

## Overview of PDF Bookmarks

### Quick Tips:

-PDF Bookmarks: Bookmarks are used in Adobe Acrobat to link a particular page or section of a PDF file. They allow you to quickly jump to that portion of the document by clicking on the linked phrase.

-Adobe Reader does NOT create Bookmarks! Reader will only view PDF files. You can NOT edit or create a PDF using Reader.

- Adobe Acrobat Pro and Acrobat DC are available for download on the web or purchase at the store. **Always** check the system requirements and your computer before downloading and installing software to make sure that it is compatible with your system.

-There is variance in the fee structure due to the difference in the versions of the software and options to purchase to use it monthly or purchase the entire program. The cost is anywhere from \$9.99/month to \$298-\$499 for the entire program.

-Be sure to check our website, <http://www.nursecredentialing.org/Accreditation/Primary> for templates and guidelines on the self-study and activity files.

-You can use Links instead of Bookmarks, if you know how to use them.

-If you are creating a PDF file from a SCANNED document, it will be an OCR Text document, instructions for that are not provided.

-Renaming a Bookmark: Click on the Bookmark on the left menu to highlight the words and type in the new name.

-Double check the content to make sure everything is included before submitting your documents to us!

-For directions on how to create Bookmarks with the new Acrobat DC, please view these links:

<https://acrobatusers.com/tutorials/how-to-create-and-add-bookmarks-using-acrobat-dc>

<https://www.youtube.com/watch?v=L9cOsG3WRRQ>

Note: These directions may vary with other versions of Adobe Acrobat!

## How to “Create a PDF” Bookmarked Document

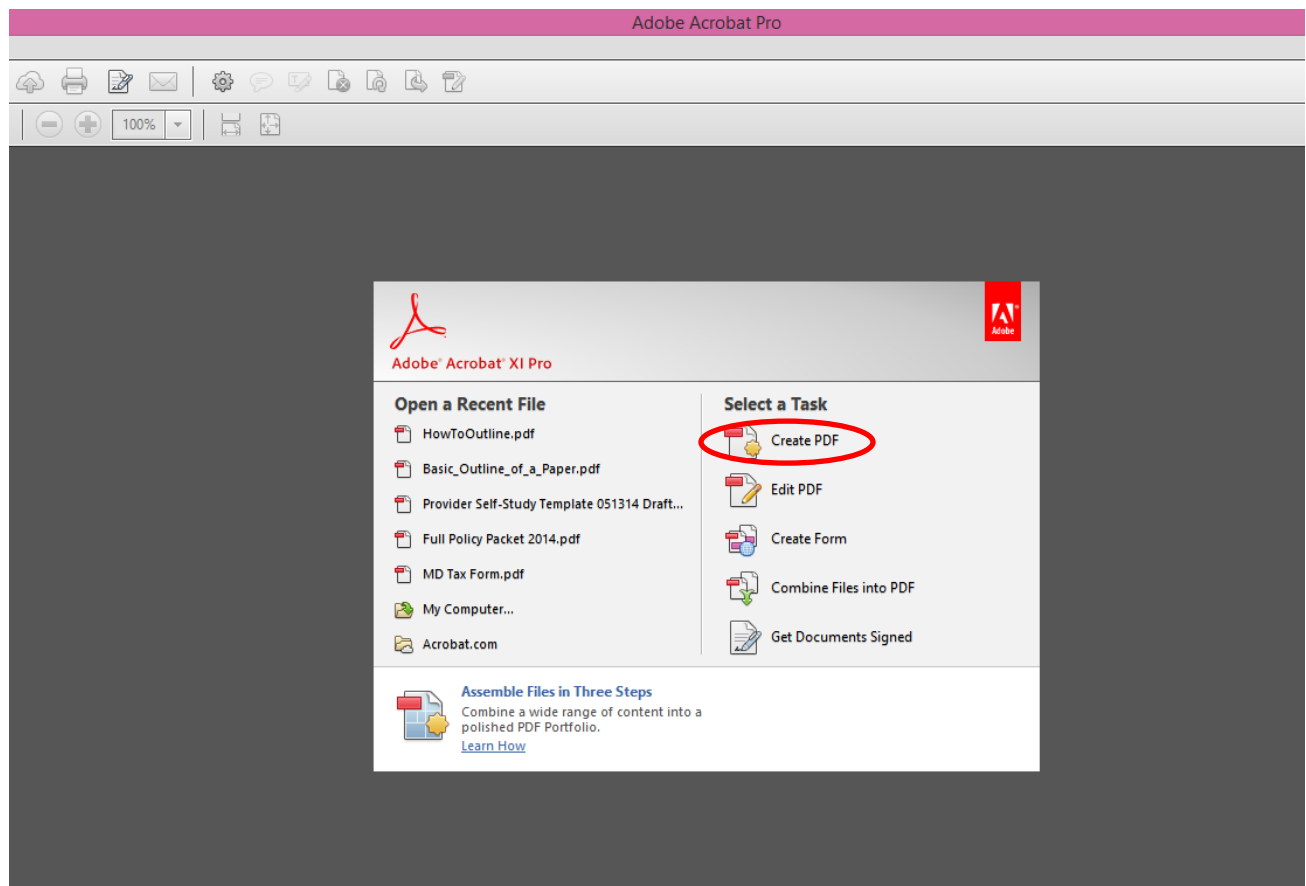
### **Step 1:** Create Word Document.

Create your file in Word. Save your document in Word, move on to the next step when you have finished editing all text and checked spelling, grammar, etc. You cannot edit the text once you have imported the document into Adobe.

### **Step 2:** Open your Word version in Adobe Acrobat Pro.

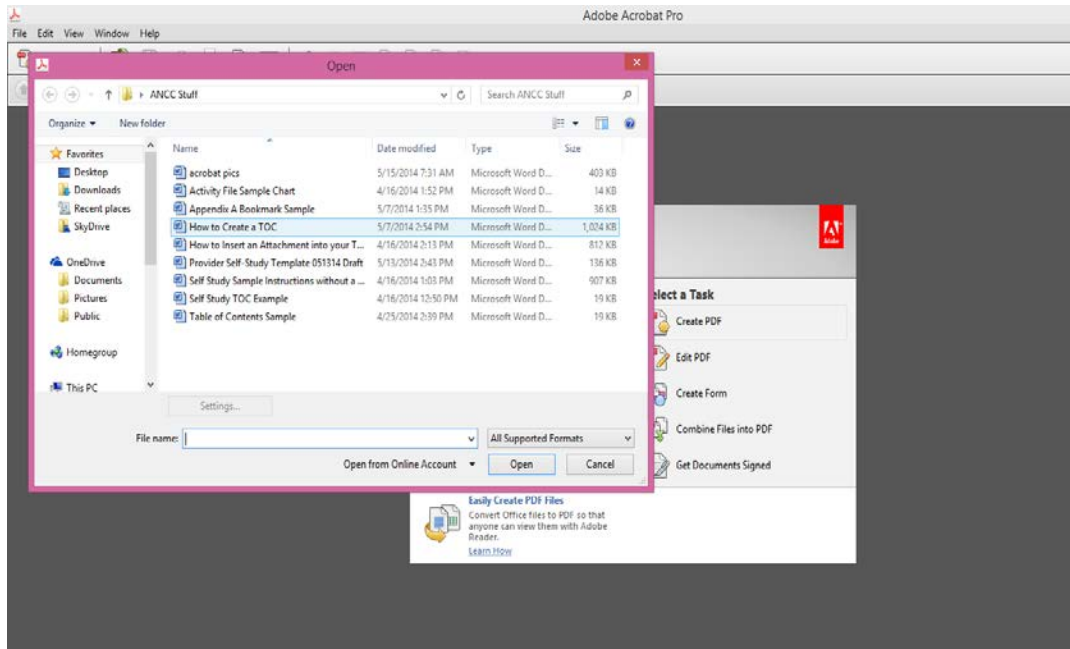
Open Adobe Acrobat. Below is a screen shot of the Home Page. On the left is a list of documents that you have previously opened or created (recent files). On the right are your task options. You will need to click on “Create a PDF” (top right) to start a document.

Shot 1:



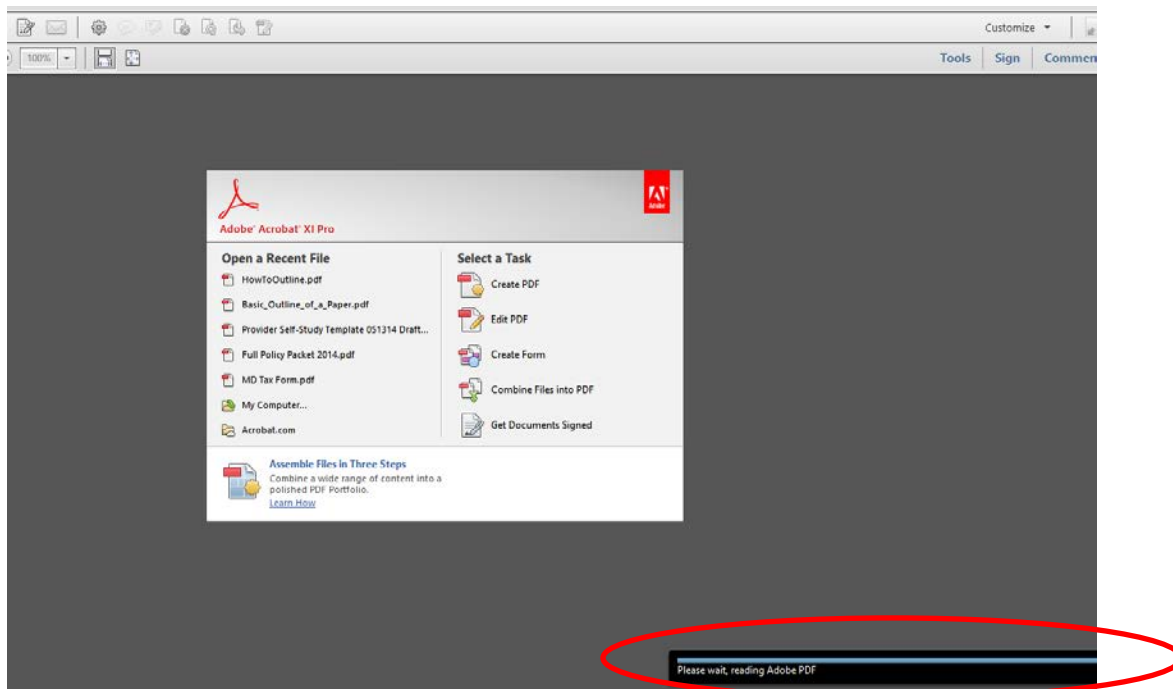
**Step 3:** After you select “Create a PDF,” it will have you select which document that you will be using. Select the file and “Open.”

