

Revised 08/17/11

Scan to PDF Instructions (Epson scanner example)

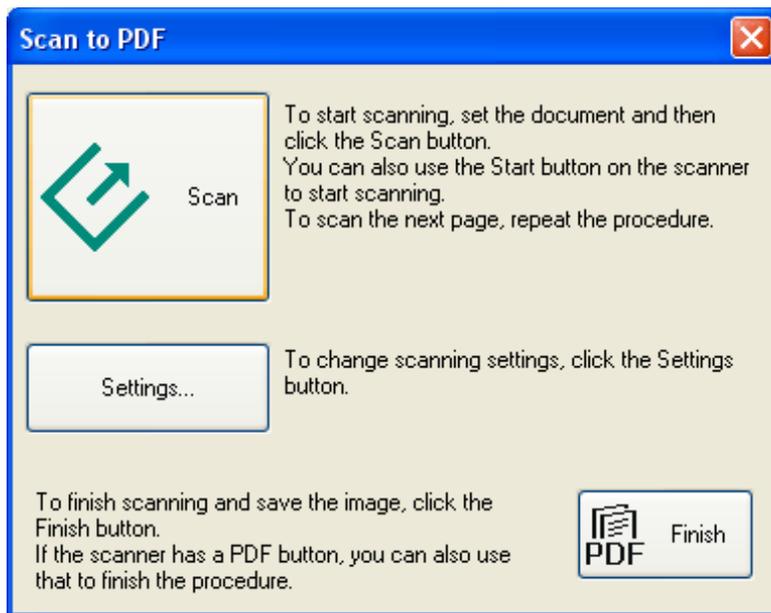
Scan to PDF Adobe Acrobat 9.0

A. Scan to PDF Instructions

Refer to the user manual for your scanner. These instructions are for an Epson scanner, but will highlight (see BLUE) a few basic steps you need to check when scanning documents. It is very important for you to select the correct **image type, size, and resolution setting**.

In Windows, you need Adobe Reader or Acrobat to view PDF files. You can download Adobe Reader for free from Adobe's website.

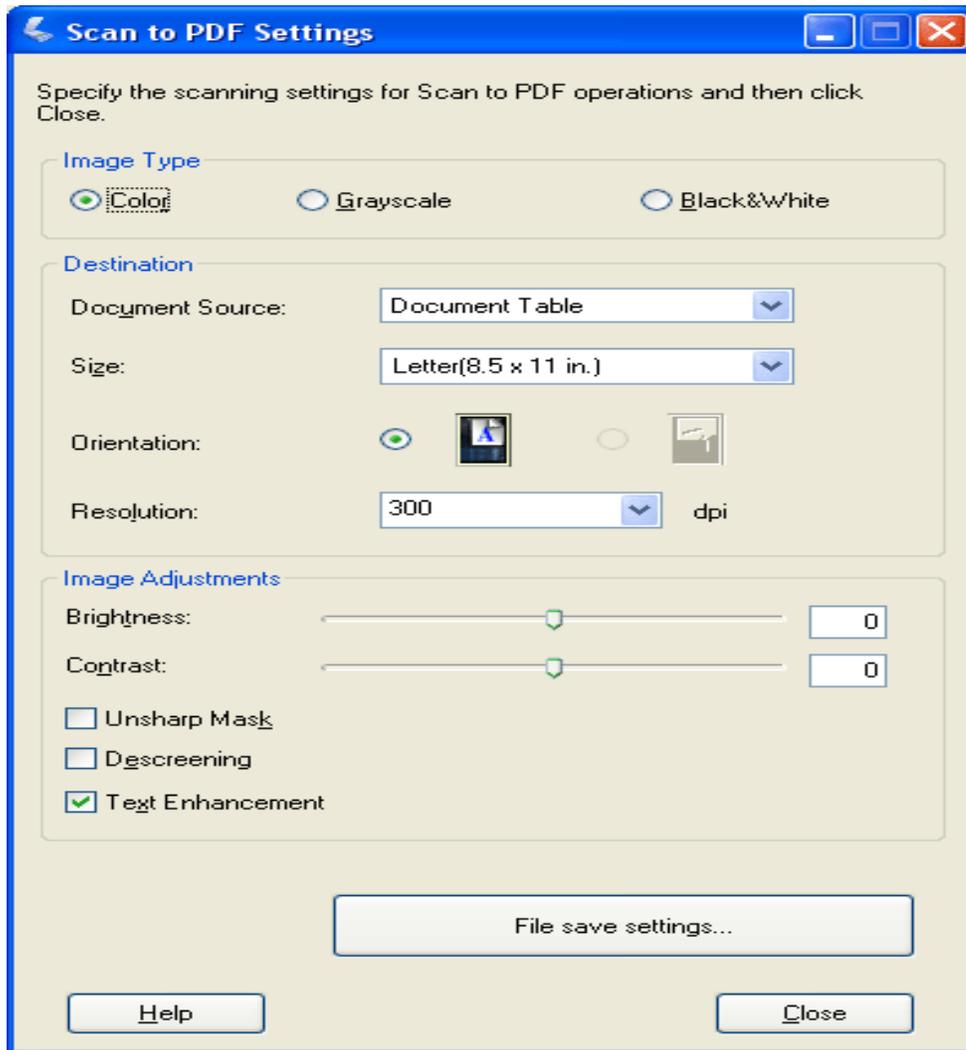
1. Click "Start" button on the lower left-hand corner, choosing "All Programs" and double-clicking on the name of the scanner to open the scanner software on your computer.
2. Place document facedown on the scanner and close the cover.
3. Click "File" and choose "New" or "New Scan." Or Press the  Scan to PDF button on the scanner. You see the Scan to PDF window.



