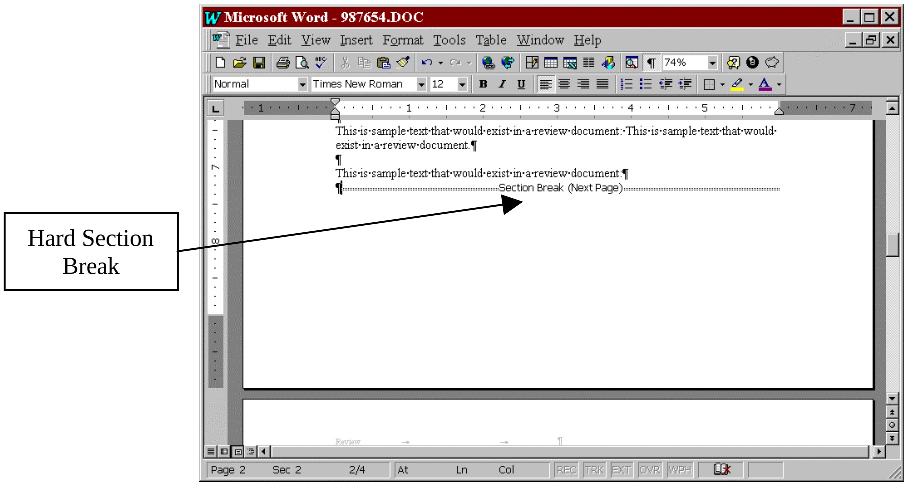
1. `Next page` inserts a page break as well as a section break and begins the next section at the top of the next page
2. `Continuous` inserts a section break in the middle of a page
3. `Even page` starts the next section on the next even-numbered page. This is used for chapters that begin on even-numbered pages. If needed, a blank page is inserted.
4. Odd page starts the next section on the next odd-numbered page. This is used for chapters that begin on odd-numbered pages. If needed, a blank page is inserted

☞ Select `Next page`

☞ Click `OK`

A hard section break has been inserted into the document.

☞ Click the Show/Hide button, ¶, to display the section break


Microsoft Word - 987654.DOC
File Edit View Insert Format Tools Table Window Help
74%
Normal
Times New Roman
12
Section Break (Next Page)
Page 2 Sec 2 2/4 At Ln Col REC TRK EXT OVR WPH
Hard Section Break

This·is·sample·text·that·would·exist·in·a·review·document.·This·is·sample·text·that·would·exist·in·a·review·document.¶
¶
This·is·sample·text·that·would·exist·in·a·review·document.¶

The status bar at the bottom left of the Word window now displays sections 1 and 2. Many of the settings that are controlled in the Page Setup feature can be applied to different sections in the review document.

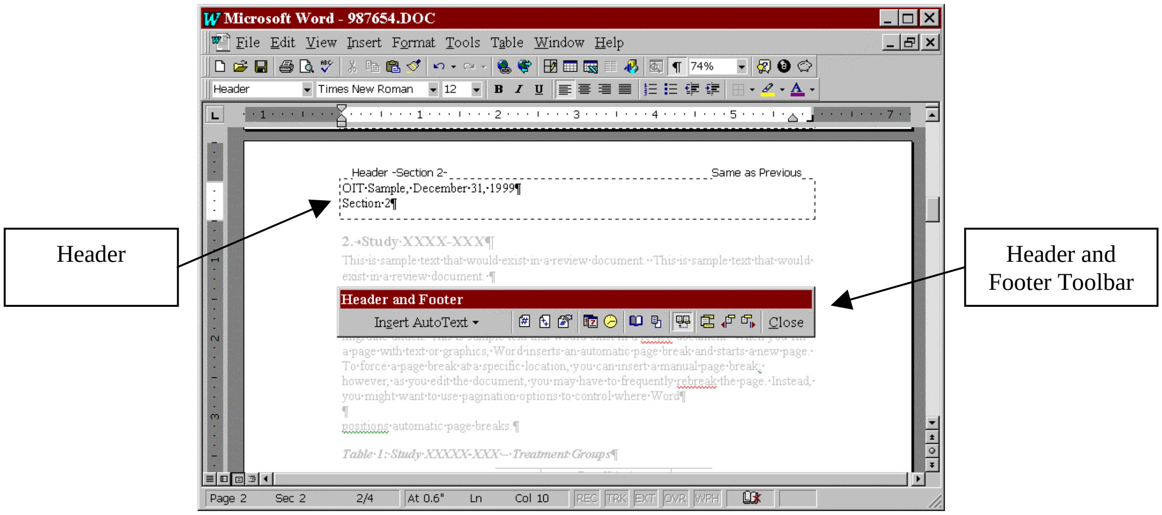
Headers and Footers

A header is text or graphics that is printed in the top margin of every page in a document. A footer contains information that is repeated in the bottom margin of every page. A unique header or footer can be placed on the first page of the document or each section, or omitted on the first page of the document or section. Different headers and footers can be placed on odd and even numbered pages or for each section in a document.

Because we have divided this review document into separate sections, we can have different headers and footers for each section.

Create different section 1 and section 2 headers:

- Click the Show/Hide button, ¶, to hide non-printing characters
- Navigate to the first page of the document
- On the menu bar, go to `View`|`Header and Footer`
- Type your name, the date and hit `[ENTER]`
- Type in the text **Section 1**


Microsoft Word - 987654.DOC
File Edit View Insert Format Tools Table Window Help
74%
Header
Times New Roman
12
Header -Section 2-
Same as Previous
Header and Footer
Insert AutoText
Close
Page 2
Sec 2
2/4
At 0.6"
Ln
Col 10
REC
TRK
EXT
OVR
WPH
Header
Header and Footer Toolbar

OIT·Sample,·December·31,·1999¶
Section·2¶

2.→Study·XXXX-XXX¶

This·is·sample·text·that·would·exist·in·a·review·document.··This·is·sample·text·that·would·exist·in·a·review·document.·¶

a·page·with·text·or·graphics,·Word·inserts·an·automatic·page·break·and·starts·a·new·page.·To·force·a·page·break·at·a·specific·location,·you·can·insert·a·manual·page·break;·however,·as·you·edit·the·document,·you·may·have·to·frequently·rebreak·the·page.·Instead,·you·might·want·to·use·pagination·options·to·control·where·Word¶
¶
positions·automatic·page·breaks.¶

Table·1:·Study·XXXXX-XXX—·Treatment·Groups¶

This footer is applied to the whole document because the next section header is set to be the same as the previous header in section 1.

To make a section 2 header:

- Click the Show Next button, , on the Header and Footer toolbar
- Click the Same As Previous Button, (Notice the change in the Header border!)
- Highlight and change **Section 1** to **Section 2**
- Click the `Close` button on the Header and Footer toolbar

Before we changed the section 2 header, it was necessary to turn off the same as previous function. Otherwise, the change would have applied to the section 1 header as well.

For additional information, please see the Word help menu by going to `Help` on the menu bar. OIT also offers complete Header and Footer instruction in the **Microsoft Word Formatting** course.

Pagination

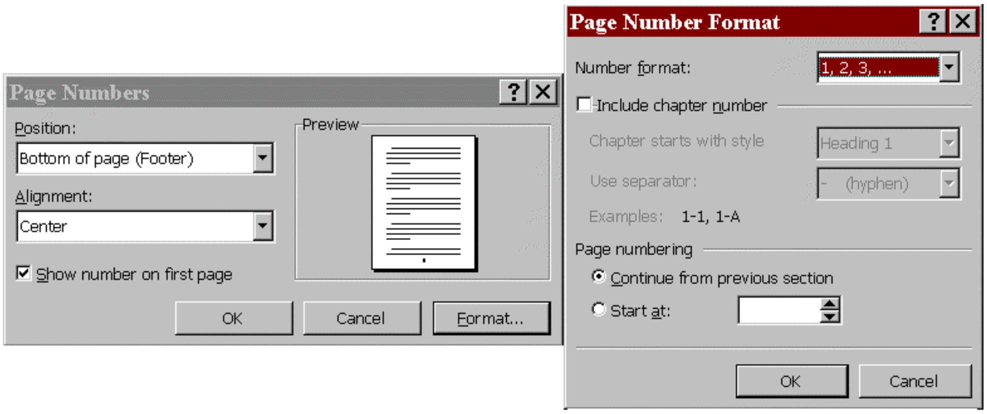
Now that the document has all of the section and page breaks and paragraph formatting has been complete, we have reached our total number of review document pages. At this point, we can setup page numbering for the document.

There are two methods for inserting page numbers. Since pagination normally exists in the Header or Footer, there is a feature on the Header or Footer toolbar that will insert page numbers. Another method is using the `Insert` option on the Word menu bar.

To insert page numbers from the `Insert` menu:

- Navigate to the beginning of the document
- On the menu bar, go to `Insert` | `Page Numbers`

The Page Numbers window will appear. Before you insert the page numbers, you can use the features in this window to place the numbers in the header or footer, align the numbers on the page, or not show the page number on the first page (uncheck the box). Clicking the `Format` button will allow you to change the type of numbering you use, add cross references to your numbering, and control numbering across sections.