Shot 2:



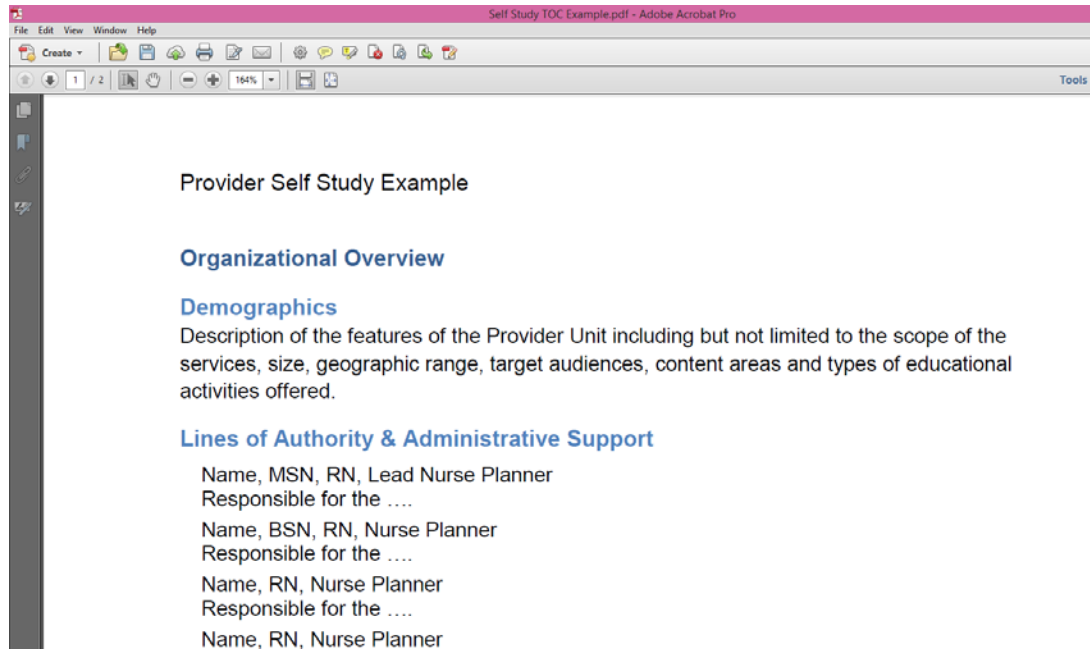
Adobe will take you back to the home page but a black bar will appear at the bottom and show you that it is processing the files.

Shot 3:



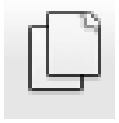
**Step 4:** Adobe will now display your file as a PDF bookmarked document. (My Example File)

Shot 4:

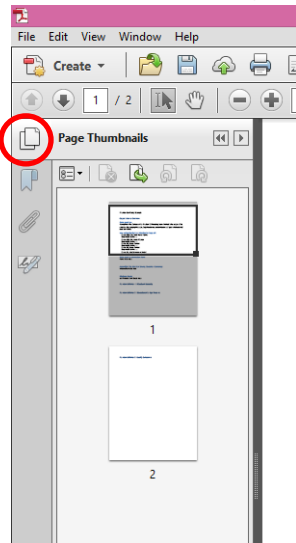


## Overview of Navigation Icons

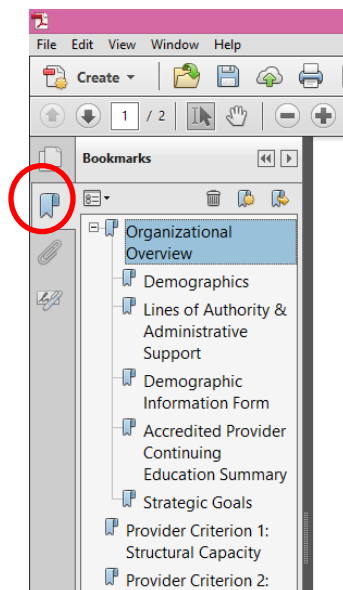
On the left side of Shot 4 above, you will see a series of icons, these are the navigation icons for your document.



The “Page” icon will show you thumbnails of each page of your document.

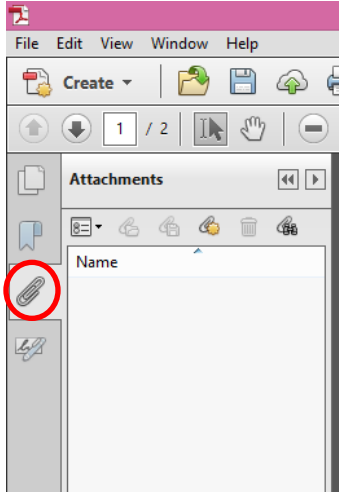


The “Scroll” icon will show you all of your bookmarks and where they are in your document.

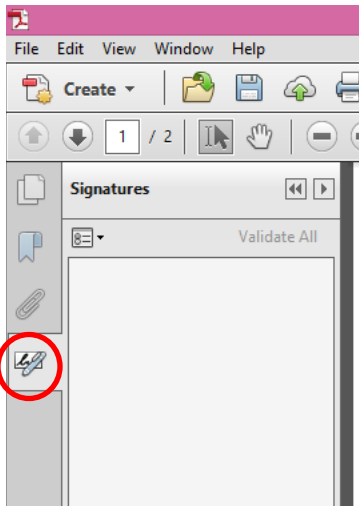




The “Paper Clip” icon is the attachment menu and will allow you to attach supporting documents.



The “Pen” icon is to verify signatures on the document.



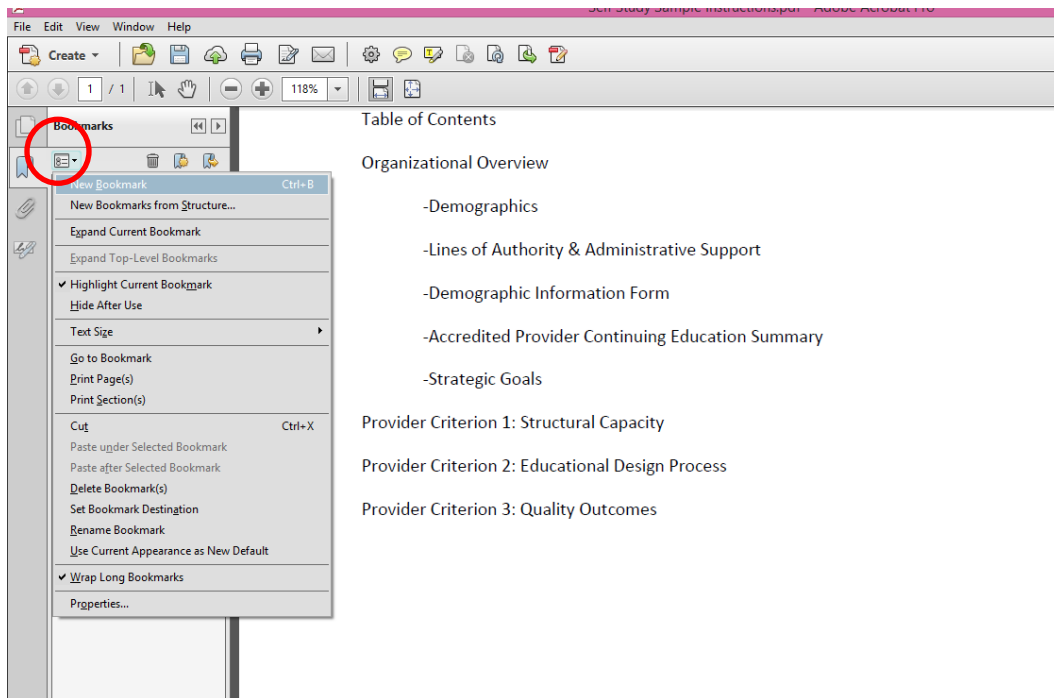
## How to Create a New Bookmark

If you find that you would like to add in another bookmark that was not already created, these are the steps for that.



**Step 1:** On the left, Click on the “Scroll” Icon, which open the Bookmarks Navigation pane.

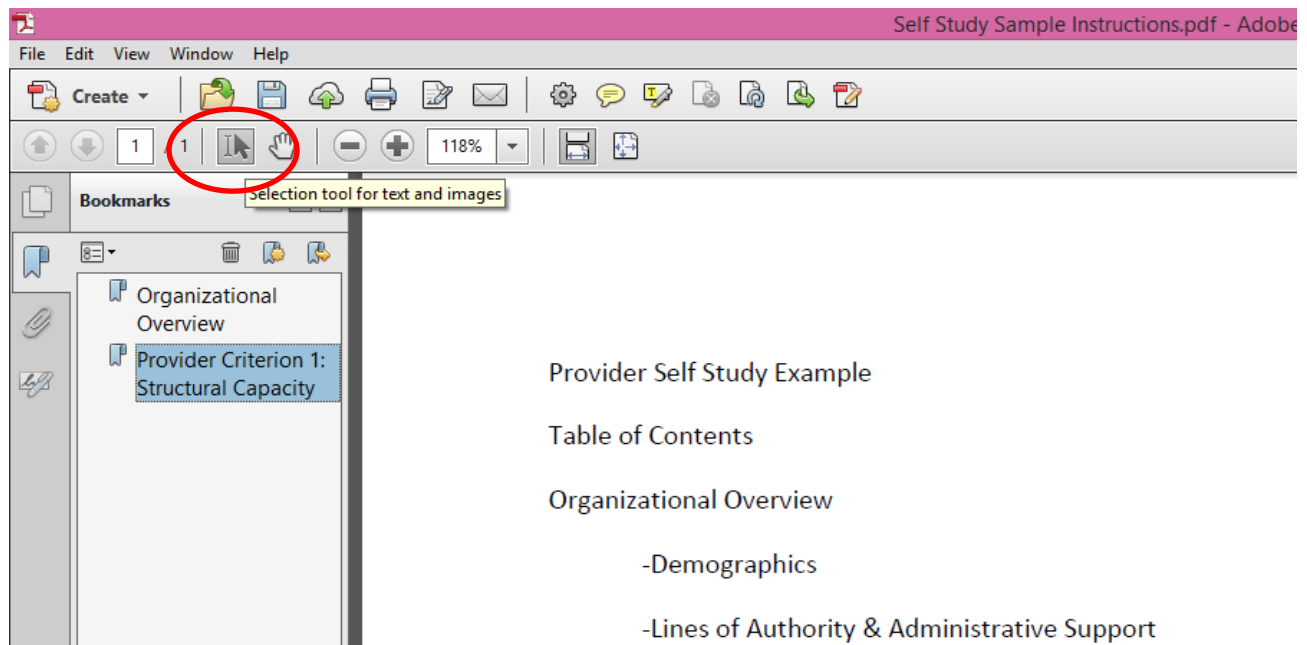
Shot 1: Bookmarks Navigation Pane.



