

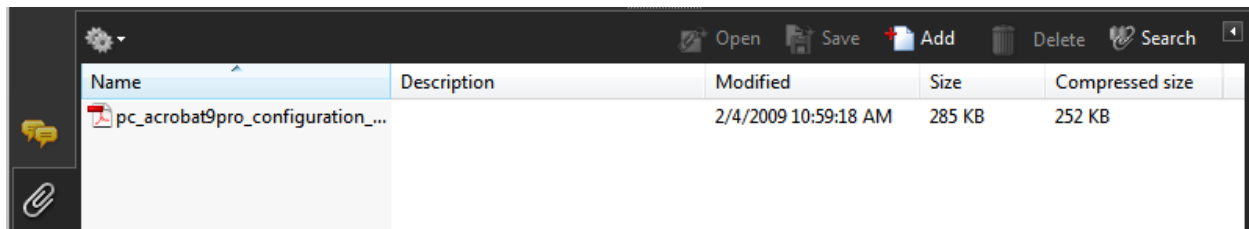
PDF Creation Checklist

for NREL Standard PDFs Using Windows, Microsoft Office 2007 and Adobe Acrobat 9 Professional

Acrobat 9 Professional Configuration

The attached configuration documentation contains one-time instructions to load NREL-approved job settings files and to configure the Adobe PDF printer driver and Acrobat 9 Professional to create PDFs which meet requirements for posting on the Web. *Some of the steps outlined in this documentation will require the user to have local administrative rights to their computer.*

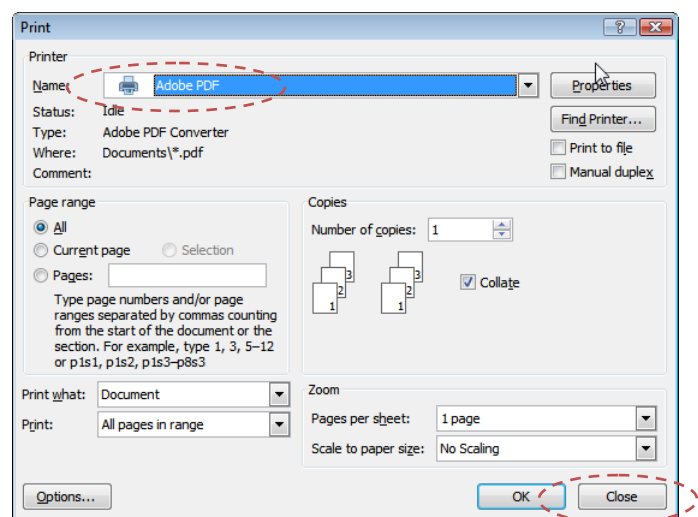
To access the attachment, click on the **Attachments tab** (paper clip icon) at the bottom-left of the navigation pane and the attachments pane will appear below this document.



Click the **Open** button to view the configuration document and load the approved job settings files.

