Creating Secured PDF Documents
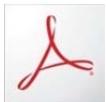
With Adobe Acrobat Pro (Windows)

Creating an Adobe Acrobat Security Policy Template

1. Open Adobe Acrobat Pro
2. Click on **Tools**, **Protection**, **Encrypt** and **Manage Security Policies**
3. Click on **New**
4. Keep **Use passwords** selected and click on Next
5. Under **Policy name:** enter the name of your Security Policy Template and a brief description (optional)
6. Click on **Next**
7. Click the check box next to **Restrict Editing and printing of the document….** to select it
8. Enter a password under **Change Permissions Password**
9. Under **Printing Allowed**, select **None** to disable printing functionality (Low or High Resolution allows printing.)
10. Under **Changes Allowed**, select
    - **None** - restricts users from making any changes to your document.
    - **Inserting, deleting, and rotating pages** — User editing is restricted to manipulating document pages, including deleting and rotating pages.
    - **Filling in form fields and signing existing signature fields**— User editing is restricted to filling-in form fields and adding digital signatures.
    - **Commenting, filling in form fields and signing existing signature fields**— User editing is restricted to adding PDF comments, filling-in form fields, and adding digital signatures.
    - **Any except extracting pages** — Users are allowed to use all the editing features available in their PDF viewer, however page-extraction is disabled.
11. **Enable copying of text, images, and other content** — Allows the user to select and copy the document content to their clipboard for pasting into another file.
12. **Enable text access for screen reader devices for the visually impaired** — Allows screen-reading software to access the textual content in your document for audible reading.
13. Click on **Ok** twice
14. Reenter your password and click on **OK**
15. Click on **Finish**. Your template is now created and can be use to secure all your PDF documents.

Creating a secured PDF document Using your Security Policy Template

1. Select **Print** from the application you are printing from
2. Change the Printer selection to **Adobe PDF**
3. Click on **Ok** to print
4. At the **Save PDF File As** Dialog Box, select the folder to store the PDF file. The filename will be the same as the original document, but with the .pdf extension name (you do have the option to change it.)
5. Click on **Save**. The PDF document opens in Adobe Acrobat Pro.
6. In Adobe Acrobat Pro, click on **Encrypt** on the Toolbar and your template.
7. It'll ask you if you want to change the security on this document. Click on **Yes.** If a warning message about saving your document appears, click on **OK**.
8. Save your PDF document to apply the changes.

With PrimoPDF (Windows)

1. Select **Print** from the application you are printing from
2. Change the Printer selection to **PrimoPDF**
3. Click on **Ok** to print
4. Do one of the following
   - Follow the steps below if setting up the **PDF Security** for the first time or if you need to edit the current settings.
   - Or skip to step **14** to use the current PDF security settings on your document.

5. Under PDF Security, click on **Change**
6. In the **Permissions area**, click on the **Require a password to change security...**
7. **Password** — Enter the desired password to restrict specific document functionality.
8. **Confirm Password** — Repeat the password to detect and avoid typing errors.
9. **Printing Allowed** — select **None** to disable printing functionality.
   - **Low Resolution** — Allows printing but lowers the resolution and quality of images.
   - **High Resolution** — Enables unrestricted print quality.
10. **Changes Allowed** — Allows you to specify the level at which users can modify or access content within the document.
    - **None** — Restricts the user from making any changes to your document, unless the specified Permissions Password is supplied.
    - **Creating, inserting, deleting, and rotating pages** — User editing is restricted to manipulating document pages, including adding, deleting, and rotating pages.
    - **Commenting, filling in form fields and signing** — User editing is restricted to adding PDF comments, filling-in form fields, and adding digital signatures.
    - **Any except extract pages** — Users are allowed to use all the editing features available in their PDF viewer, however page-extraction is disabled.
11. **Enable copying of text, images, and other content** — Allows the user to select and copy the document content to their clipboard for pasting into another file.
12. **Enable text access for screen reader devices for the visually impaired** — Allows screen-reading software to access the textual content in your document for audible reading.
13. **Always use these settings** — Enables the entire selected security configuration to be automatically applied to all subsequent documents.