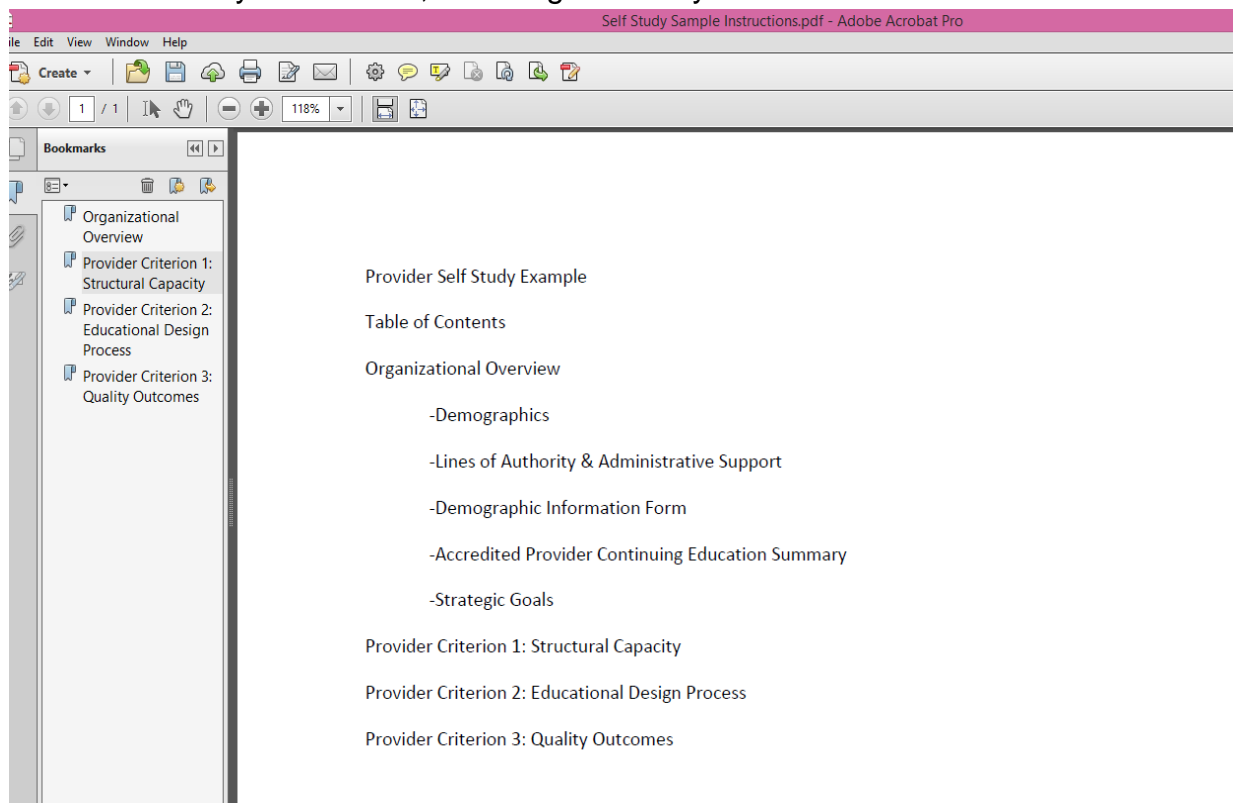
**Step 2:** Find the text in the document that you wish to make a bookmark.

**Step 3:** Using the Text Select Tool from the Acrobat toolbar (The arrow above and to the right of the bookmarks toolbar), highlight/select the text with your mouse that you wish to use for the bookmark label. The highlighted text currently selected in the document is used as the Bookmark's label. If no text has been highlighted, type the text for the bookmark label, and press Enter. (Bookmark labels can be up to 128 characters long.)

Shot 2: Use the Selection Text Tool to highlight text to create the next bookmark. Select New Bookmark from the drop down of options. Repeat until all Bookmarks are created.



Shot 3: All of my Bookmarks, including the newly created ones.



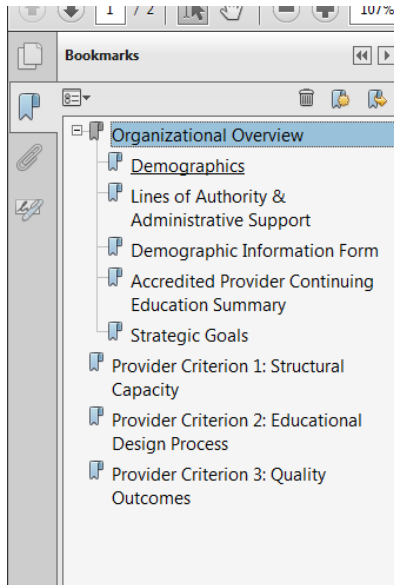


## Nesting Bookmarks

You can nest/indent a list of bookmarks to show a relationship between topics. Nesting creates a parent/child relationship. You can expand and collapse this hierarchical list as desired. (This is NOT required)

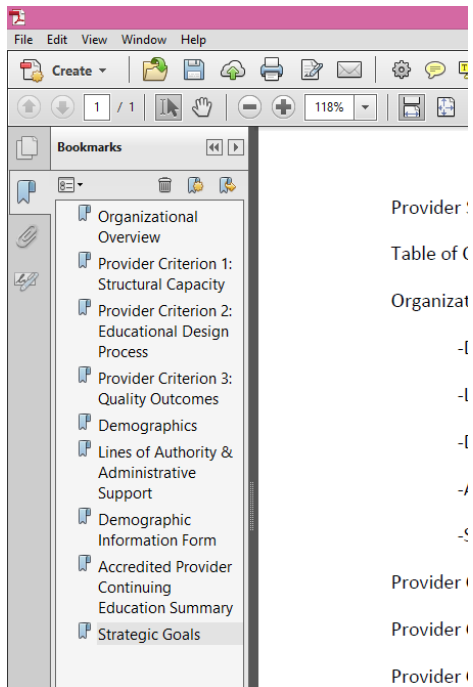
**Remember: The nested pages must be bookmarks first to do this!**

Here is what the final product will look like:

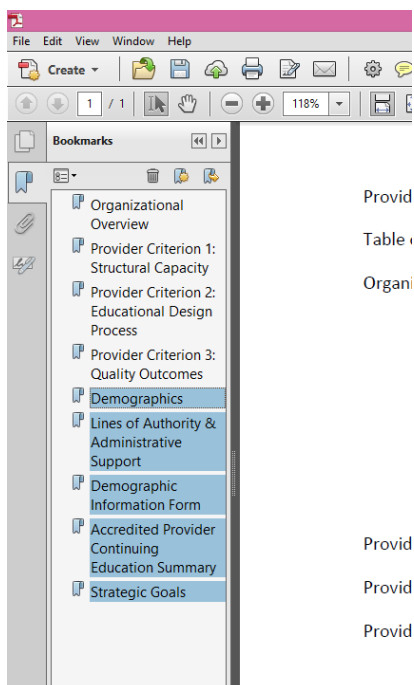


When you are finished, you should be able to jump from page to page throughout the document still with the document in order. Follow the steps below to nest one or more bookmarks under another bookmark:

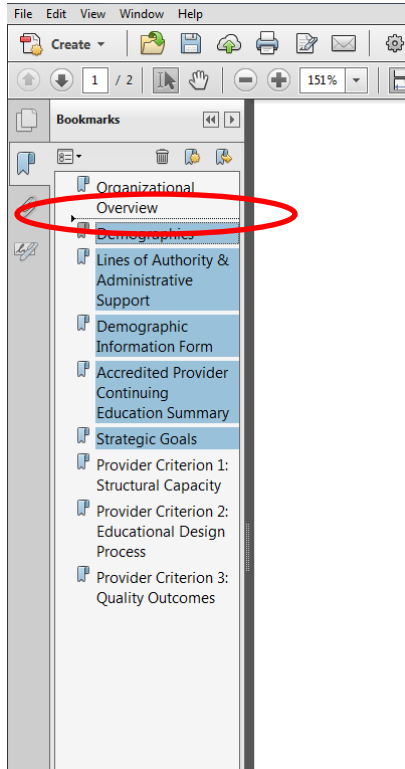
**Step 1:** First, I made all of my soon to be nested pages Bookmarks, as you can see in the Navigation pane on the left.



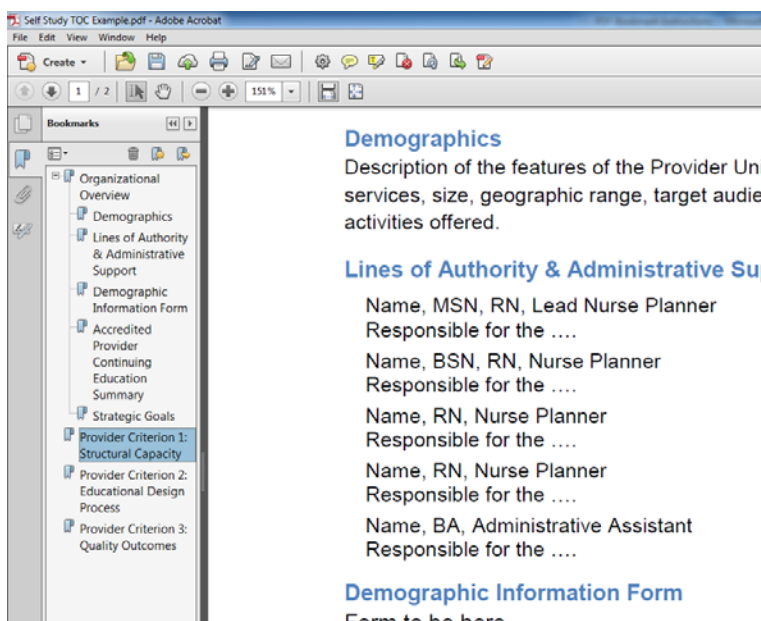
**Step 2:** Select/highlight the bookmark or range of bookmarks you want to nest (click the first bookmark, hold down the shift key or Ctrl key and click the last bookmarks in the series). Below, I have highlighted all of the bookmarks that I will be moving to be sub-headed under “Organizational Overview.”



**Step 3:** Drag the highlighted bookmarks underneath what will become the parent bookmark or chapter heading. A line with a black triangle on the left will appear that shows where the bookmarks are being moved to. See the Navigation pane in the picture below.

