



Acrobat X Action: Flatten Fields and Comments

Transform interactive forms and comments so that they are not editable

Flattening permanently locks content in form fields and comments so you can be assured that information may no longer be changed.

Acrobat X Pro introduced Actions, a powerful way to standardize processes by automating routine, multistep tasks. Since Actions may be extended via JavaScript, there are any number of additional operations which can benefit from automation.

The Acrobat X Flatten Fields and Comments Action moves the data from editable form fields and annotations into the main (non-editable) layer of the document preserving the appearance of form fields, highlights, stamps, and other annotations.



Visit the Adobe Acrobat User Community for more Acrobat Actions

<http://acrobatusers.com/actions-exchange>

Actions are compatible with:

- Adobe Acrobat X Pro
- Adobe Acrobat X Pro Suite

Travel Authorization Date

First Last

Address

City

State Zip

Travel to

Travel Authorization Date 12/1/2010

First Jason Last Smith

Address 11421 Elm Street Circle

City East Rutherford

State New Jersey Zip 07073

Travel to Portland, ME

About Flattening

Acrobat X Pro introduced Actions, a powerful way to standardize processes by automating routine, multistep tasks. Since Actions may be extended via JavaScript, there are any number of additional operations which can benefit from automation.

Flattening moves the data in editable form fields and comments into the main document layer so that this information may no longer be changed.

Ask Jennifer to check the Adobe web site about this feature before we publish.

About Flattening

Acrobat X Pro introduced Actions, a powerful way to standardize processes by automating routine, multistep tasks. Since Actions may be extended via JavaScript, there are any number of additional operations which can benefit from automation.

Flattening moves the data in editable form fields and comments into the main document layer so that this information may no longer be changed.

Note that many Acrobat comment types may have sticky notes attached. When flattened, the information in the sticky note will no longer be available, but the icon or appearance of the annotation will be preserved.

Who benefits from flattening fields?

- Life Science professionals who need to ensure that data collected as part of a clinical trial cannot be changed
- Lawyers exchanging interrogatory forms who want to ensure opposing council cannot edit the form information
- Anyone who wants to ensure that data typed into a form cannot be edited

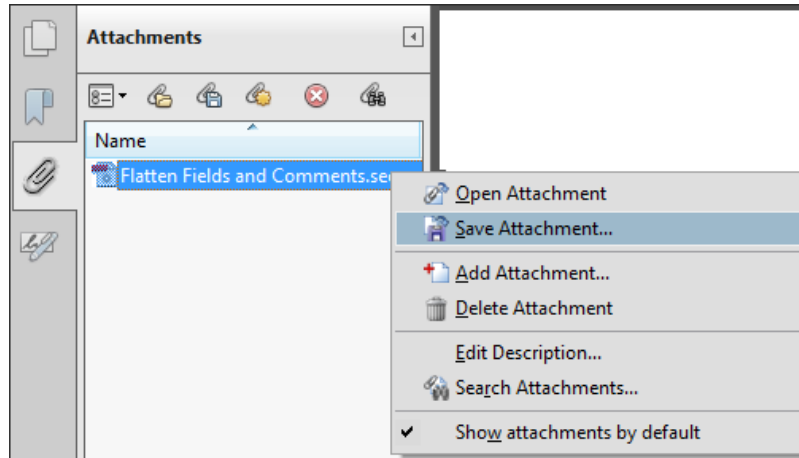
Who benefits from flattening comments?

- Accountants exchanging audit results who need to make sure that auditing comments cannot be changed
- AEC Professionals who need to lock down commented drawings and plans
- Anyone who wants to ensure that comments and annotation will always print

Extracting the Flatten Fields and Comments Action

Before installing the Action, you will need to extract it from this document.

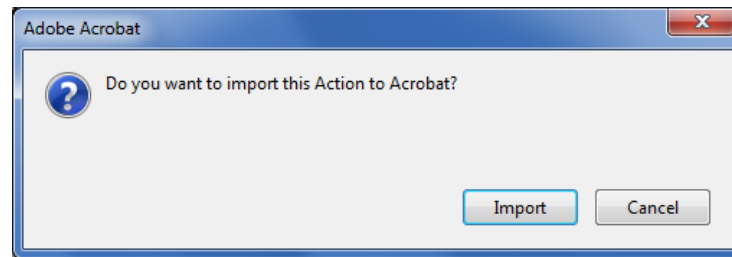
1. In the Attachments Panel at left, select **Flatten Fields and Comments.sequ**
2. Right-click and choose *Save Attachment* to your desktop or other convenient location