Position: Bottom of page (Footer)

Alignment: Center

☑ Show number on first page

Number format: 1, 2, 3, ...

☐ Include chapter number

Chapter starts with style Heading 1

Use separator: - (hyphen)

Examples: 1-1, 1-A

Page numbering

● Continue from previous section

○ Start at:

- In the `Position:` field, make sure `Bottom of Page (Footer)` is selected
- In the `Alignment:` field, make sure `Center` is selected
- Make sure the `Show number on first page` box is checked
- Click OK

This procedure will place a page number, inside a text box, in the bottom center of footers in this document. If you add pages, page numbering will automatically update.

For additional information, please see the Word help menu by going to `Help` on the menu bar. OIT also offers complete page numbering instruction in the **Microsoft Word Formatting** course.

Headings

At the top of each topic, the headings are bolded and numbered (e.g., **1. Introduction**). These headings are styles that have been saved to control font, paragraph, tabs, bordering, language, borders and numbering. Microsoft Word uses the default heading style named in an ordered, numbered format - Heading 1, Heading 2, Heading 3, etc. The default leveling is in the same order. If we were to create a table of contents, the ordering would appear as follows:

Heading 1

Heading 2

Heading 3

We will find that when converting this review document to PDF final form, it is necessary to remember what styles we used for our multilevel headings. Since both the Adobe PDF Maker tool and Word's table feature use the Word default headings, we will do the same in this course.

Let's create a heading for the topics we separated into Section 2:

- Navigate to the top of the first page of section 2
- Insert the cursor just before the text **PID scores are show in Table 2**

- Press `[ENTER]` to create a blank line for the heading

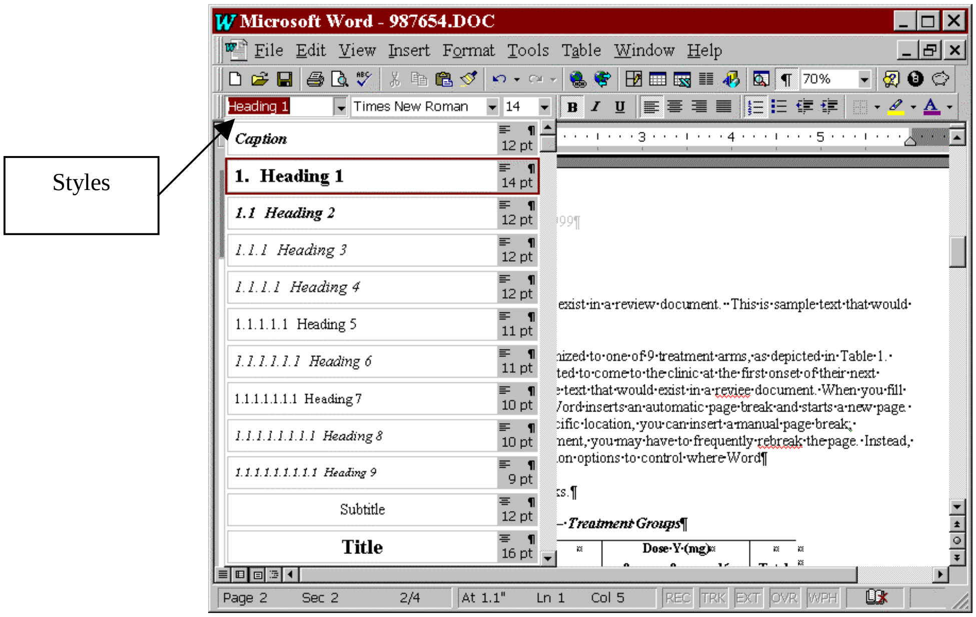
- Type the text **Additional Tables**

- Press `[ENTER]`

Now that we have the text for the heading, use the formatting toolbar to define the heading style. If you check the previous two headings, we see that they are `Heading 1` styles.

- On the formatting toolbar, click the pulldown menu in the `style` feature

- Choose Heading 1 from the list


Styles
Microsoft Word - 987654.DOC
File Edit View Insert Format Tools Table Window Help
70%
Heading 1
Times New Roman
14
Caption 12 pt
1. Heading 1 14 pt
1.1 Heading 2 12 pt
1.1.1 Heading 3 12 pt
1.1.1.1 Heading 4 12 pt
1.1.1.1.1 Heading 5 11 pt
1.1.1.1.1.1 Heading 6 11 pt
1.1.1.1.1.1.1 Heading 7 10 pt
1.1.1.1.1.1.1.1 Heading 8 10 pt
1.1.1.1.1.1.1.1.1 Heading 9 9 pt
Subtitle 12 pt
Title 16 pt
Treatment Groups¶
Dose·Y·(mg)
Page 2 Sec 2 2/4 At 1.1" Ln 1 Col 5 REC TRK EXT OVR WPH

Not only does the new heading take on the font and paragraph formatting of the style, but it is also numbered at **3.**, as it is the third *Heading 1* style in the document. Numbering is not a default setting to the *Heading 1* style.

To see how this format was applied, we will remove the numbering from the *Heading 1* style:

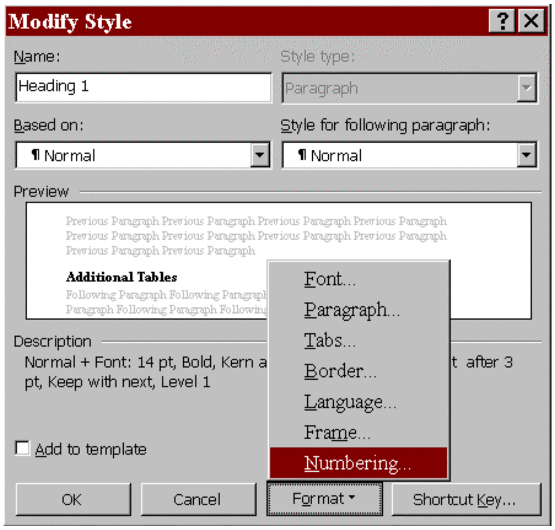
- On the menu bar, go to `Format` | `Style`

- In the `Styles:` field, select `Heading 1`

- Click `Modify`

- In the Modify Style window, click the `Format` button. A list of formatting options will appear.

- Choose `Numbering`


Modify Style
Font...
Paragraph...
Tabs...
Border...
Language...
Frame...
Numbering...
OK
Cancel
Format
Shortcut Key...

Name: Heading 1

Style type: Paragraph

Based on: ¶ Normal

Style for following paragraph: ¶ Normal

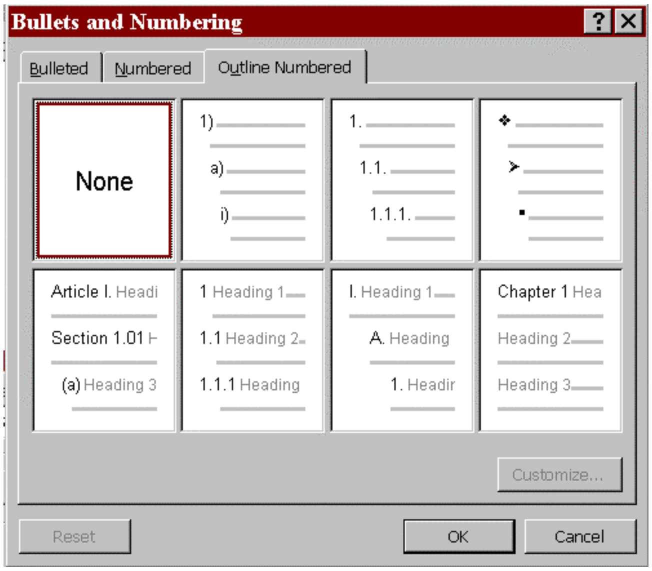
Preview

Description

Normal + Font: 14 pt, Bold, Kern a t after 3 pt, Keep with next, Level 1

☐ Add to template

- In the Bullets and Numbering window, select the `None` box
- Click OK


Bullets and Numbering
Bulleted
Numbered
Outline Numbered
None
1)
a)
i)
1.
1.1.
1.1.1.
Article I. Headi
Section 1.01 H
(a) Heading 3
1 Heading 1
1.1 Heading 2
1.1.1 Heading
I. Heading 1
A. Heading
1. Headir
Chapter 1 Hea
Heading 2
Heading 3
Customize...
Reset
OK
Cancel

- Click `OK` in the Modify Style window
- Click `Close` in the Style window (make sure you **do not** click `Apply`. The style has already been modified at this point.)

If we were creating a numbered heading list, we could have chosen one of the available formats in the Bullets and Numbering window or used this window to customize your own numbering.

For additional information, please see the Word help menu by going to `Help` on the menu bar. OIT also offers complete Styles instruction in the **Introduction to Microsoft Word** course.

Table of Contents

Another reason for using the Word default style settings for headings is the same defaults are used in the Table of Contents feature. This feature scans the current document looking for predefined outline styles. The same hierarchy (*Heading 1* > *Heading 2*, etc.) we discussed in the previous topic is the default hierarchy for a Word table of contents. Once the styles are found a table of contents is created, and it looks depends on the chosen format.