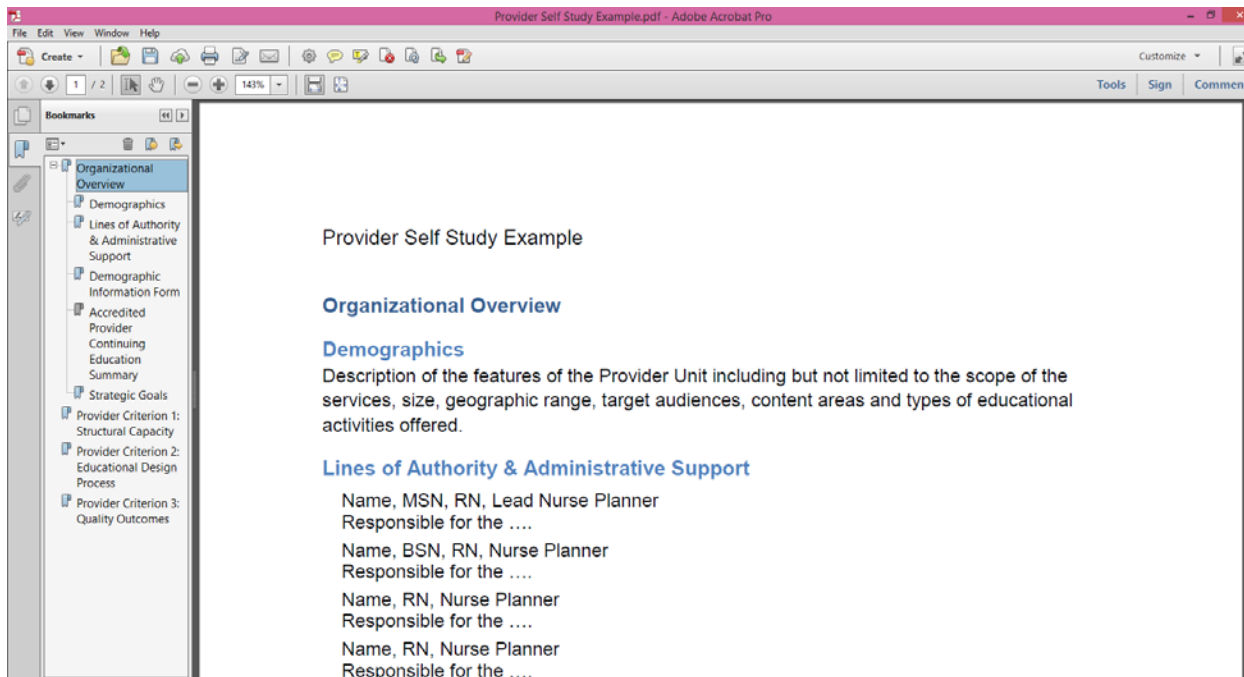


**Step 4:** Release your mouse and the bookmarks will be moved. Note: The actual pages will remain in their original location in the document.

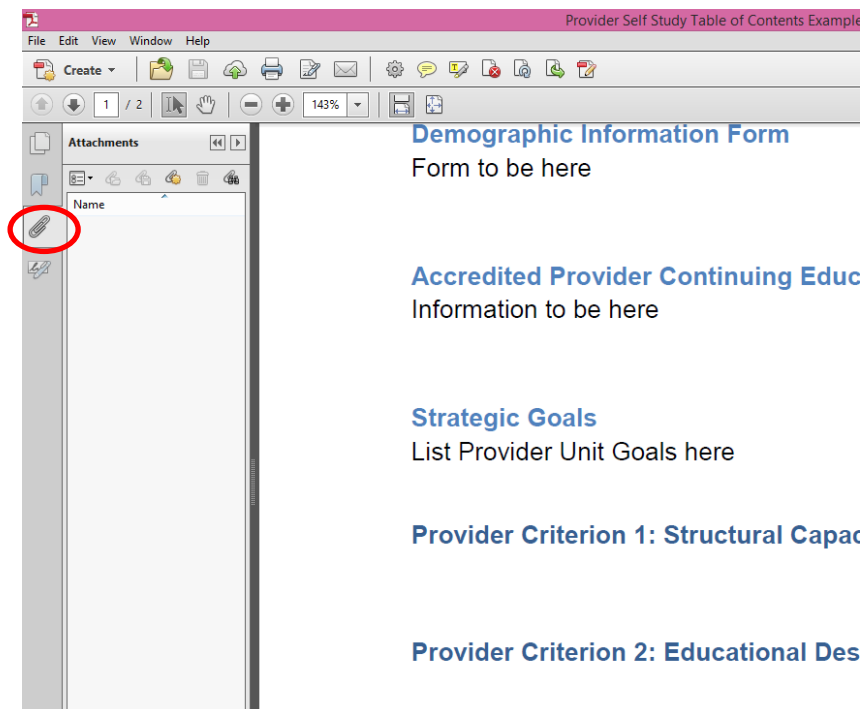


# How to Insert an Attachment into your PDF

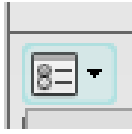
**Step 1:** Open your File in Adobe Acrobat.



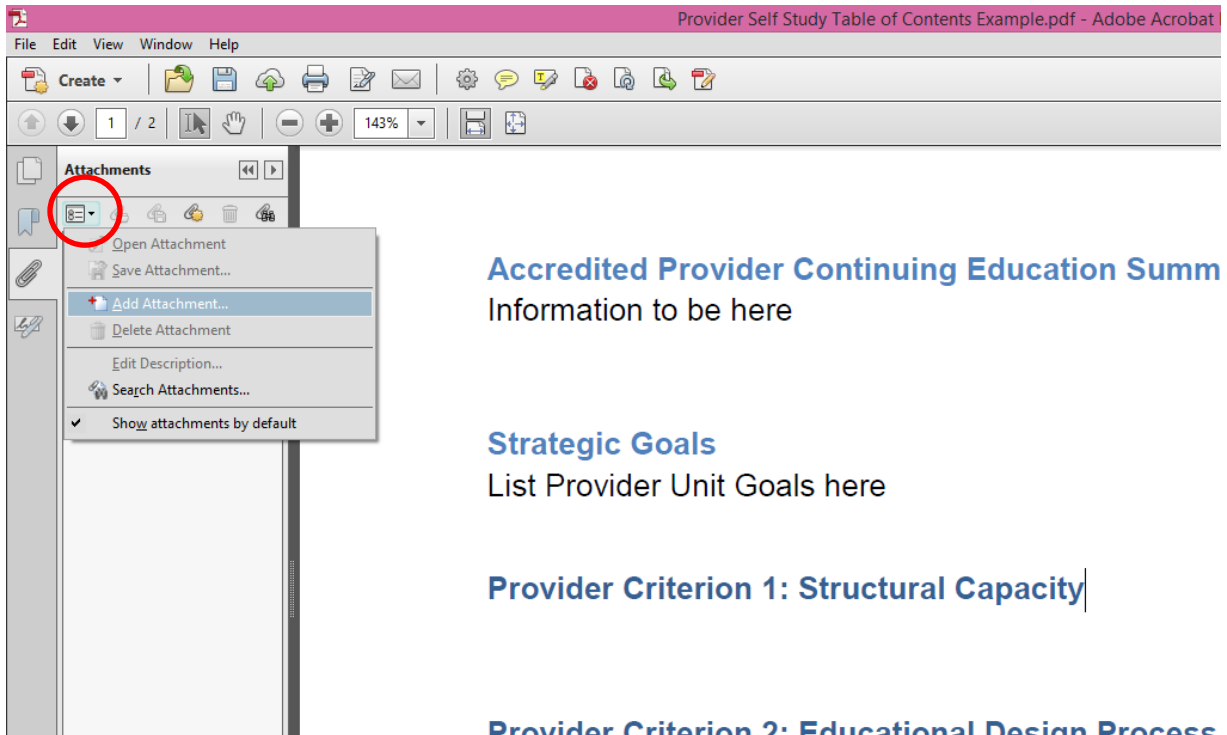
**Step 2:** On the left, click on the “Paper Clip”  icon to display the attachment menu.



**Step 3:** Click on the box icon to display the attachment drop down menu.



Select Add Attachment.



The screenshot shows the Adobe Acrobat interface. The title bar reads "Provider Self Study Table of Contents Example.pdf - Adobe Acrobat". The menu bar includes "File", "Edit", "View", "Window", and "Help". The toolbar contains various icons for document manipulation. The "Attachments" panel is open on the left, showing a list of attachments. The "Add Attachment..." option is highlighted in blue. The main content area displays the following text:

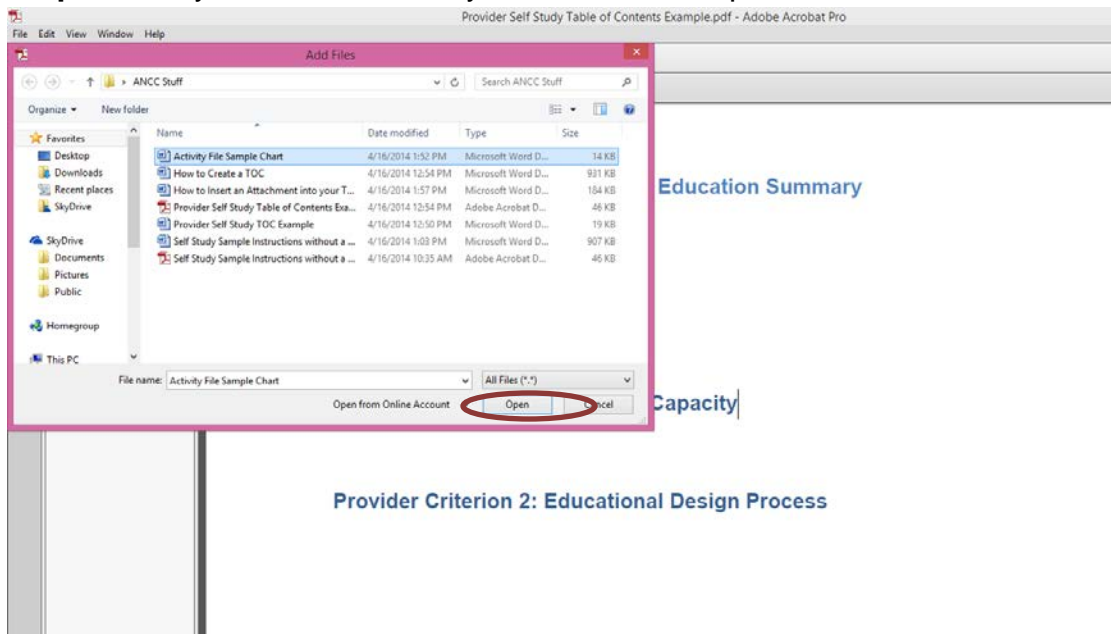
**Accredited Provider Continuing Education Summ**  
Information to be here