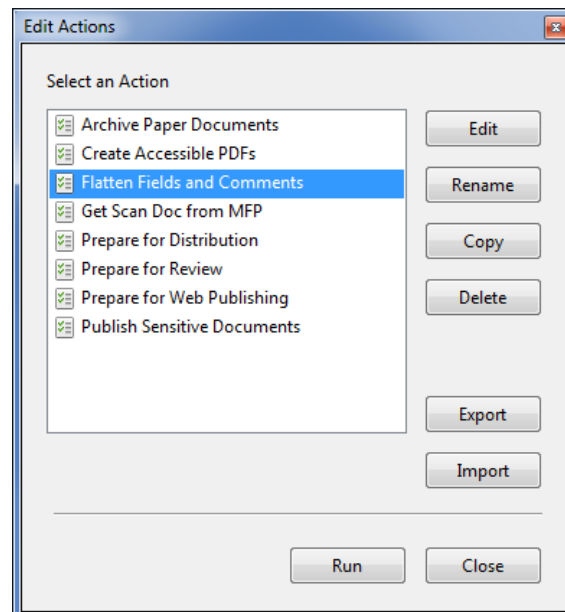
Installing the Flatten Fields and Comments Action

To install the Flatten Fields and Comments Action

1. Locate the **Flatten Fields and Comments.sequ** file on your desktop (or other location)
2. Double-click the file and click the Import button.



The *Edit Actions* window will open and display the newly imported Action:



Using the Flatten Fields and Comments Action

The Flatten Fields and Comments Action operates on the current document open in Acrobat.

Run the Flatten Fields and Comments Action

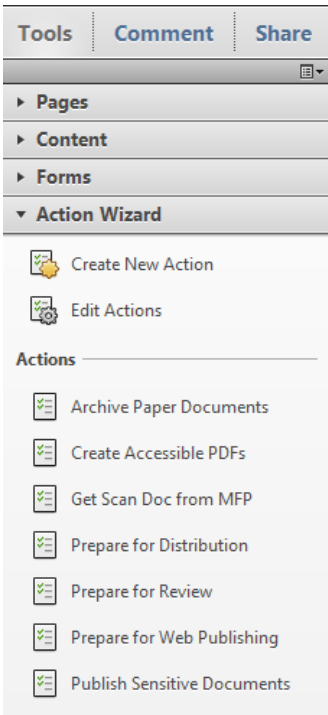
1. Open a document.
The Flatten Fields and Comments Action will not be available unless a document is open.

Open the Tools Pane and choose the Action Wizard and click the Flatten Fields and Comments Action

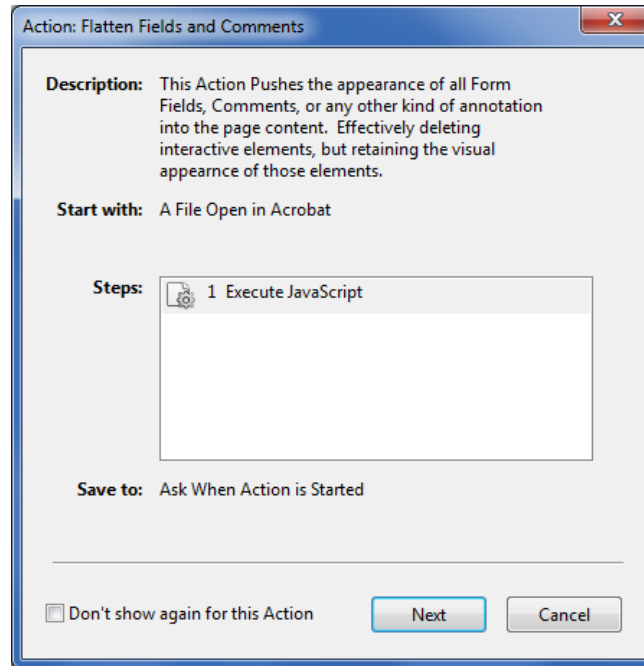
— or —

Choose File> Action Wizard> Flatten Fields and Comments

2. Acrobat will ask you to confirm that you wish to run the Action. Click the **Next** button.



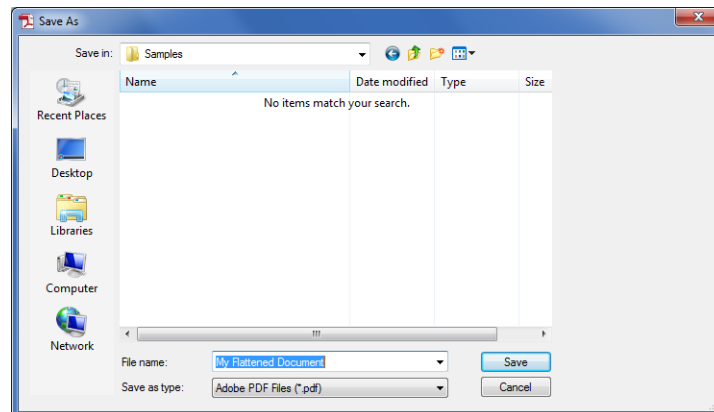
An easy way to access Actions is through the Action Wizard Tool Pane



3. Save the file using a file name and location of your choosing. Click the **Save** button.

Caution!