In order to examine the Table of Contents feature lets create a table of contents for this sample review document:

- Press `[CTRL]` + `[Home]` to move your cursor to the beginning of the document

- Make sure the **OVR** on the status bar is turned off by pressing `[Insert]` on the keyboard to toggle between off and on (otherwise, your page break would overwrite the first character in the document)

- Create a separate page for the table of contents by inserting a page break. On the menu bar, go to `Insert|Break`

- Choose `Page Break` from the list

- Click `OK.` A new page is created at the beginning of the document

  (Pressing `[CTRL]` + `[ENTER]` will duplicate the previous three steps)

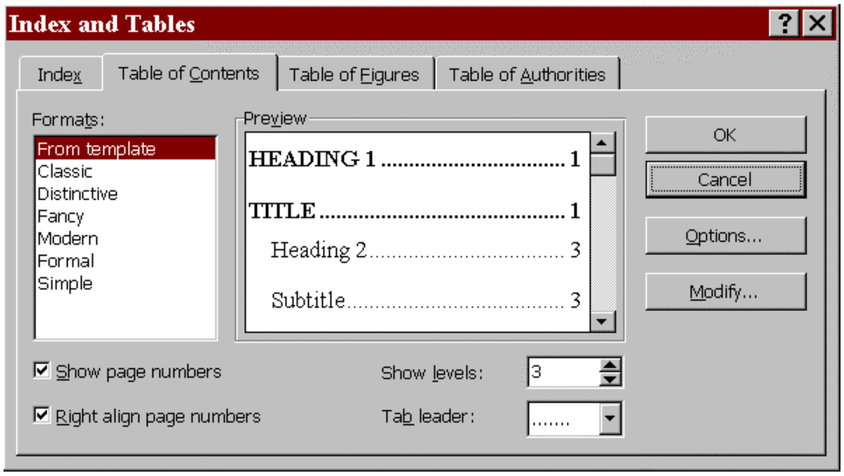
- Navigate up to the beginning of the new page

- Make sure the page is aligned to the left

- Type the words **Table of Contents** and press `[ENTER]`

- On the menu bar, go to `Insert|Index and Tables`

- Click on the `Table of Contents` tab


Index and Tables
?
Index
Table of Contents
Table of Figures
Table of Authorities
Formats:
From template
Classic
Distinctive
Fancy
Modern
Formal
Simple
Preview
HEADING 1 1
TITLE 1
Heading 2 3
Subtitle 3
OK
Cancel
Options...
Modify...

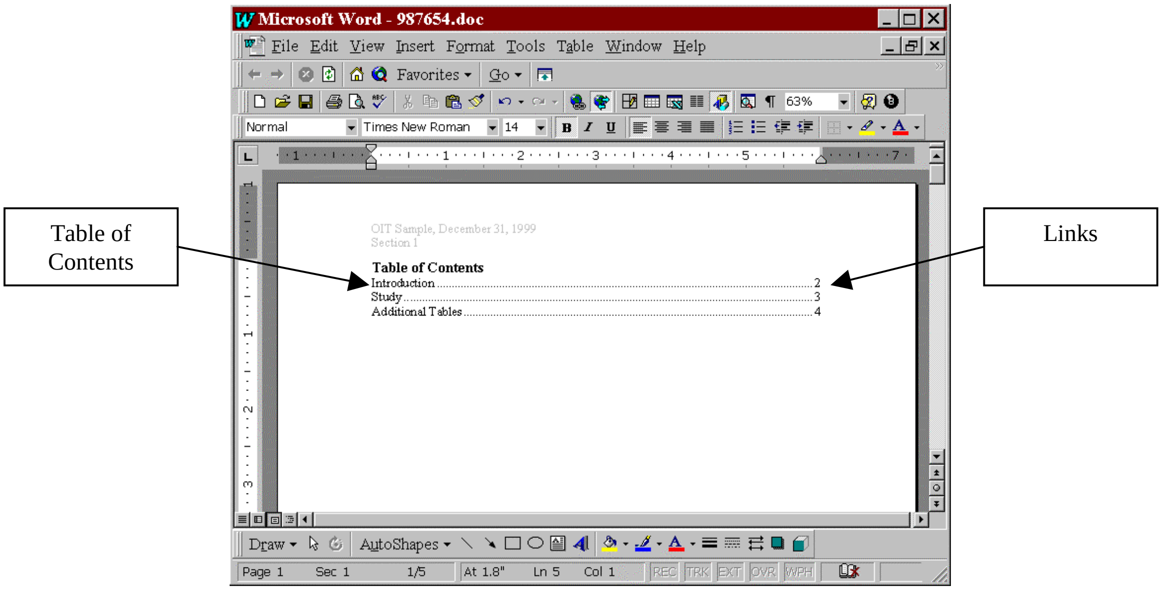
☑ Show page numbers

☑ Right align page numbers

Show levels: 3

Tab leader: ....

- Choose a setting in the Format: field.
- Make sure the `Show page numbers` and `Right align page numbers` boxes are checked
- Show 3 levels and use the **…….** Tab leader
- Click `OK`


Microsoft Word - 987654.doc
File Edit View Insert Format Tools Table Window Help
Favorites Go
63%
Normal
Times New Roman
14
Draw AutoShapes
Page 1 Sec 1 1/5 At 1.8" Ln 5 Col 1 REC TRK EXT OVR WPH
Table of Contents
Links

OIT Sample, December 31, 1999
Section 1

Table of Contents
Introduction 2
Study 3
Additional Tables 4

A table of contents is inserted. If you click on the page numbers in the list, you'll see that there is a link established between the table of contents and the corresponding heading for that topic. If you use separate heading styles, you will have to change your table of contents setup by using the `Options` button in the Table of Contents window.

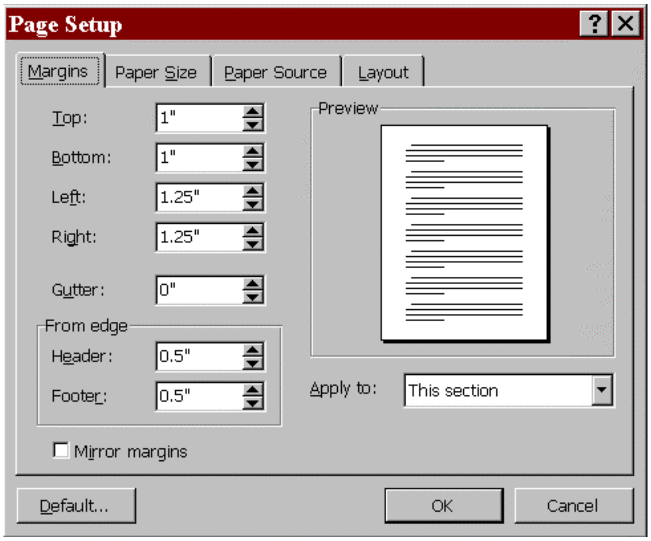
For additional information, please see the Word help menu by going to `Help` on the menu bar.

Additional Formatting

The look of your review document may depend on policies that exist within your discipline or division. Use the guides below to change you review document formatting based on these policies.

Page Setup

On the menu bar, go to `File` | `Page Setup` to make changes to your page margins, paper size, orientation, paper source, section headers and footers, and vertical alignment.



Top: 1"
Bottom: 1"
Left: 1.25"
Right: 1.25"
Gutter: 0"
From edge
Header: 0.5"
Footer: 0.5"
Apply to: This section
☐ Mirror margins

The changes made in page setup can be applied to a single page, from that point forward in the document, or to a specific section.

OIT Classes

OIT offers introductory to Microsoft Word classes in the areas of **Introduction to Formatting**, **Formatting**, and **Tables**. It is recommended that you attend these courses, or become familiar with their practices before taking this course.

Policies

Other than the rule on True Type fonts, the formatting procedures used in the course are for instructional purposes only. Please consult the guidelines used in your division or discipline for writing samples and guides for your review documents.

Saving Your Final Draft

Now that all of your formatting has been completed, save your final draft copy.

☞ On the menu bar, go to File | Save As

☞ Save the document as **C:\My Documents\987654.doc**

At this point, you review document is ready for conversion to final PDF form.

Review

To test your knowledge of the topics covered in chapter 2, answer the following questions:

- What are the two types of final form review documents used in the center?
- What printer driver should be selected for final form review documents?
- What features does the Show/Hide button display?
- What type of break is a manual break? An automatic break?
- What window allows you to change style formatting?
- What type of fonts should be used in review documents?

Chapter 3 - Converting Documents to PDF Final Form

Once you’ve completed formatting a review document in Microsoft Word 97, you are ready to convert the document to its final form. This chapter will discuss how to use Microsoft Word plug-ins and Adobe Acrobat 4.0 to create final form PDF documents. Once the document has been converted to PDF, use Adobe Acrobat 4.0 to proof the document before checking it into the Division Files System (DFS).

Windows 95 printer settings, the Microsoft Word Adobe PageMaker plug-in, and features in Adobe Acrobat 4.0 will be used in this chapter.

This chapter will take about 45 minutes to complete.