14. Click on **Create PDF**.
15. Select a folder for the PDF document and change the filename.
16. Click on **Save** to create your secured PDF document.

With a Mac

Mac OS X already provides a way to convert documents to secured PDF. You can easily perform the conversion without installing any software.

To convert documents to PDF in Mac OS X follow the steps below:

1. Open your file with your Text Editor (ex: Ms Word, TextEdit, Writer, Excel, Open Office etc)
2. Click on **File**, **Print** or Press **Command + P**


3. The **Print** window will pop up. Click on the **PDF** button at the bottom left and select **Save as PDF**
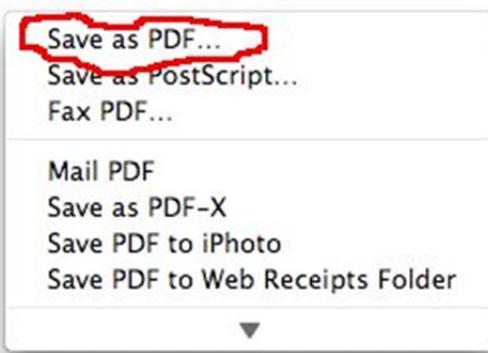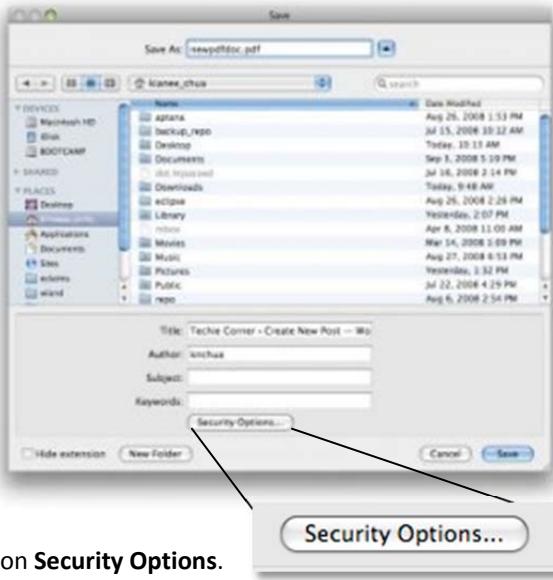
4. In the **Save** window, click on **Security Options**.
5. In the **PDF Security Options** window, select the following to secure your PDF document:
   a. Select both **Require password to copy test, images and other content** and **Require password to print document**.
   b. Enter a **Password** and **Verify**.
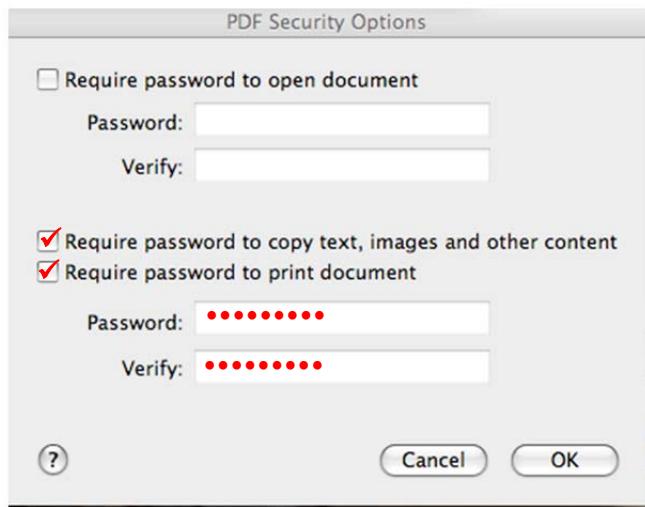
   c. Click on **OK**.
6. Choose the location you want to save your PDF file.
7. Click on **Save.**