If you do not change the file name when saving, you will overwrite your original file.



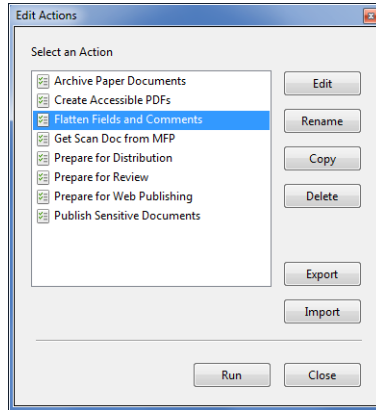
Editing the Flatten Fields and Comments Action to Automatically Rename the Flattened Document

Why rename documents?

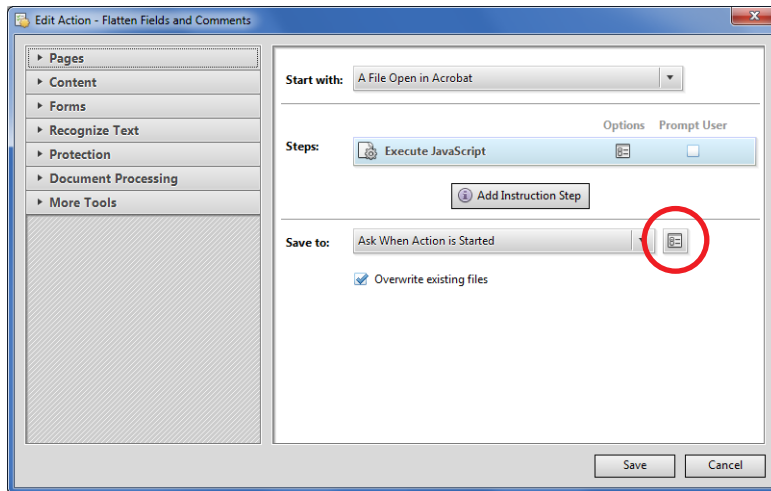
Acrobat will always ask you to confirm when overwriting a document, but having to manually enter a new name for a flattened file can be time consuming. By automatically appending, for example *_flat* to the original file name, you can save time and tell at a glance if the file has been flattened.

It's easy to edit the Action to save a copy of the flattened file under a new name.

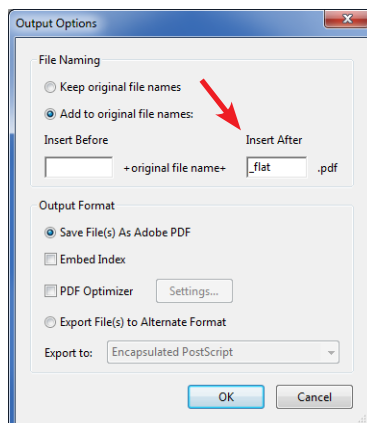
1. In the Action Wizard pane, choose Edit Action
—OR—
Choose File> Action Wizard> Edit Actions
2. Select the Flatten Fields and Comments Action and click the **Copy** button



3. In *Save to:* section of the Edit Action window, click the Destination Options button.



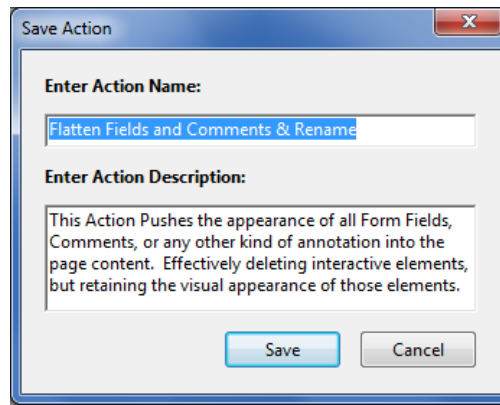
4. Set the Action destination. In the Output Options window add a file name prefix or suffix. Click the **OK** button.



Sharing Actions?

Acrobat X Pro makes it easy to share actions. From the Action Wizard pane, choose Edit Action and click the Export button. As a best practice when creating actions, enter an understandable name and useful description.

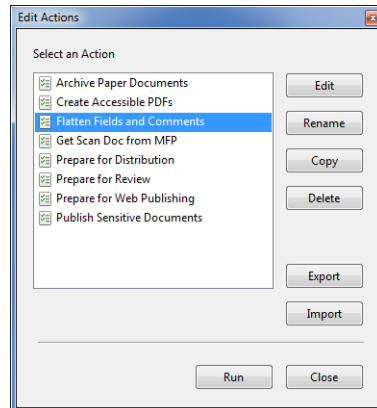
5. Edit the name for revised action. Click the **Save** button.