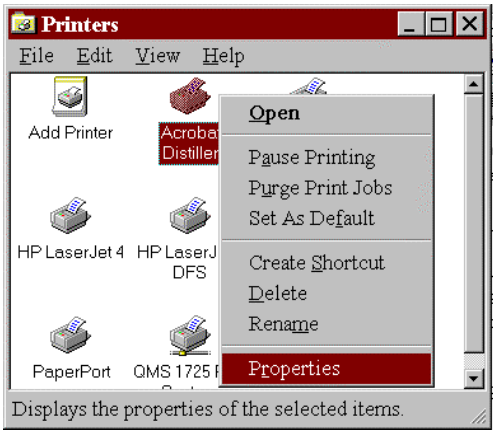
Setting the PDF Output File Destination

Before converting review documents to Portable Document Format (PDF), you need to set the destination of the final form document. With a printer, the file comes out in hard copy paper. When creating documents in the "electronic paper" PDF format, we need to choose a directory, or folder, destination for the PDF output file.

The default folder is `C:\Program Files\Adobe\Acrobat 4.0\PDF Output`. You may have a certain folder on your hard drive or network share where you intend to store your final form documents before checking them into the Division Files System. To change the PDF output folder:

☞ On the Windows 95 taskbar, go to `Start` | `Settings` | `Printers`

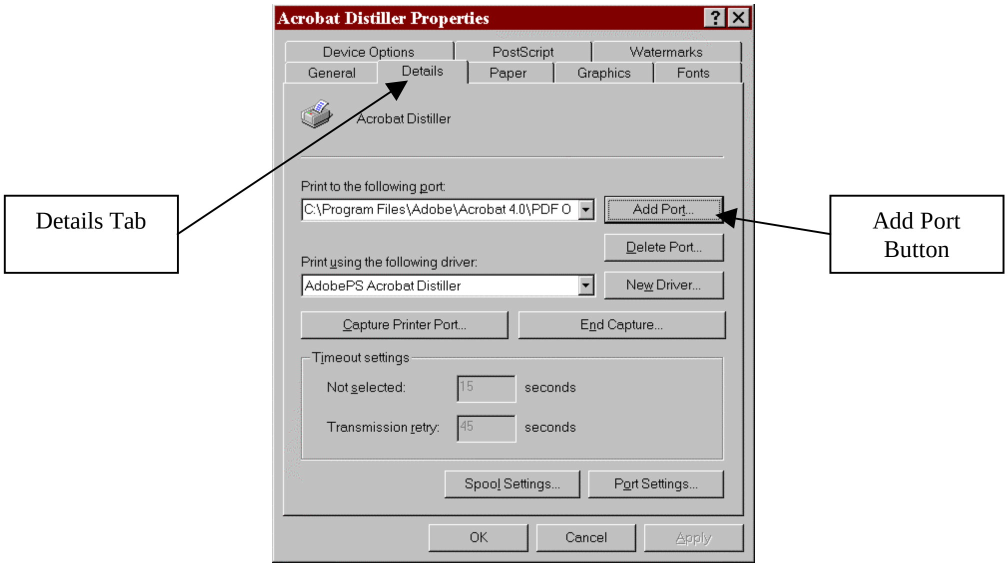
☞ In the Printers window, right click on the Distiller printer and choose `Properties`


Printers
File Edit View Help
Add Printer
Acrobat Distiller
HP LaserJet 4
HP LaserJ DFS
PaperPort
QMS 1725 P
Open
Pause Printing
Purge Print Jobs
Set As Default
Create Shortcut
Delete
Rename
Properties

Displays the properties of the selected items.

☞ In the Acrobat Distiller Properties window, click on the `Details` tab

☞ Click the `Add Port` button


Acrobat Distiller Properties
Device Options
PostScript
Watermarks
General
Details
Paper
Graphics
Fonts
Acrobat Distiller
Add Port...
Delete Port...
New Driver...
Capture Printer Port...
End Capture...
Spool Settings...
Port Settings...
OK
Cancel
Apply
Details Tab
Add Port Button

Print to the following port: C:\Program Files\Adobe\Acrobat 4.0\PDF O

Print using the following driver: AdobePS Acrobat Distiller

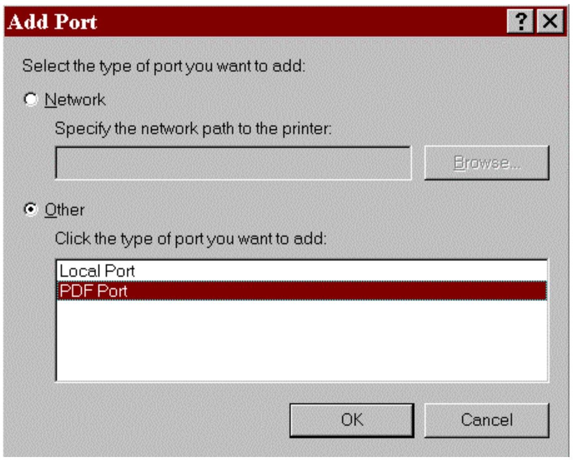
Timeout settings

Not selected: 15 seconds

Transmission retry: 45 seconds

- In the Add Port window, select the `Other` radio button

- Highlight and click on `PDF Port`



Add Port

Select the type of port you want to add:

○ Network

Specify the network path to the printer:

● Other

Click the type of port you want to add:

Local Port
PDF Port

- Click `OK`

- In the browser, select the `C:\My Documents` folder in the browser

- Click `OK`

- Click `Close` in the Printer Ports dialog box

- Click `OK` in the Acrobat Distiller Properties window

PDF files created using Acrobat Distiller will be placed in the `C:\My Documents` folder.

Note: PDF files created using PDF Writer will be placed in the same folder as their source Word document. The next topic talks about the differences between Acrobat Distiller and PDF Writer.

PDF Maker

When Adobe Acrobat 4.0 is installed on your PC, an additional plug-in that works with Microsoft Word 97 is installed as well. The PDF Maker 4.0 plug-in is a tool that will allow you to create a Portable Document Format (PDF) file directly from the Word menu bar or toolbar.

Before using PDF Maker to create your PDF final form document, you need to decide which Acrobat PDF creation tool you will use in conjunction with PDF Maker. Adobe Acrobat 4.0 comes with two tools, **PDF Writer** and **Distiller**. Both tools create PDF files, and have advantages and disadvantages depending on the circumstance.

PDF Writer is a printer driver that converts files to PDF quickly. It is most suitable for documents that contain mainly text. Distiller creates a PDF file from a PostScript version of a document. A PDF file created by Distiller maintains all the formatting, graphics, and photographic images from the original document, and it provides more precise control over the conversion process than PDF Writer. Use the table on the top of the next page as a guide to decide which tool you will use in conjunction with PDF Maker.

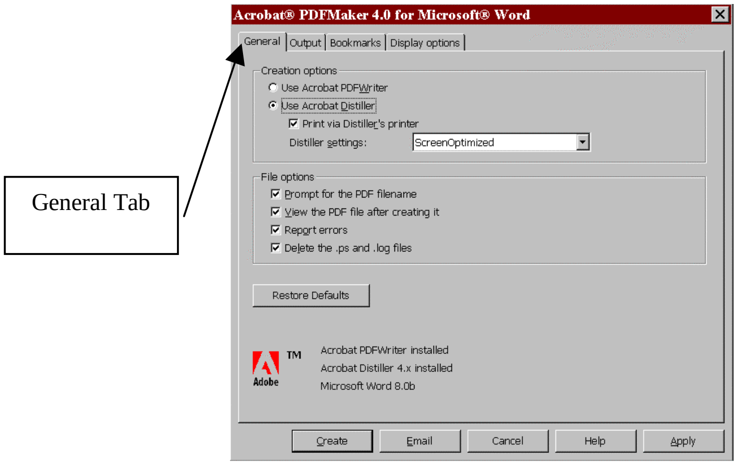
When…	**Use this tool…**
Converting documents with little or no graphics	PDF Writer
Your system has a limited amount of RAM	
You want quickness over readability	
Converting documents where you want to maintain bookmarks, headings, or hyperlinks in the PDF final form	Acrobat Distiller
Converting documents with graphics or figures	
Choose advanced compression utilities	

Since our source review document contains hyperlinks from the table of contents to headings throughout the document, we are going to use Distiller as our PDF creation tool. Now we are ready to create our PDF final form document.

