

# PDFs: More Than You Thought Possible

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## Introduction

Since their introduction over two decade ago, PDF files have ascended to the forefront of document storage and archiving and now serve as the *de facto* standard in most of the document management systems used by accountants and finance professionals. The reasons for this are many, but are centered around the fact that PDF documents are hardware, software, and operating system independent – that is, a user can read and work with a PDF file regardless of the type of computer or operating system in use. What many do not understand is that PDF files also serve many purposes other than just a means of storing documents. From fill-in forms to a mechanism for document review and collaboration to a foundation for multimedia documents, the capabilities of PDF files are much greater than many think possible. In this article, we examine some of the lesser-known possibilities of working with PDF documents.

## Collaborating with PDFs

One of the pervasive myths related to PDFs is that users cannot change the information inside the document. In fact, PDFs are, by default, unsecured documents and, accordingly, users can alter them in any number of ways. This ability to edit PDF files is exactly what makes PDFs an ideal tool for collaborating with others.

One means of collaborating with PDFs involves sending the PDF to others via email for commenting and markup. To do so, in Adobe Acrobat Standard or higher, select the **Comments** menu and choose **Attach for Email Review**. Next, specify the email addresses of the recipients and send the file. This method allows you to track the comments made by others and incorporate these comments back into the original document.

Another very easy way to collaborate on PDFs is to use Adobe's free **Acrobat.com** service as the means for distributing documents to others. With Acrobat.com, users upload the document securely to an Adobe server and provide invitations for others to edit and markup the document on the server. Two advantages of using Acrobat.com instead of the email-based review process include:

- 1) You can easily track who has commented on the document and send reminders to those that have not responded, and
- 2) Every reviewer of the document can see the comments and edits suggested by all other users.

The ability to collaborate on PDF documents is a key feature for accountants using PDFs in preparing tax returns. For example, working papers related to the tax return could be scanned/converted/saved as a

PDF and then routed to the appropriate team member for review and approval. Staff members can easily clear review notes inside the PDF and the PDF file maintains a thorough record of all notes and their disposition.

## Using PDFs to Collect Data

Virtually all businesses use forms as tools for collecting and summarizing information. Purchase orders, invoices, tax documents, and employment applications are all examples of commonly used forms. In some cases, these forms are preprinted, and users manually input data; in other cases, software applications – accounting applications, for example – generate these forms, and users print or store them for future recall. However, in an increasing number of cases, PDF documents are the foundation of these forms.

Among the many advantages of using PDF files as the basis for forms are:

- PDF forms can be created and distributed for virtually zero out-of-pocket costs to most organizations;
- PDF forms support "green" initiatives by reducing paper consumption;
- Users can construct PDF forms easily from existing electronic documents and paper-based forms, as well as from scratch;
- PDF forms are easy to distribute via servers, e-mail, or web-based delivery methods;
- PDF forms are relatively easy to secure;
- Numerous options exist for collecting and managing information entered into PDF forms; and
- Users can import data collected via PDF forms into many software applications.

Though users of Adobe Acrobat Reader can fill-in existing PDF forms, creating forms requires Adobe Acrobat Standard or higher, or PDF software of similar capability available from other companies. If using Acrobat Standard or higher, users can create forms in one of three ways:

- 1) **From an existing electronic document.** To create a form from an existing electronic document, including a Microsoft Office Word document, select the **Form Wizard** from the **Forms** menu and choose **An existing electronic document**. Acrobat will “read” your existing document and convert it into a fill-in PDF form. Though some minor touch-up may be necessary for the final product, in most cases Acrobat does a remarkably good job of converting the document into a form and recognizing all of the fields.
- 2) **From an existing paper document.** Choose **A paper form** from the Form Wizard to convert an existing paper form into a fill-in PDF form. During this process, Acrobat prompts you to scan your existing paper form; upon scanning the paper form, Acrobat will convert the document into a fill-in PDF form, similar in fashion to the process described for converting an existing electronic document.

- 3) **From scratch or from a template.** If the form you wish to create does not already exist in some fashions, choose **No existing form** from the Form Wizard. Choosing this option allows you to create form from “scratch” or from a predefined template in Acrobat.

Regardless of the method used to create a form, most users will find the process of creating forms, distributing them, and collecting data to be surprisingly easy and efficient.

## Working with Multimedia in PDFs

Users can easily add multimedia content – such as video and sound clips – to PDF files. Doing so will help to engage the reader of the PDF document and to ensure that your intended message is both heard and understood. To add a multimedia object, choose **Tools, Multimedia** and then the type of object you will add – **3D, Flash, Sound, or Video**. Next, click and drag on the PDF to select where you want the multimedia object to appear. Then browse to the file you wish to add or enter the URL that points to the location of streaming media you wish to play inside the PDF.

When adding multimedia to a PDF document, users can access a series of Advanced Options that provide choices for greater control over how the multimedia will appear and playback inside the PDF. Included in these options are how the reader will start and stop the playback, the appearance of the multimedia within the PDF, and whether controls for items such as Play, Rewind, and Pause will be visible in the playback window.

As with the collaboration and forms capabilities discussed above, adding multimedia to PDF documents is surprisingly easy, even for novice users, and offers tremendous potential to enhance the effectiveness of your PDF-based communications.

## Summary

PDF files are clearly in the mainstream of technology used by accountants and other finance professionals. Yet, many everyday users of PDFs view them only as a means of storing and archiving documents. As discussed in this article, the capabilities of PDF documents extend far beyond saving documents for future recall. Put the real power behind PDFs to work for you today by taking advantage of the features discussed in this article along with many of the other advanced capabilities of PDFs. You will be much more productive for doing so!

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