**Strategic Goals**  
List Provider Unit Goals here

**Provider Criterion 1: Structural Capacity**

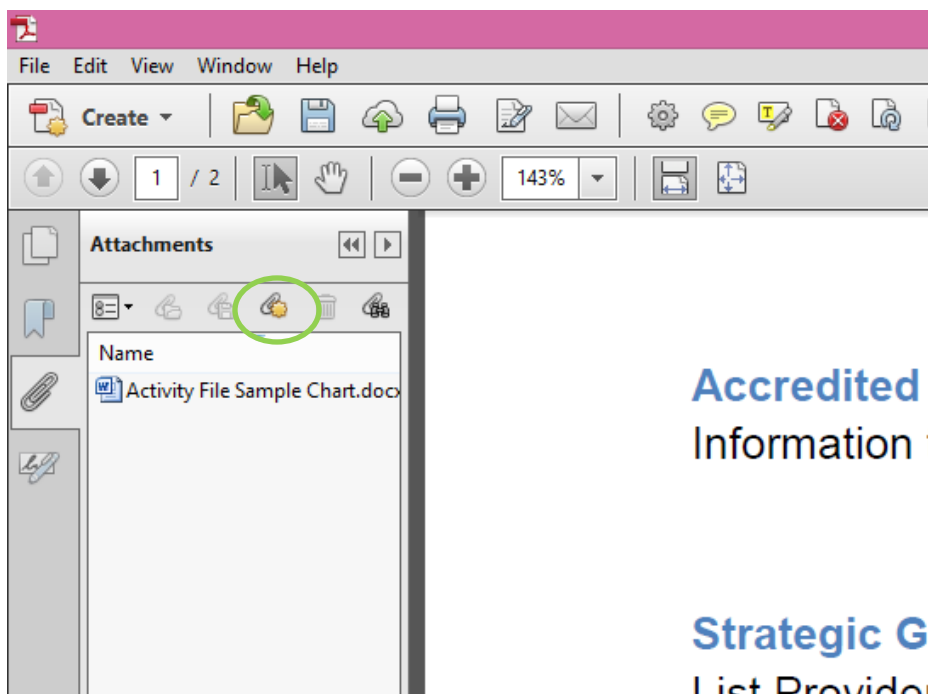
**Provider Criterion 2: Educational Design Process**

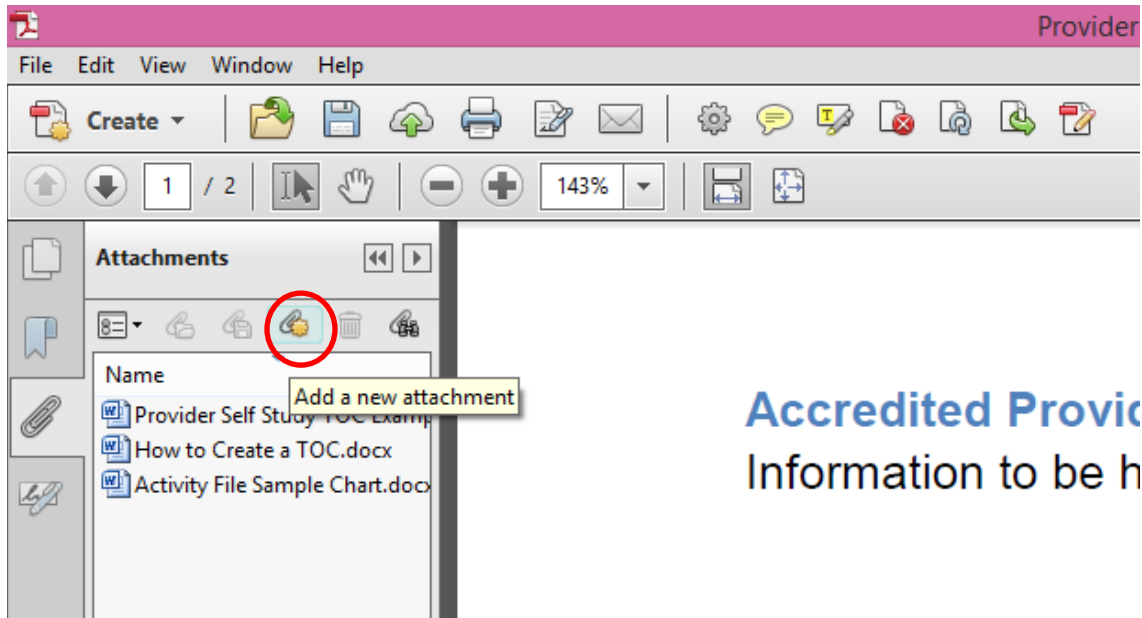
**Step 4:** Find your attachment in your files, select Open.



Provider Criterion 2: Educational Design Process

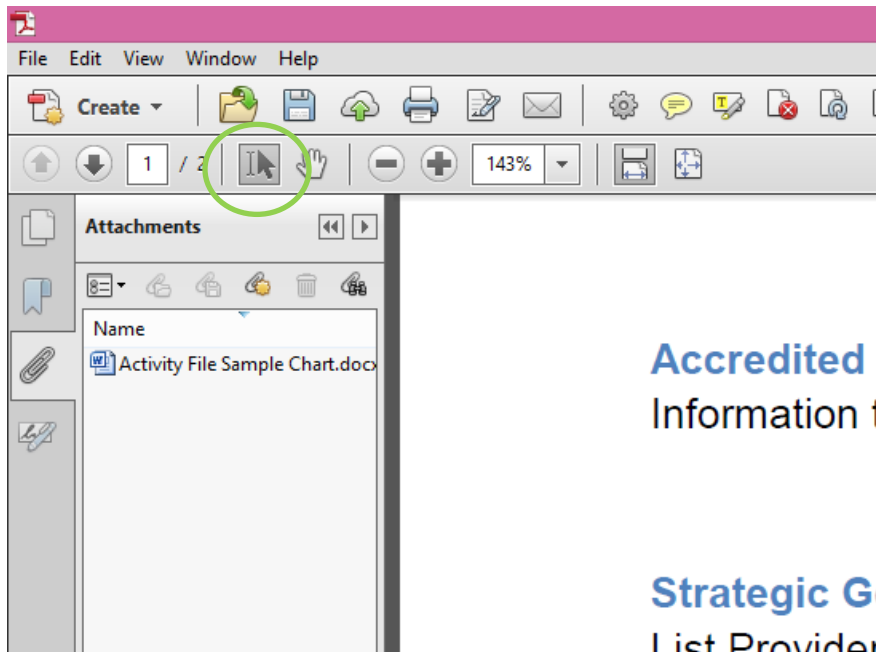
**Step 5:** Your attachment will be listed on the left hand display pane when it is attached. You can continue to upload using steps 1-4 or click on the paperclip with the starburst for a quicklink to upload attachments.





\*When referencing an attachment in your document, make sure to reference the file name. For example, see attachment “How to Create a TOC.”

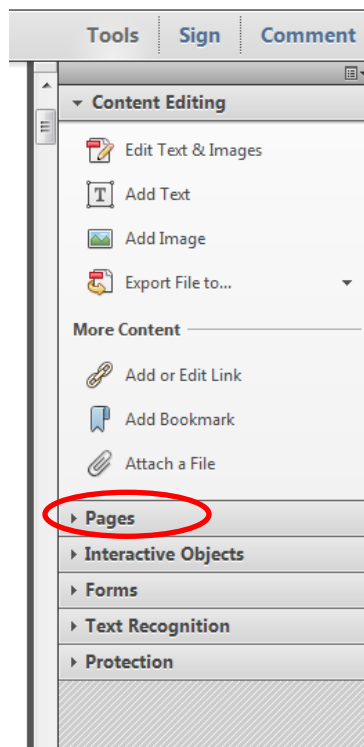
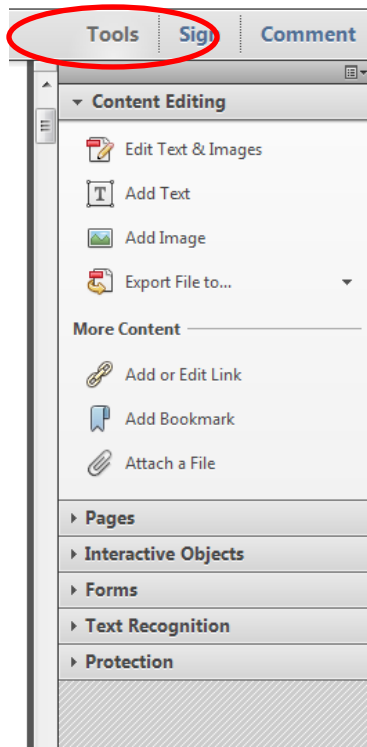
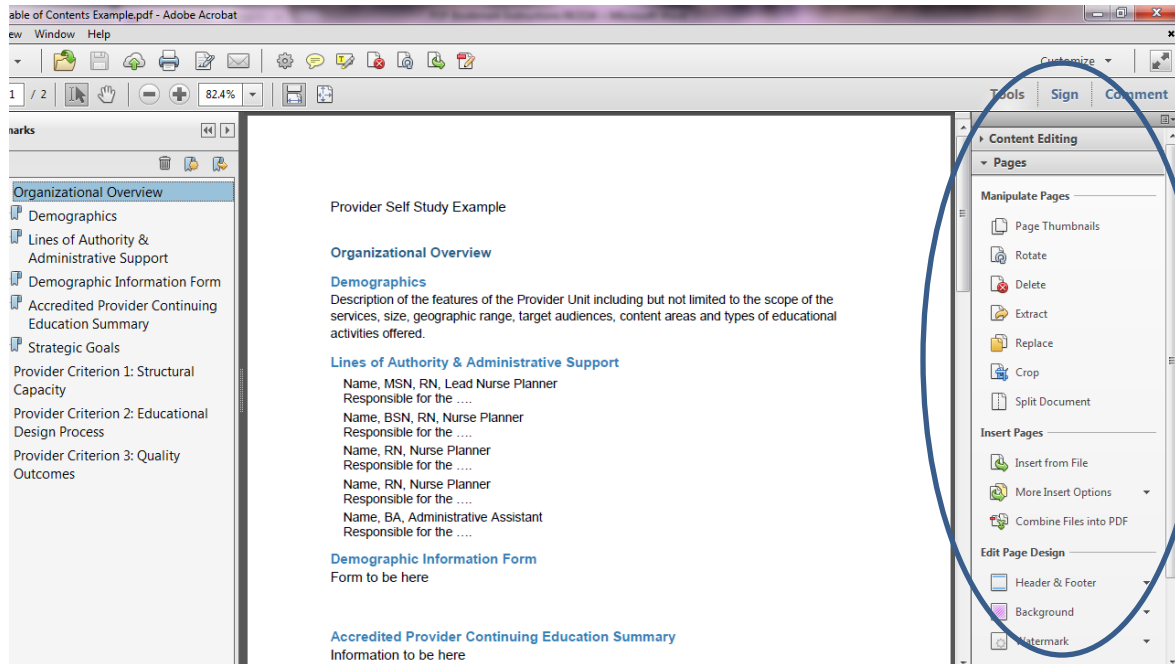
You can sort by name using the arrow above the “name” of the files, this will alphabetize the files to make it easier to locate them by name.