To create a PDF file using PDF Maker and Distiller:

- On the Word menu bar, go to `File` | `Create Adobe PDF`… The PDF Maker will display.
- On the `General` Tab, make sure the following settings are checked:

Setting	Purpose
Use Acrobat Distiller	Uses distiller to create the PDF file
Print via Distiller's printer	Uses distiller's printer instead of the default
Screen Optimized	Produces a PDF file best suited for online viewing
Prompt for PDF filename	Prompt's you to enter the name of your new PDF final form file
View the PDF after creating it	Launches Acrobat 4.0 to proof the document
Report errors	Display a listing of any errors during PDF creation
Delete the .ps and .log files	Removes files used during PDF creation



Creation options
○ Use Acrobat PDFWriter
● Use Acrobat Distiller
☑ Print via Distiller's printer
Distiller settings: ScreenOptimized

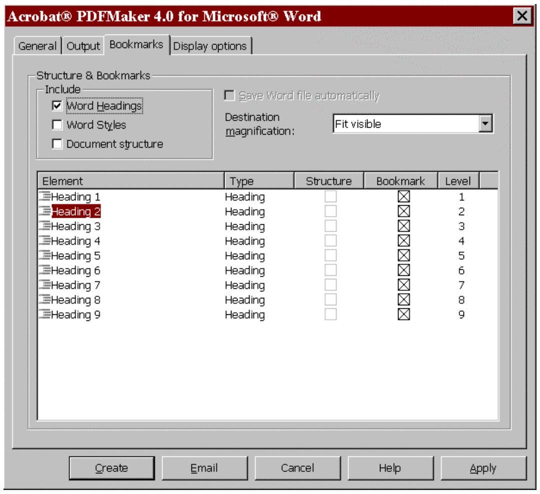
File options
☑ Prompt for the PDF filename
☑ View the PDF file after creating it
☑ Report errors
☑ Delete the .ps and .log files

Acrobat PDFWriter installed
Acrobat Distiller 4.x installed
Microsoft Word 8.0b

The `Output` tab controls what items are captured in the PDF final form document. We are going to use the PDF Maker defaults for output.

☞ Click the `Bookmarks` tab but DO NOT MAKE CHANGES

The Bookmarks tab is used to decide which links Distiller will capture in the PDF final form document. When the `Word Headings` box is checked, Distiller will use the Word heading defaults that we discussed in the previous lesson. The headings will appear as bookmarks in the navigation pane of the new PDF output file. These bookmarks will also contain hyperlinks to the headings throughout the final form of the review document, just as the table of contents did in the Word version we created in the last lesson.


Acrobat® PDFMaker 4.0 for Microsoft® Word
General
Output
Bookmarks
Display options
Create
Email
Cancel
Help
Apply

Structure & Bookmarks
Include
☑ Word Headings
☐ Word Styles
☐ Document structure

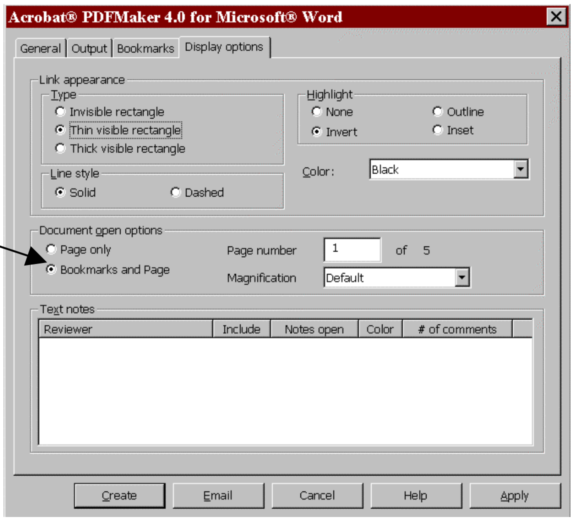
☐ Save Word file automatically
Destination magnification: Fit visible

Element	Type	Structure	Bookmark	Level
Heading 1	Heading	☐	☒	1
Heading 2	Heading	☐	☒	2
Heading 3	Heading	☐	☒	3
Heading 4	Heading	☐	☒	4
Heading 5	Heading	☐	☒	5
Heading 6	Heading	☐	☒	6
Heading 7	Heading	☐	☒	7
Heading 8	Heading	☐	☒	8
Heading 9	Heading	☐	☒	9

☞ Click the `Display Options` tab

☞ Click the Bookmarks and Page Radio button

The Display Options tab will let you change the appearance of boxes, lines, highlights, and will let you decide if the PDF file will display both the navigation pane with the bookmarks taken from the captured Word headings and the pages of the new file when Acrobat 4.0 launches.


Acrobat® PDFMaker 4.0 for Microsoft® Word
General
Output
Bookmarks
Display options
Create
Email
Cancel
Help
Apply

Bookmarks and Page

Link appearance
Type
○ Invisible rectangle
● Thin visible rectangle
○ Thick visible rectangle
Line style
● Solid ○ Dashed

Highlight
○ None ○ Outline
● Invert ○ Inset
Color: Black

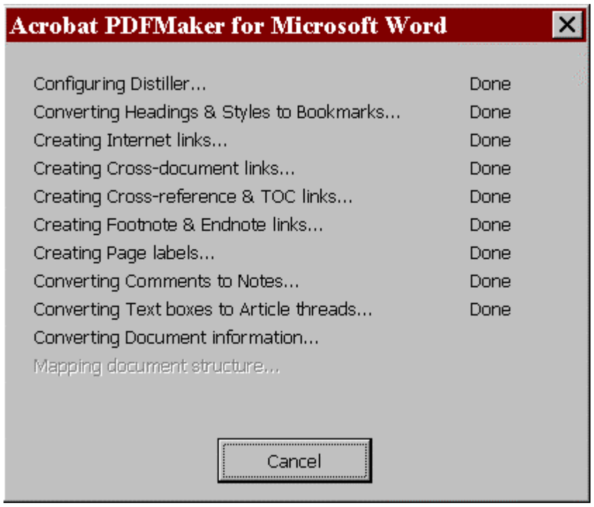
Document open options
○ Page only
● Bookmarks and Page
Page number 1 of 5
Magnification Default

Text notes

Reviewer	Include	Notes open	Color	# of comments

- Click `Create`

- Wait while the PDF Maker status box appears and runs through each step



Configuring Distiller... Done
Converting Headings & Styles to Bookmarks... Done
Creating Internet links... Done
Creating Cross-document links... Done
Creating Cross-reference & TOC links... Done
Creating Footnote & Endnote links... Done
Creating Page labels... Done
Converting Comments to Notes... Done
Converting Text boxes to Article threads... Done
Converting Document information...
Mapping document structure...

- When the `Save PDF file as` window appears, save the file `as C:\My Documents\987654.pdf`

- Wait while Distiller creates the PDF file. Once the process is complete, Adobe Acrobat 4.0 will appear with your final form PDF document displayed in the main window.

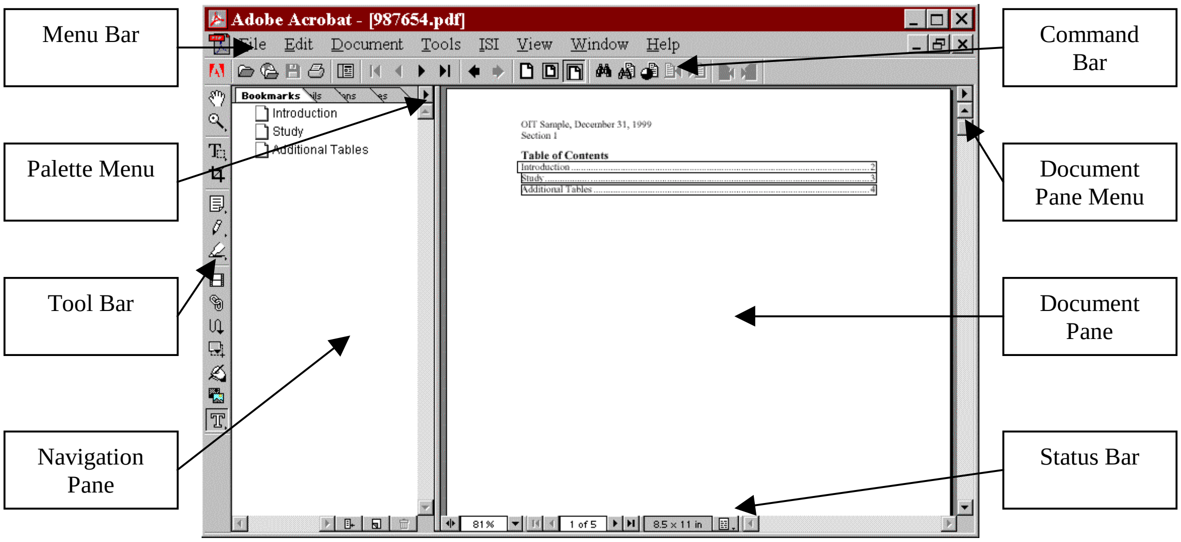
For more information on PDF Maker, click the `Help` button in the PDF maker window in Microsoft Word or consult the Acrobat Guide under `Help` on the Acrobat 4.0 menu bar.

Proofing with Adobe Acrobat 4.0

Once Distiller has completed converting the Word review document to PDF, you can use the tools available in Adobe Acrobat 4.0 to browse and proof the PDF review document.

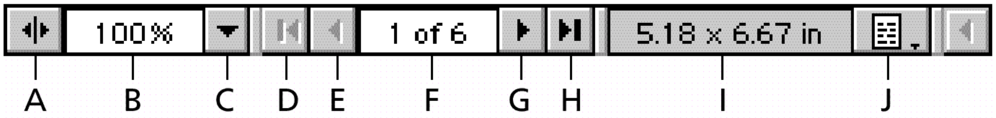
Looking At the Work Area

The Adobe Acrobat work area consists of the command menus at the top of the screen, the toolbar containing various tools and button controls, the document window containing the active document, and the informational status bar at the bottom of the screen.