Create PDF from Microsoft Office Applications

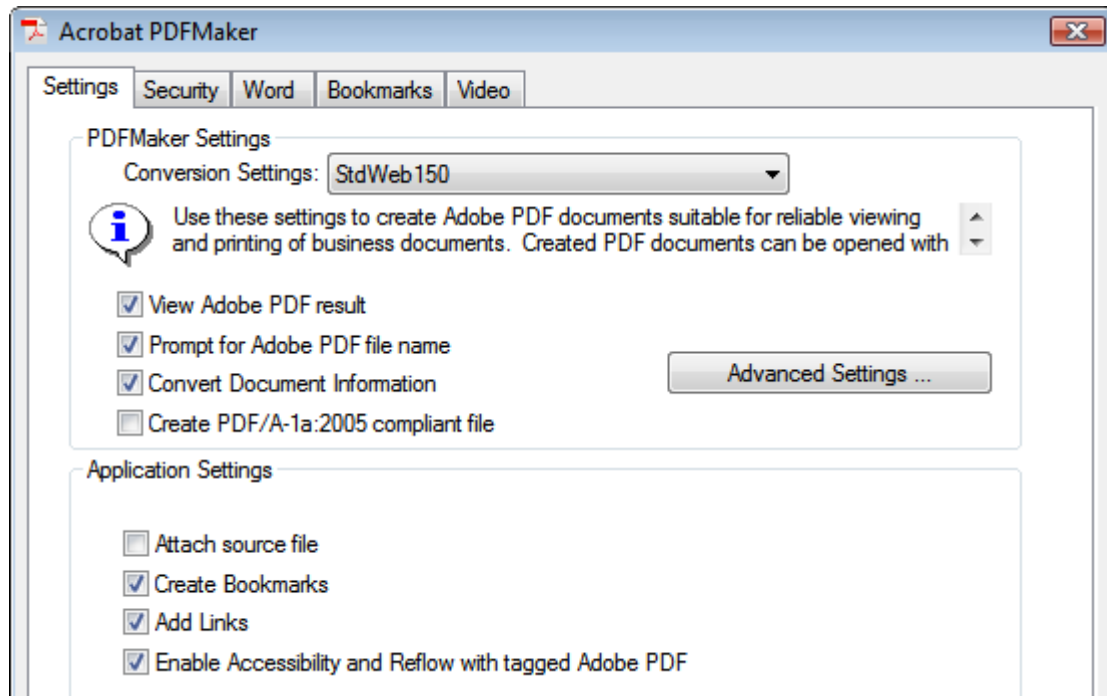
- ☐ Make sure to **select Adobe PDF as your printer** so that your document will be formatted for postscript PDF creation.
 - Though you can create a PDF without selecting Adobe PDF as your printer, the document will reflow based on the printer you have selected and you will not get consistent results.
- ☐ The Cancel button in the print dialog box changes to a Close button whenever you change a printer. Be sure to **click Close** after selecting Adobe PDF printer instead of OK or else the document will start to print through Adobe PDF printer instead of PDFMaker.
 - PDF creation through PDFMaker allows you to retain all interactive elements (bookmarks, links, etc.) that you have selected in your PDFMaker settings.
 - Interactive elements cannot be carried-thru when printing through Adobe PDF printer.



- ❑ **Select Acrobat** from the ribbon menu, and **click on the Preferences** button. These preferences control how the PDF is created and what functionality is added to them when you click the Create PDF button. These are “sticky” settings, meaning that anything you select here will stay until you change it again.

Settings Tab

- Select StdWeb72, StdWeb150, or StdPrint
- Select Prompt for Adobe PDF file name
- Select Add links or Add bookmarks if desired
- Select Enable Accessibility and Reflow with Tagged Adobe PDF



Security Tab – leave everything unchecked.

Word Tab - Select only options desired in resulting PDF. Selecting options that are not pertinent to your document unnecessarily slows PDF creation time.

Bookmarks Tab - If styles and headings were used in the document, select appropriate levels of automatic bookmark generation as desired.

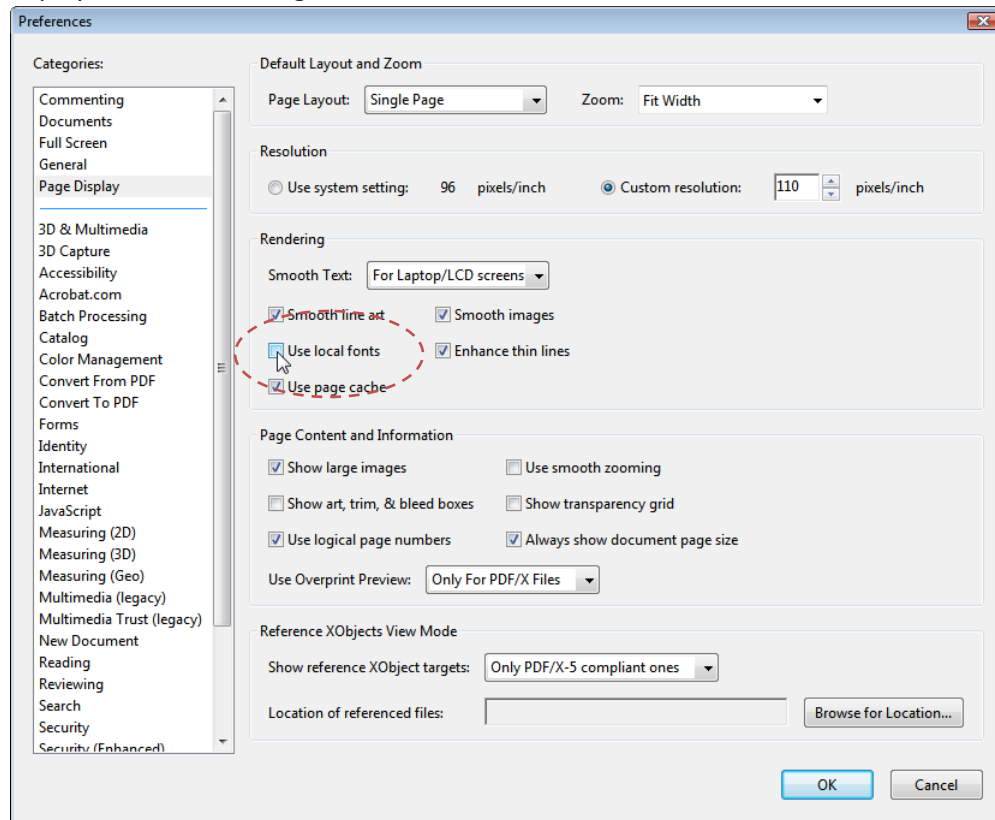
Excel and PowerPoint - Slightly different tabs and options, select as appropriate