## How to Page Number your PDF

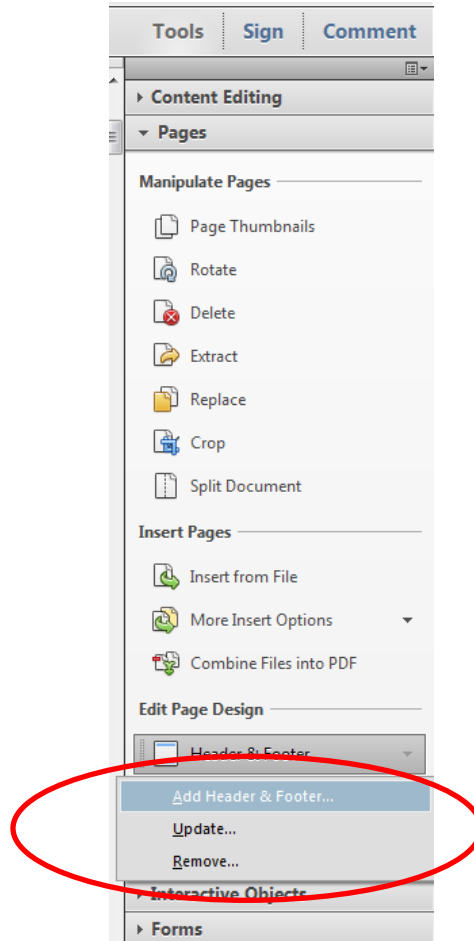
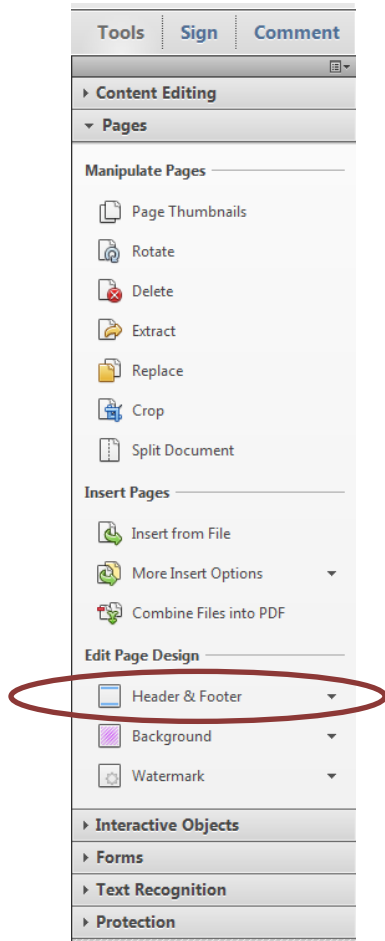
Our documents are required to be paginated. These steps explain the process to insert page numbers.

**Step 1:** On the right side of the screen in Acrobat, under Tools, click on Pages.

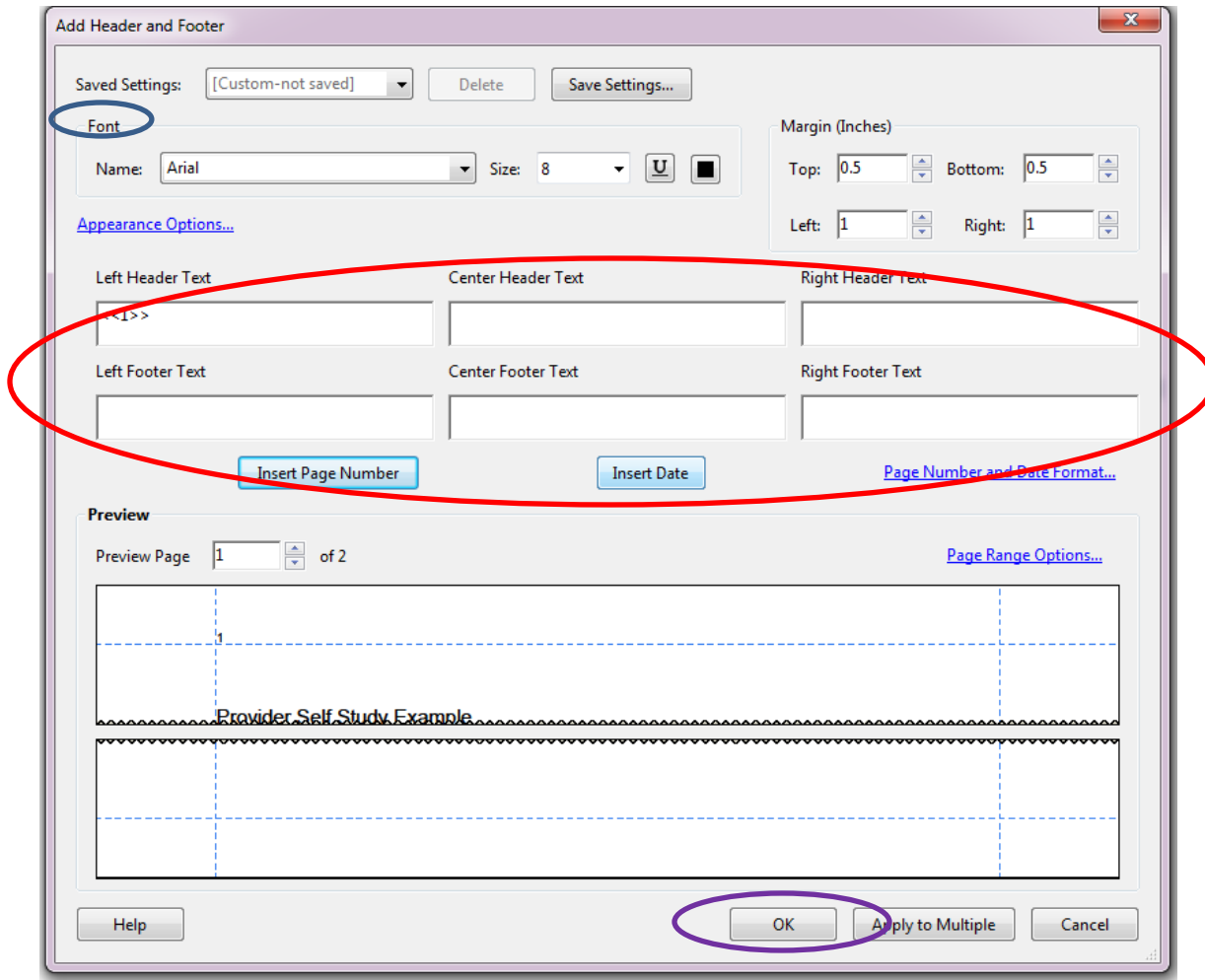




**Step 2:** The Pages menu will drop down new options. Choose Header & Footer. Click add Header & Footer.



**Step 3:** A Menu will pop up with options for you to choose from. Here you can choose a font, insert any header or footer, preview what you are inserting, etc. Simply choose where you want the page number in the document (left, center or right footer text) then click your mouse in the box. Then click the button to Insert a Page Number, it will show the page number in the box that you picked. You can use this to insert a date as well.



**Step 4:** Click Ok and you are done.

## How to “Combine Files into a PDF” using Acrobat Pro

### **Step 1: Organize Your Activity Files**

Organize your files and save them to where you can locate them all easily. They may be saved in any format Word, Excel, PDF, etc.

Tip 1: Put them all into a Folder and label it “Activity File 1”

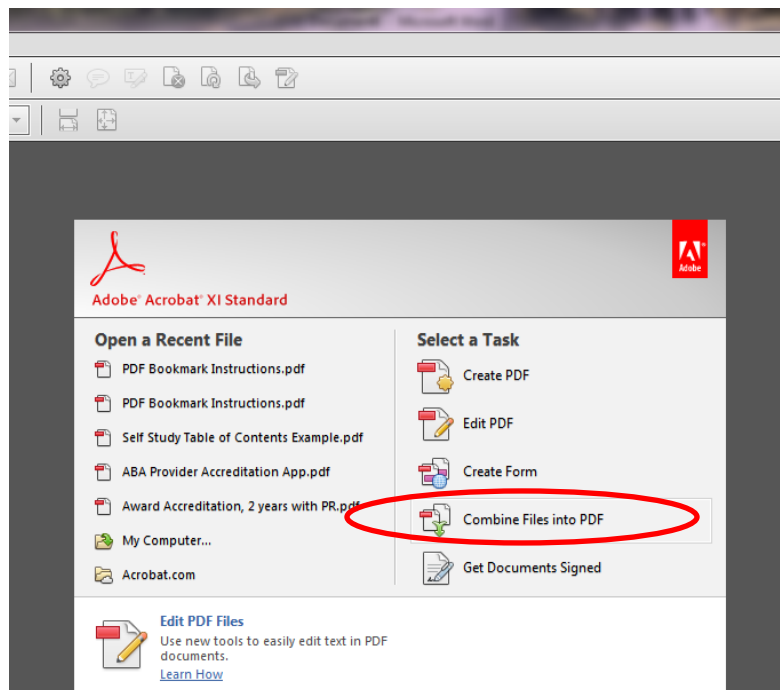
Tip 2: Make a list of all of the files that you will be combining for your Activity File. Organize them into the final order that you will be putting them in your Activity File; refer to Appendix A in the Application Manual.

Tip 3: Use our Activity File Requirements list as a checklist to ensure you have everything ready to create your file. You cannot edit the text once you have imported the document into Adobe.