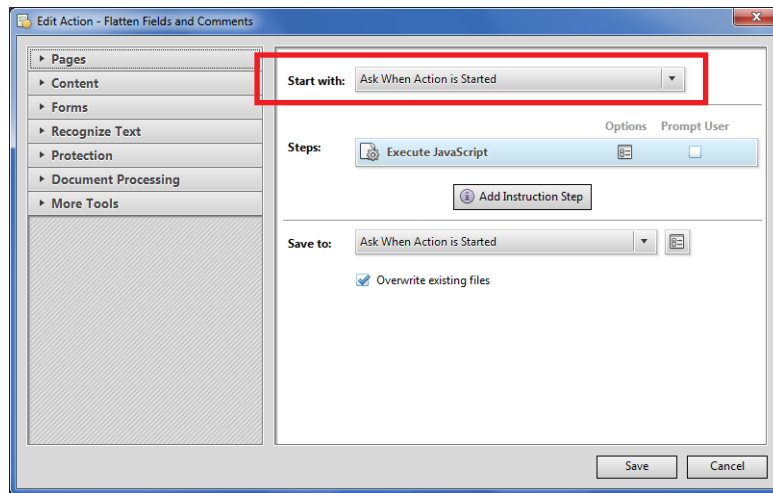
Editing the Flatten Fields and Comments Action to Flatten Multiple Files

Have a lot of PDF forms or commented documents to flatten? You can easily edit the action to process multiple files.

1. In the Action Wizard pane, choose Edit Actions
—or—
Choose File> Action Wizard> Edit Actions
2. Select the Flatten Fields and Comments Action and click the **Copy** button

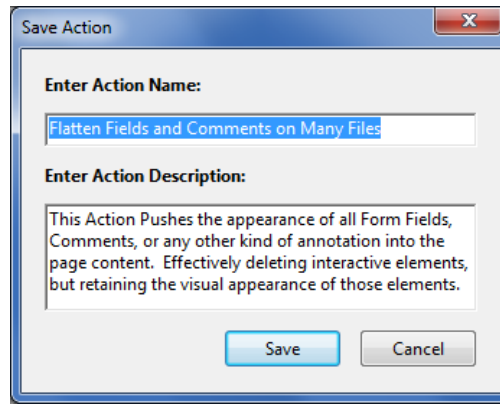


3. Select the *Start with* drop down menu and change to "Ask When Actions is Started"



4. Click the **Save** button.

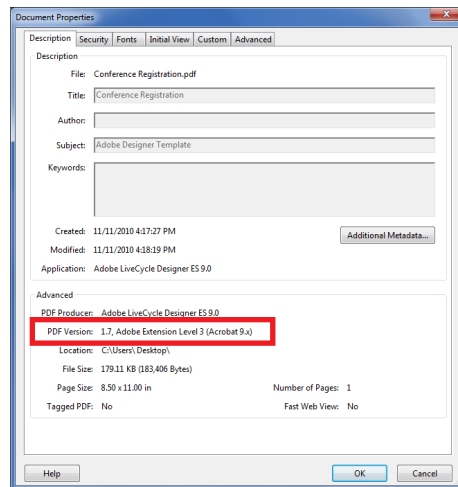
5. Edit the name for revised action. Click the **Save** button.



Questions and Answers

The Action did not flatten my form. Why?

The Flatten Fields and Comments Action can only flatten forms which were created in Acrobat (AcroForms). Forms created in LiveCycle Designer (XFA Forms) cannot be flattened. The only way to flatten an XFA form is to print it to the Adobe PDF print driver. To check if the form you need to flatten is an XFA form, choose File> Properties and click on the Description tab:



Flatten Fields and Comments Action created by WindJack Solutions, Inc.

Our mission is to make Acrobat and PDF easier to use and more accessible for everyone. We specialize in all the programming activities surrounding Acrobat and PDF, including plug-ins, JavaScript automation, form scripting, and server scripting. We have been at it since 1997 and we accomplish our mission by mentoring, writing articles, teaching classes, creating educational materials, lecturing at conferences and of course by creating our line of software products and services for assisting document designers and developers to get the most out of PDF. We are currently delivering our accumulated knowledge of PDF and Acrobat development to users through our membership website at <http://www.pdfscripting.com>



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I need to preserve the contents of notes and make them visible. What should I do?

Try creating a Comment Summary. Here's how:

1. Open the Comments pane.
2. Click the Options button and choose Create Comment Summary