Menu Bar
Command Bar
Palette Menu
Document Pane Menu
Tool Bar
Document Pane
Navigation Pane
Status Bar
Adobe Acrobat - [987654.pdf]
File Edit Document Tools ISI View Window Help
Bookmarks
Introduction
Study
Additional Tables
OIT Sample, December 31, 1999
Section 1
Table of Contents
Introduction
Study
Additional Tables
81%
1 of 5
8.5 x 11 in

Looking At the Status Bar

The buttons and menus in the status bar provide quick ways to change your on-screen display and to navigate through documents.


100%
1 of 6
5.18 x 6.67 in
A
B
C
D
E
F
G
H
I
J

A. Navigation Pane button **B.** Magnification level **C.** Magnification pop-up menu **D.** First Page button **E.** Previous Page button **F.** Current page **G.** Next Page button **H.** Last Page button **I.** Page size **J.** Page Layout pop-up menu

Using the Browse Buttons

Use these browse buttons in the command bar:

1. The Next Page button, ▶
2. The Previous Page button, ◀
3. The Last Page button, ▶|
4. The First Page button, |◀

☞ Browse through the document using the browse buttons.

Retracing Your Viewing Path

In Acrobat, a view consists of a specific page and a specific magnification displayed on your screen. Acrobat's links and interactive features let you jump quickly and easily to different views.

The Go To Previous View button, ←, is useful for retracing your viewing path through a document, especially when you have followed a complex series of links and changed magnification levels several times.

To retrace your viewing path:

1. Click the Go To Previous View button, ←, in the command bar
2. Click the Go To Next View button, →, for each step forward

You can click the Go Back button repeatedly to retrace your viewing path, view by view for up to 64 views, through a document. If you have followed a link to another PDF document, the Go Back button can also return you to your original document.

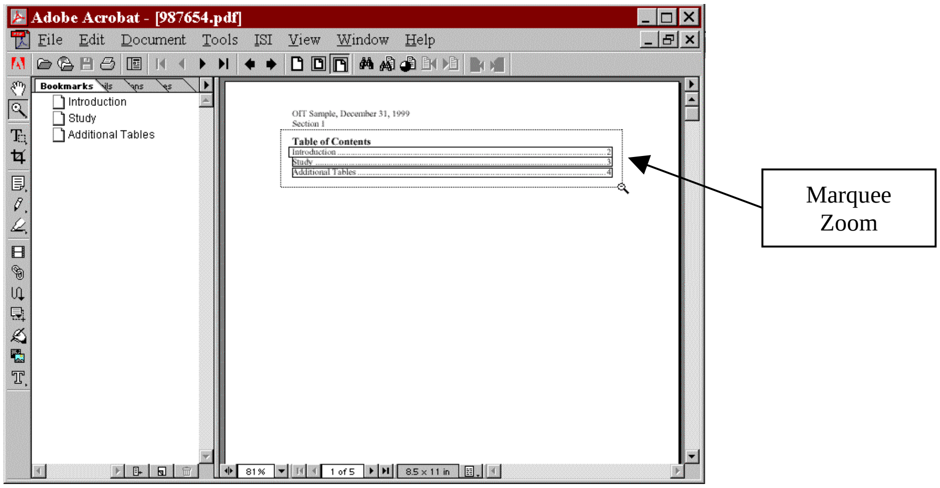
☞ Click the Go To Previous View button, ←, in the command bar until you are back to the original view of the review document.

Changing the View Magnification

You can change the magnification of the page view using built-in controls in the toolbar, or by clicking or dragging in the page with the zoom tool.

Magnification tools:

1. To resize the page to fit entirely in the window, click the Fit In Window button, 🗋
2. To resize the page to fit the width of the window, click the Fit Width button, 🗋
3. To return a page to its actual size, click the Actual Size button, 🗋
4. Click the zoom tool (🔍) in the toolbar. You can either drag a rectangle around the area of the page you want magnified (this is called marquee zooming) or you can click on an area of the page to magnify.


Adobe Acrobat - [987654.pdf]
File Edit Document Tools ISI View Window Help
Bookmarks
Introduction
Study
Additional Tables
OIT Sample, December 31, 1999
Section 1
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Introduction
Study
Additional Tables
81%
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8.5 x 11 in
Marquee Zoom

- Use the Zoom tool to do a marquee zoom around the table of contents
- Click the Go To Previous View button, ←, in the command bar to go back top the previous view

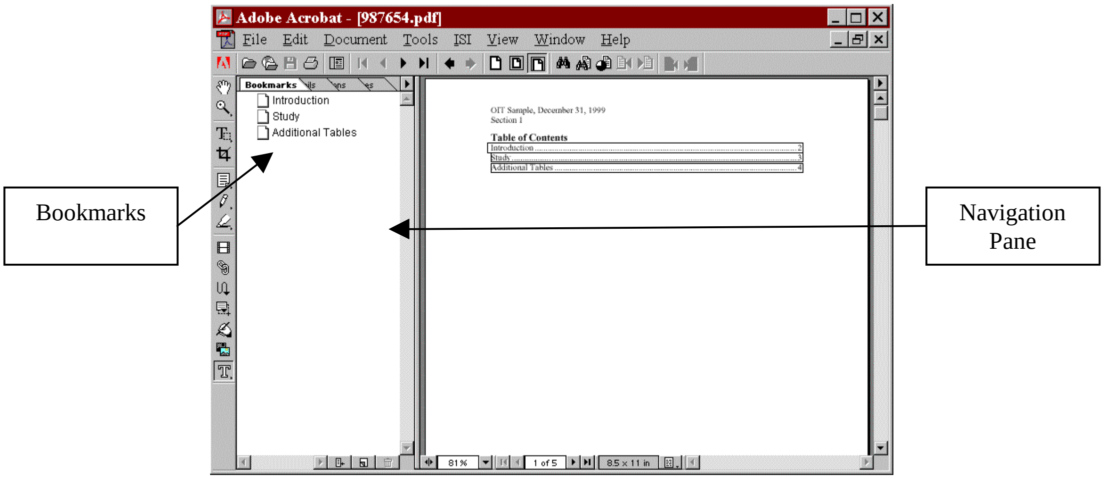
You can also use the magnification option on the status bar, 79% ▾, at the bottom of the screen to change the magnification.

Using Bookmarks

A bookmark is a type of link in the navigation pane. Each bookmark in the navigation pane goes to a different view or page in the document. When we created the PDF review document, we set the PDF Maker settings to capture the Word headings as bookmarks. We also set the navigation pane to automatically appear.

To use bookmarks:

- Move your pointer over a bookmark in the navigation pane and click to go that selection


Adobe Acrobat - [987654.pdf]
File Edit Document Tools ISI View Window Help
Bookmarks
Introduction
Study
Additional Tables
OIT Sample, December 31, 1999
Section 1
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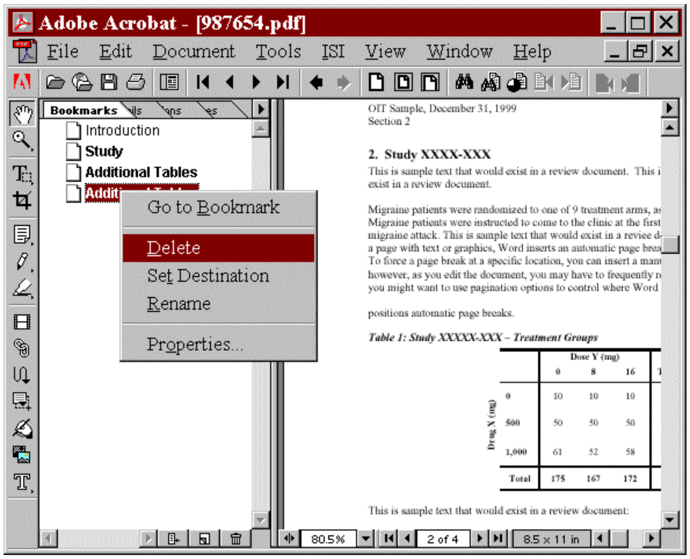
Introduction
Study
Additional Tables
81%
1 of 5
8.5 x 11 in
Bookmarks
Navigation Pane

To delete a bookmark:

When we created the PDF file, an additional bookmark was created from a hyperlink that existed in the original Word document. Unwanted bookmarks can be deleted with the following:

- ☞ Right-click on the last `Additional Tables` bookmark
- ☞ Choose `Delete` from the menu


Adobe Acrobat - [987654.pdf]
File
Edit
Document
Tools
ISI
View
Window
Help
Bookmarks
Introduction
Study
Additional Tables
Go to Bookmark
Delete
Set Destination
Rename
Properties...
80.5%
2 of 4
8.5 x 11 in

OIT Sample, December 31, 1999
Section 2

2. Study XXXX-XXX

This is sample text that would exist in a review document. This i
exist in a review document.