- ❑ Click the PDFMaker **Create PDF** button.
- ❑ **Save** the file.

Finalize PDF to NREL Standards

- ❑ First and foremost—Carefully **PROOF** the PDF!
 - Choose File >Document Properties >Fonts to verify that all **fonts are Embedded** or Subset.
 - Times/Times New Roman, Arial/Helvetica, Courier or Symbol fonts are considered 'Base 14' fonts. These fonts generally fare well with Adobe's font substitution.
 - Avoid subsetting when merging multiple PDFs together.

- If all fonts are not embedded, then be sure to inspect for substitution impacts such as garbled/missing characters, or boxes for symbols. In Acrobat, choose **Edit > Preferences > General**. Under **Categories**, select **Page Display** and then **deselect 'Use Local Fonts'**. If a font cannot be substituted, the text appears as bullets, and Acrobat displays an error message.



- Scroll through and LOOK at every page. Look for missing items from charts such as legends and axis titles which sometimes disappear due to layering inconsistencies generated by the tagging process.
- Look for PDF distortions, such as patterns and shading that differ from the native file; the pattern differences may affect the content intent.
- Look for slow-loading graphics – usually a raster image with a transparent background and excessive scaling, or a chart with complex blends or patterns.
- Links to different drives will default to absolute links...make sure files reside on same network drives.
- Select the Link tool and verify that all link boxes are in the appropriate places. Verify that link urls and files are valid.
- Verify that bookmarks are valid and meaningful.
- ❑ Open the Pages panel and choose of these:
 - **Embed All Page Thumbnails** for documents that open to Pages Panel and Page, or
 - **Create Bookmarks** (if not done during PDF creation) for larger documents that **exceed 16 pages or that contain a Table of Contents**, such as technical papers and research reports. Do not embed thumbnails for documents that open to Bookmarks Panel and Page.
- ❑ Set Document Properties - **Initial View**
 - Set Initial View to either **Pages Panel and Page** or **Bookmarks Panel and Page**
 - **Bookmarks Panel and Page** for documents that exceed 16 pages and/or have a Table of Contents
 - **Pages Panel and Page** for documents under 16 pages.

- Set Magnification to **Fit Page** if document has a Cover or is a screen-sized presentation.
- Set Magnification to **Fit Width** for all other documents
- Set Page Layout to **Single Page**
- ❑ Set a **Page Action** if the document's first page is a Cover
 - **Page Open** action = Fit Page
 - **Page Close** action = Fit Width
- ❑ **Enter Meta field information** into the Document Summary window
 - Enter **Title** exactly as it appears on the document
 - Enter in the **Subject** field a summarized description of the document contents, not to exceed 200 characters.
 - Optional meta fields
 - Author field – Remove the PDF creator's name if it was entered by default.
 - Keyword field – Fewer keywords are better. Separate keywords with semi-colons.
- ❑ **If not already tagged**, use the **Add Tags to document** function for Section 508 compliance
 - **Save a copy** of the untagged PDF prior to using this function as changes are irreversible.
 - Select **Advanced>Accessibility>Add Tags to document**.
 - If the procedure completes without an error, carefully review the PDF again for any new anomalies occurring from the process.
 - Possible errors include corrupt layer order on graphics and charts, so elements appear to be missing or covered by something else.
 - If there are anomalies which you are unable to repair or if the process produces an error screen, **Revert** back to the saved PDF.
- ❑ Finally, always do a **Save As** on your final PDF to do file optimization and re-enable Fast Web view.