### **Step 2: Open Adobe Acrobat Pro.**

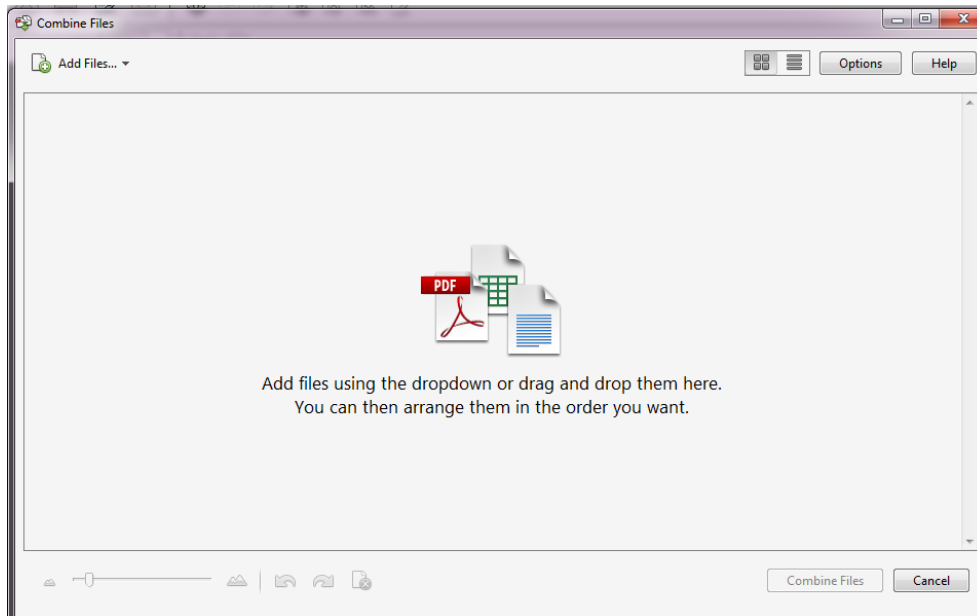
Open Adobe Acrobat. Below is a screen shot of the Home Page. On the left is a list of documents that you have previously opened or created (recent files). On the right are your task options. You will need to click on “Combine files into PDF” (top right) to start a document.

Shot 1:



After you select Combine files into a PDF, this screen will open.

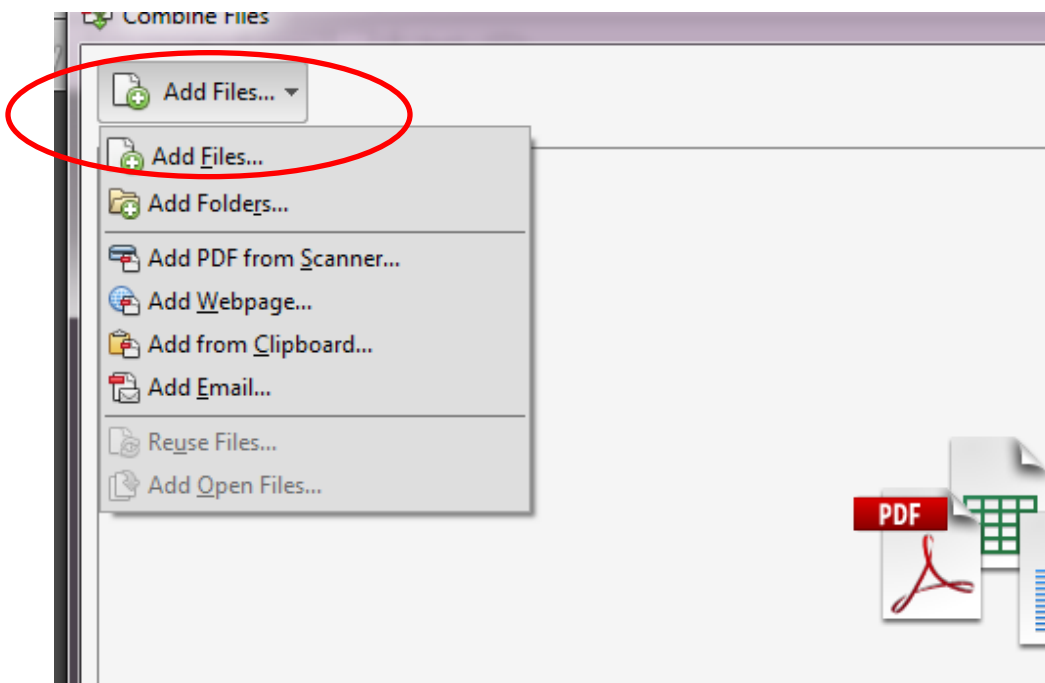
Shot 2:



### Step 3: Add Files

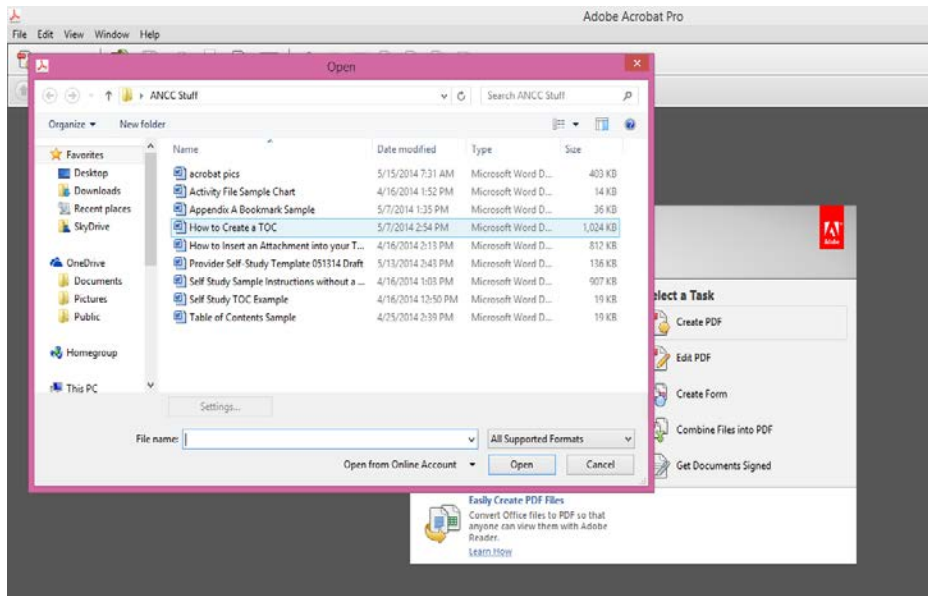
Go to Add Files in the top left. In the drop down menu, select Add Files. This will take you to the document library on your computer.

Shot 3:



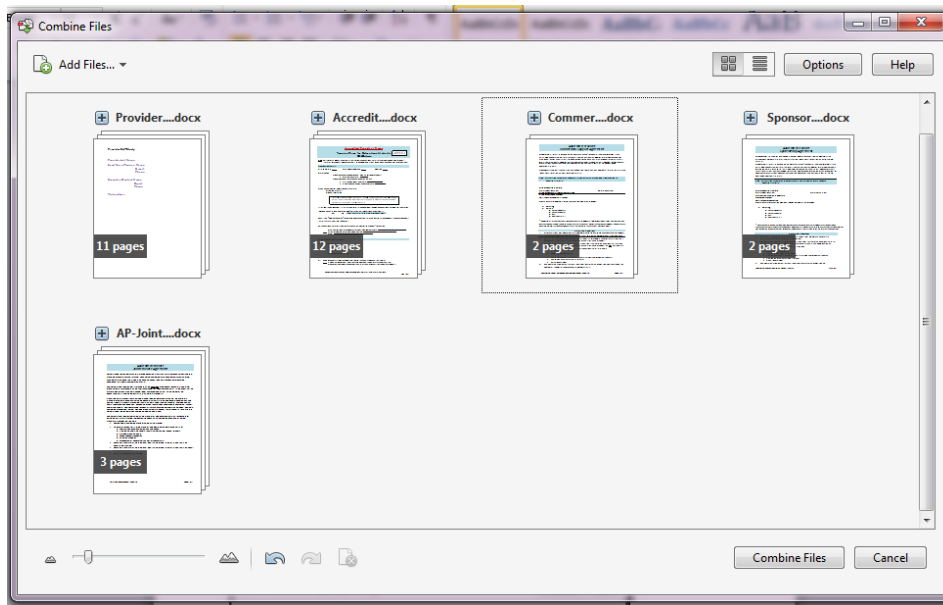
Choose all the files from your document library that you wish to have in your final document. (Refer to your written list.)

Shot 4:



As you add files to your document list, they will show here. You can go to your document library as many times as you want BEFORE you Combine Files.

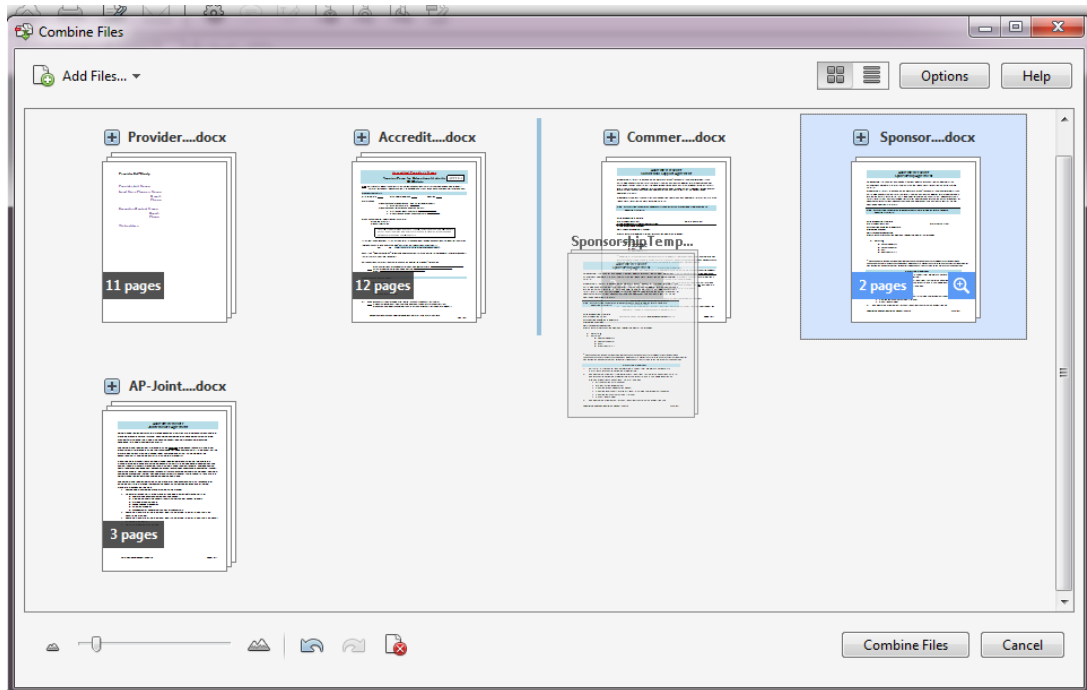
Shot 5:



## Step 4: Arrange Files in Final Order

You can re-arrange the order of the files by clicking on the file icon and dragging them around the screen. The order that you place them, will be the FINAL order of how they are in your document. Again, refer to your list & make sure that your files are in the same order!