Migraine patients were randomized to one of 9 treatment arms, as
Migraine patients were instructed to come to the clinic at the first
migraine attack. This is sample text that would exist in a reviee d
a page with text or graphics, Word inserts an automatic page brea
To force a page break at a specific location, you can insert a man
however, as you edit the document, you may have to frequently r
you might want to use pagination options to control where Word

positions automatic page breaks.

Table 1: Study XXXXX-XXX – Treatment Groups

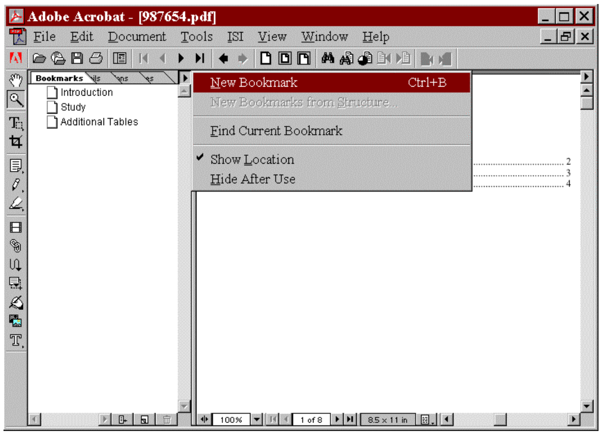
		Dose Y (mg)		
		0	8	16
Drug X (mg)	0	10	10	10
	500	50	50	50
	1,000	61	52	58
	Total	175	167	172

This is sample text that would exist in a review document:

We can also add a bookmark that points to the table of contents.

To add a bookmark:

- ☞ Use the first page button, ⏮, to navigate to the table of contents
- ☞ Modify the view so it directs the reader’s attention to the table of contents
- ☞ Choose `New Bookmark` from the Bookmarks palette menu, or select the new bookmark icon, ◱, at the bottom of the Bookmarks palette


Adobe Acrobat - [987654.pdf]
File
Edit
Document
Tools
ISI
View
Window
Help
Bookmarks
Introduction
Study
Additional Tables
New Bookmark Ctrl+B
New Bookmarks from Structure...
Find Current Bookmark
✓ Show Location
Hide After Use
2
3
4
100%
1 of 8
8.5 x 11 in

☞ Type **Table of Contents** the bookmark label, and press [ENTER]

☞ Click and drag the icon to the top of the bookmark palette

To make sure the correct location and magnification are set, go to another page in the document, and then test the bookmark.

Inserting Additional Files

You may wish to add documentation from applications other than Microsoft Word to your final form review document. Since PDF files can be created from multiple sources, you can also add e-mail messages, spreadsheets, or other types of electronic files to your existing PDF review document.

Depending on the type of file you wish to convert, there are several processes that allow you to create a PDF file and attach it to an existing PDF review document. In this example, we will create an e-mail message in TeamLinks and then convert that message to PDF format. The new PDF file will then be inserted into the end of our PDF review document.

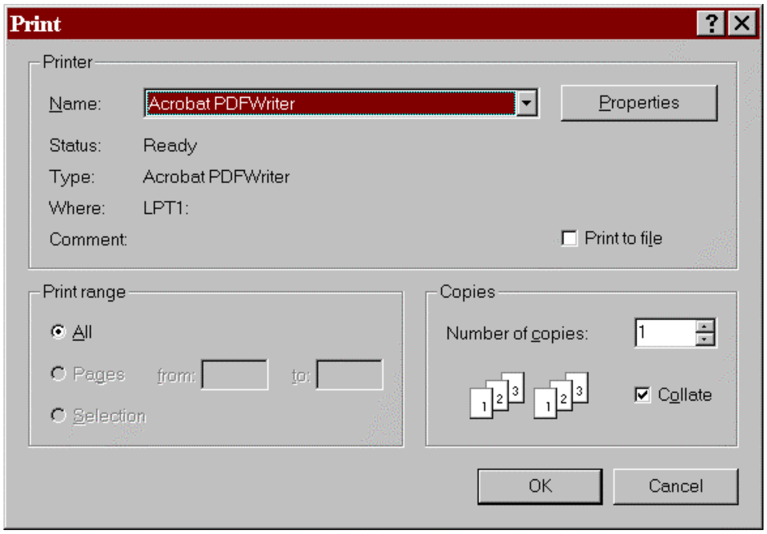
To add an e-mail message to our PDF review document:

☞ In TeamLinks, create and send a message to yourself (you may add sample text that would normally exist in a review discussion)

☞ Once the e-mail is created, open and read the message

☞ In the TeamLinks Read window, go to File | Print

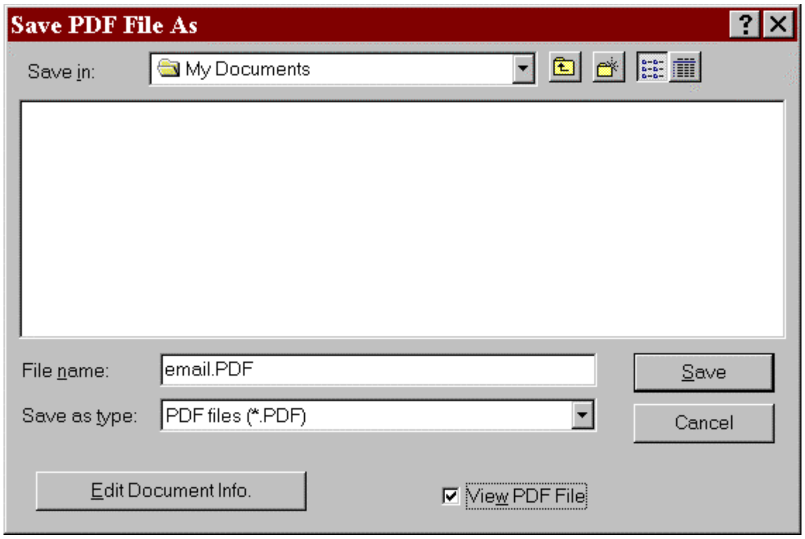
☞ In the Name: field, choose PDF Writer



Name: Acrobat PDFWriter
Status: Ready
Type: Acrobat PDFWriter
Where: LPT1:
Comment:
☐ Print to file
● All
○ Pages from: to:
○ Selection
Number of copies: 1
☑ Collate

☞ Click OK

☞ When prompted, name the file c:\My Documents\email.pdf (make sure to keep the View File box checked)


Save PDF File As
Save
Cancel
Edit Document Info.

Save in: My Documents

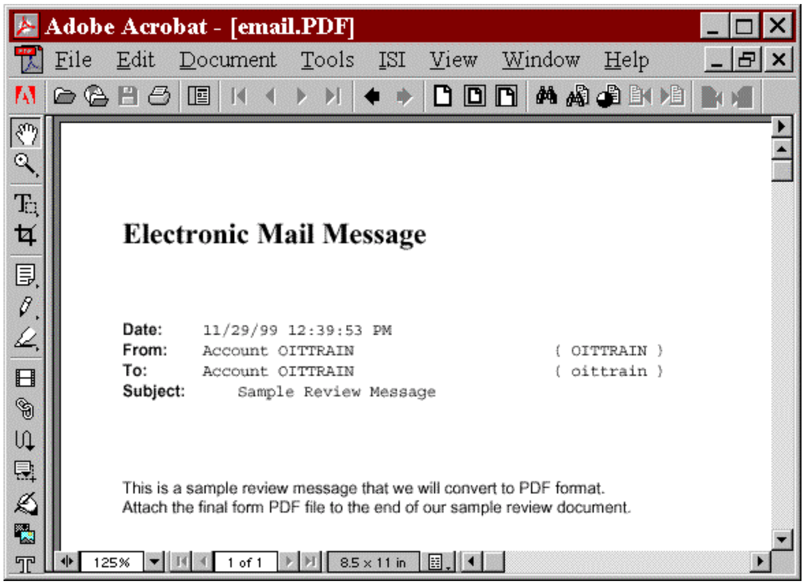
File name: email.PDF

Save as type: PDF files (*.PDF)

☑ View PDF File

- Click `Save`

Once the file is created, the PDF version will appear in the Adobe Acrobat document pane. One advantage of creating a PDF version of the e-mail is the e-mail message looks identical to a paper printout that save the date and time of the e-mail, as well as all recipient information.

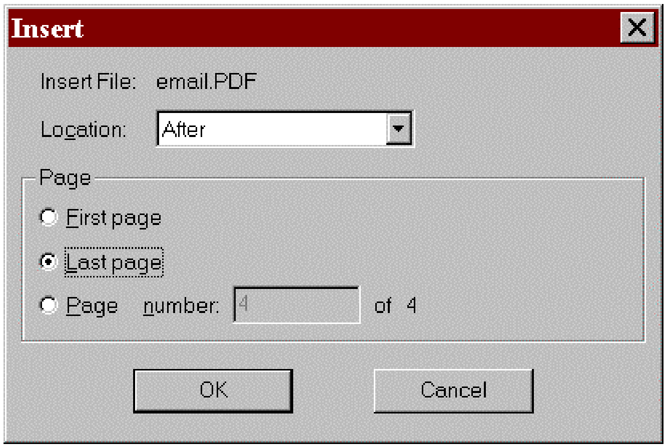

Adobe Acrobat - [email.PDF]
File
Edit
Document
Tools
ISI
View
Window
Help
125%
1 of 1
8.5 x 11 in

Electronic Mail Message

Date: 11/29/99 12:39:53 PM
From: Account OITTRAIN (OITTRAIN)
To: Account OITTRAIN (oittrain)
Subject: Sample Review Message

This is a sample review message that we will convert to PDF format.
Attach the final form PDF file to the end of our sample review document.

- Close the *email.pdf* file
- In our sample PDF review file, go to Document | Insert Pages on the Acrobat menu bar
- In the Select File to Insert window, select the c:\My Documents\email.pdf file we just created
- Click Open
- In the Insert window, choose `After` in the `Location:` field and check the `Last page` radio box to insert the e-mail at the end of the review document



Insert File: email.PDF

Location: After

○ First page

● Last page

○ Page number: 4 of 4

- Click `OK`

The *email.pdf* file is automatically inserted at the end of the document. You can add a new bookmark to the page using the procedures in the last topic. Make sure to save any changes in your PDF review file.

The Open feature in Adobe Acrobat can also be used to create new PDF files and add files to an existing PDF review document. See the Adobe Acrobat online help for complete instructions on creating PDF files.

Additional Tips

Use the following tips when creating your final review document:

- Remember PDF documents are intended to be final form. Drafts should not be checked into the Division Files System.
- Do not password protect your MS Word or PDF final form document. This may cause conflicts on the path from MS Word to DFS.
- Avoid adding annotations, audio annotations, stamps, file annotations, graphic markups, and text markups to your PDF final form document. They may increase your PDF file size and cause conflicts with DFS.
- USE TRUE TYPE FONTS!

Saving Your PDF Review File

Once you have completed reviewing the PDF document, you can close the file. The PDF final form document will remain in the folder you designated in the last chapter.

You are now ready to check your review document into the Division Files System!

Review

To test your knowledge of the topics covered in chapter 3, answer the following questions:

- What Word plug in is used to create PDF files?
- When should you use PDF Writer to create PDF files?
- When should you use Distiller to create PDF files?
- How do you display both the bookmarks and document in the PDF final form file?
- Where is a final form PDF review document archived?

Chapter 4 – Support

Now you are ready to go create final form PDF review documents. But what happens when you have a question or forget something covered in class? When should the Help Desk be called and what sort of information do you need to provide them to help find answer?

It is likely that a person who can find an answer to their question on their own **will not** have that same question again. This chapter covers how to find answers independently and how and when to access additional technical and peer support.

This short chapter will instruct you how to access the following types of support in the Center:

- Classes and Manuals
- Online Guide
- OIT Support
- Peer Support

This chapter will take about 20 minutes to complete.

Classes and Documentation

Class and Course Evaluation

The classes offered by OIT are dependent upon you to make constructive insights and comments about the courses. Please make sure to fill out the OIT Course Evaluation at the end of class. These evaluations will help us shape the classed so they are most beneficial to center staff.

Manual

The course manual can be found on the OIT Web in the training section.

Microsoft Word Classes

It is recommended that you attend, or know the concepts covered in, OIT's Introduction to Microsoft Word 97 and Formatting in Microsoft Word 97 classes. In-depth instruction is provided in these courses on the formatting tools touched upon in this class.

ERSR Classes

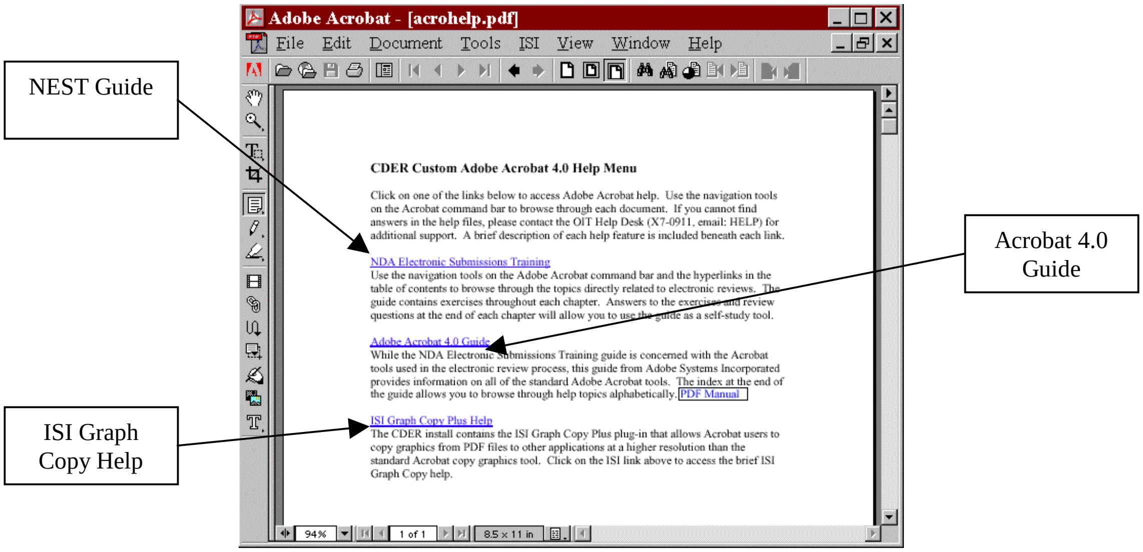
In addition to this course, OIT offers the NDA Electronic Submissions Training (NEST) and NDA Electronic Data Analysis (NEDAT) courses as part of the Electronic Regulatory Submission and Review training provided by OIT. The NEST course provides additional training in Adobe Acrobat 4.0 and PDF. The NEST manual can be found in the `Help` section under the Acrobat 4.0 menu bar.

Online Guides

Creating PDF Review Documents introduces CDER staff to features available in Adobe Acrobat 4.0. Additional information on the features discussed in this course, as well as Acrobat features not covered in this manual, can be found in the online guides.

To access the online guides:

☞ Go to `Help` | `Acrobat Guide` on the menu bar


NEST Guide
Acrobat 4.0 Guide
ISI Graph Copy Help
Adobe Acrobat - [acrohelp.pdf]
File Edit Document Tools ISI View Window Help
94%
1 of 1
8.5 x 11 in

CDER Custom Adobe Acrobat 4.0 Help Menu

Click on one of the links below to access Adobe Acrobat help. Use the navigation tools on the Acrobat command bar to browse through each document. If you cannot find answers in the help files, please contact the OIT Help Desk (X7-0911, email: HELP) for additional support. A brief description of each help feature is included beneath each link.

NDA Electronic Submissions Training
Use the navigation tools on the Adobe Acrobat command bar and the hyperlinks in the table of contents to browse through the topics directly related to electronic reviews. The guide contains exercises throughout each chapter. Answers to the exercises and review questions at the end of each chapter will allow you to use the guide as a self-study tool.

Adobe Acrobat 4.0 Guide
While the NDA Electronic Submissions Training guide is concerned with the Acrobat tools used in the electronic review process, this guide from Adobe Systems Incorporated provides information on all of the standard Adobe Acrobat tools. The index at the end of the guide allows you to browse through help topics alphabetically. PDF Manual

ISI Graph Copy Plus Help
The CDER install contains the ISI Graph Copy Plus plug-in that allows Acrobat users to copy graphics from PDF files to other applications at a higher resolution than the standard Acrobat copy graphics tool. Click on the ISI link above to access the brief ISI Graph Copy help.

☞ The CDER Customer menu will appear. Click on one of the guides to access help:

NDA Electronic Submissions Training - Use the navigation tools on the Adobe Acrobat command bar and the hyperlinks in the table of contents to browse through the topics directly related to electronic reviews. The guide contains exercises throughout each chapter. Answers to the exercises and review questions at the end of each chapter will allow you to use the guide as a self-study tool.

Adobe Acrobat 4.0 Guide - While the NDA Electronic Submissions Training guide is concerned with the Acrobat tools used in the electronic review process, this guide from Adobe Systems Incorporated provides information on all of the standard Adobe Acrobat tools. Since this course only covered one way to create PDF files, use the Acrobat guide to discover all of the PDF creation procedures available. The index at the end of the guide allows you to browse through help topics alphabetically.

ISI Graph Copy Plus Help - The CDER install contains the ISI Graph Copy Plus plug-in that allows Acrobat users to copy graphics from PDF files to other applications at a higher resolution than the standard Acrobat copy graphics tool. Click on the ISI link to access the brief ISI Graph Copy help.

OIT Support

If you are unable to find the answers you need via class instruction, manuals, or the online guides, please call the Help Desk at X7-0911 or e-mail them at HELP.

Peer Support

Some of the best resources for learning are those who work with us every day. Those of you who have taken this course and have a firm grasp of the PDF creation process can help share your expertise with others by acting as a mentor to those seeking information and feedback to their ERSR related situations. Look for a more formalized peer support system, as more center staff become familiar with ERSR regulations.