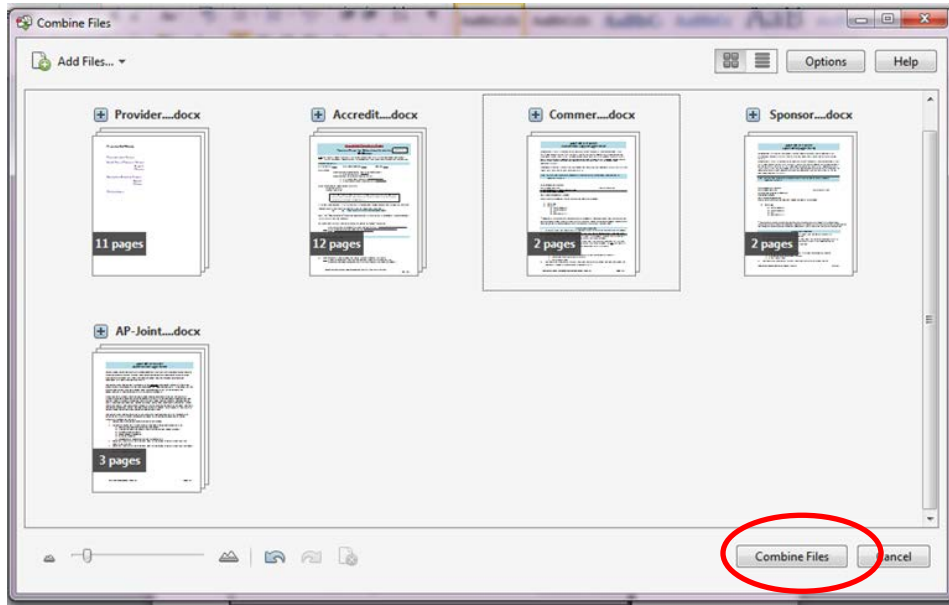
Shot 6:



## Step 5: Combine Files to Finalize the Document

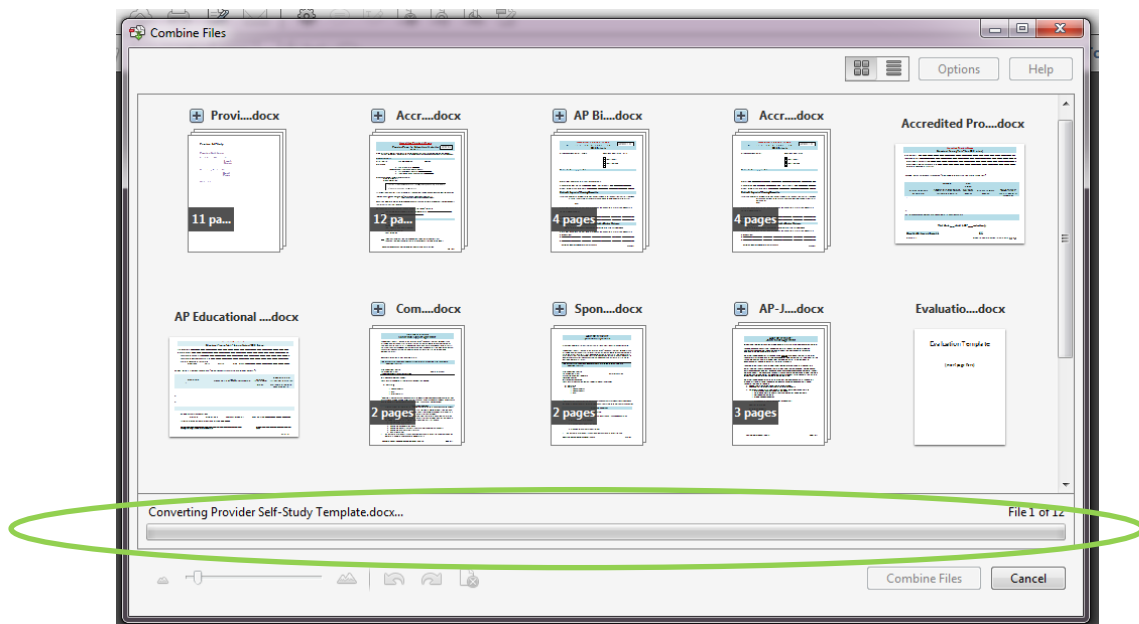
When your files are in order and ready, click Combine Files in the bottom right to finalize the document and create the PDF with Bookmarks.

Shot 7:



Adobe will begin creating your file, this process will take 3-5 minutes depending on the size. You will see a green bar across the bottom, that says "Converting."

Shot 8:

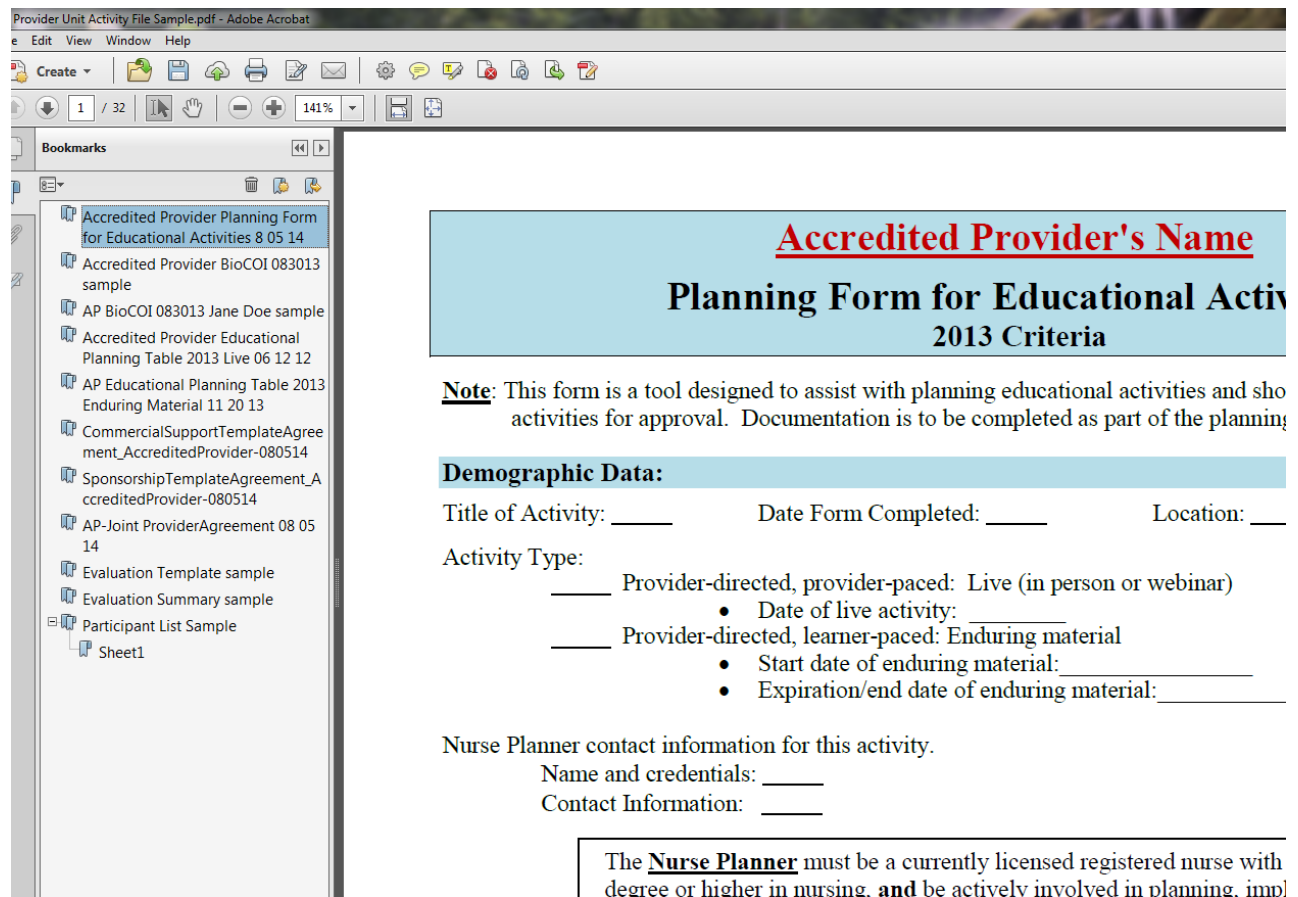


When Adobe is done, your new completed PDF file will open with Bookmarks created. The bookmarks will be of the names of the files that you uploaded.

You will need to re-name some of your Bookmarks. Click on the Bookmark on the left menu to highlight the words (bookmark link) and type in the new name.

**Be sure your bookmarks list matches the Activity File Requirements list by name and order exactly.**

Shot 9: Imported product



The screenshot shows the Adobe Acrobat interface. On the left, the 'Bookmarks' panel is open, displaying a list of bookmarks. The first bookmark, 'Accredited Provider Planning Form for Educational Activities 8 05 14', is selected. The main content area on the right displays a form titled 'Accredited Provider's Name Planning Form for Educational Activities 2013 Criteria'. The form includes a 'Note' section, a 'Demographic Data' section with fields for 'Title of Activity', 'Date Form Completed', 'Location', and 'Activity Type', and a section for 'Nurse Planner contact information'. A box at the bottom right contains a note about the 'Nurse Planner' role.

**Accredited Provider's Name**  
**Planning Form for Educational Activities**  
**2013 Criteria**

**Note:** This form is a tool designed to assist with planning educational activities and show activities for approval. Documentation is to be completed as part of the planning.

**Demographic Data:**

Title of Activity: \_\_\_\_\_ Date Form Completed: \_\_\_\_\_ Location: \_\_\_\_\_

Activity Type: \_\_\_\_\_

\_\_\_\_\_ Provider-directed, provider-paced: Live (in person or webinar)

- Date of live activity: \_\_\_\_\_

\_\_\_\_\_ Provider-directed, learner-paced: Enduring material

- Start date of enduring material: \_\_\_\_\_
- Expiration/end date of enduring material: \_\_\_\_\_

Nurse Planner contact information for this activity.

Name and credentials: \_\_\_\_\_

Contact Information: \_\_\_\_\_

The **Nurse Planner** must be a currently licensed registered nurse with degree or higher in nursing, **and** be actively involved in planning, impl