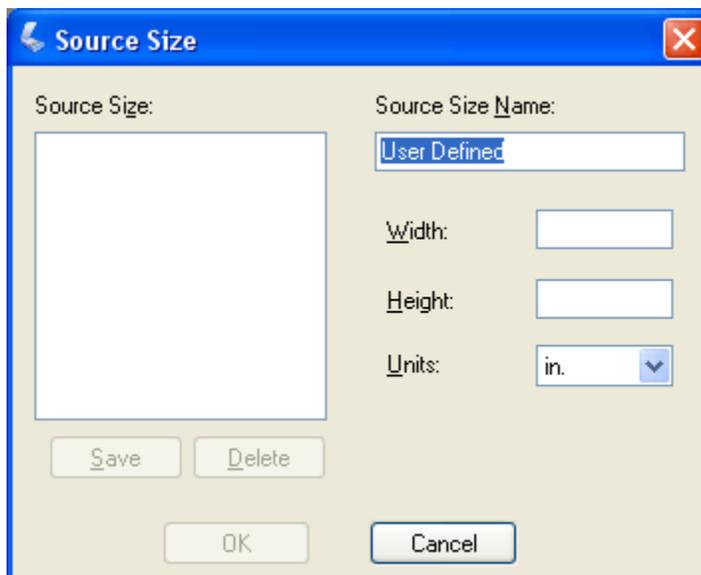
4. Click the **Settings** button. You see the Scan to PDF Settings window.

a. Click the Color, Grayscale, or Black&White button to match the colors in the original.

b. Click the arrow to open the Size list and select the size of your original. You may need to select "Image" and enter "Full Size" or "100 percent," depending on the scanner model, in the size selector box.



c. If you have a size that is not in the Size list, you can create a custom size. Click the arrow in the Size list and select **Customize**. You see the Source Size window. Type a name for your custom size, enter the size, click the **Save** button, then click **OK**. Your new size appears in the Size list.



d. Click the arrow next to the Resolution list and select the number of dots per inch at which you want to scan. See the table below for guidelines. For e-filing, the recommendation is 200 dpi.

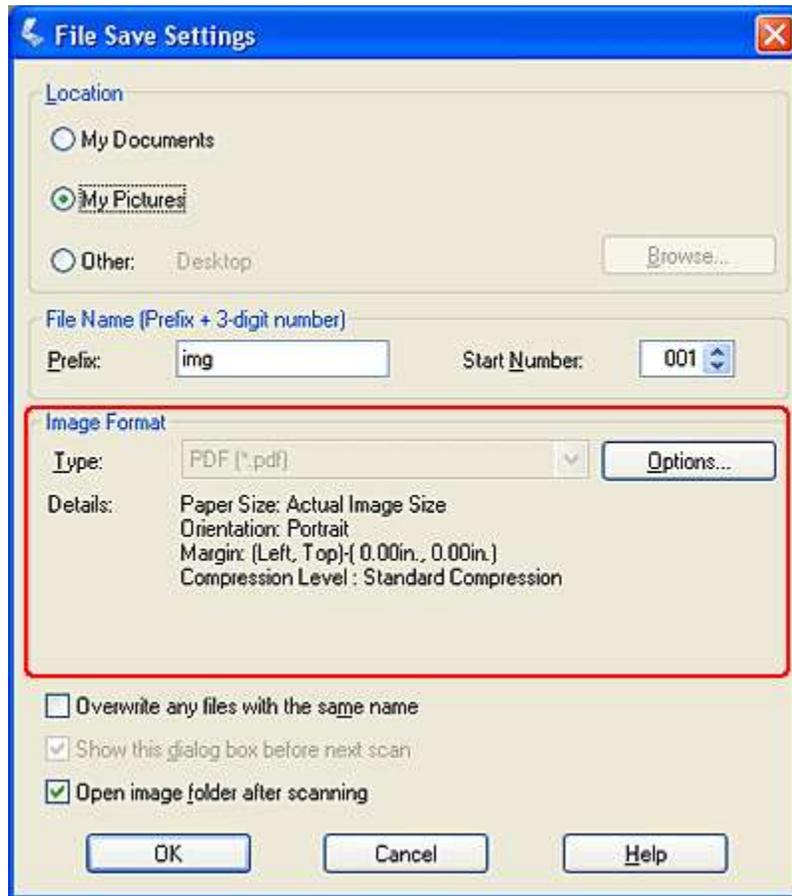
What you will do with the scanned image	Suggested scan resolution
Send via e-mail, upload to web, view only on the screen	96 to 150 dpi
PDF for e-filing	200 dpi
Print	300 dpi

e. Use the settings in the Image Adjustments area of the window to modify the image quality if necessary. See the table below for guidelines.

Setting	Description
Brightness	Adjusts the overall image lightness and darkness.
Contrast	Adjusts the difference between the light and dark areas of the overall image.
Unsharp Mask	Turn on to make the edges of image areas clearer for an overall sharper image. Turn off to leave softer edges.
Descreening	Removes the rippled pattern that can appear in subtly shaded image areas, such as skin tones. Also improves results when scanning magazine or newspaper images that include screening in their original print process.
Text Enhancement	Improves the definition of text and line art.
Threshold	Adjusts the level at which the black areas in text and line art are delineated. (Available only when you select Black&White as the Image Type setting.)

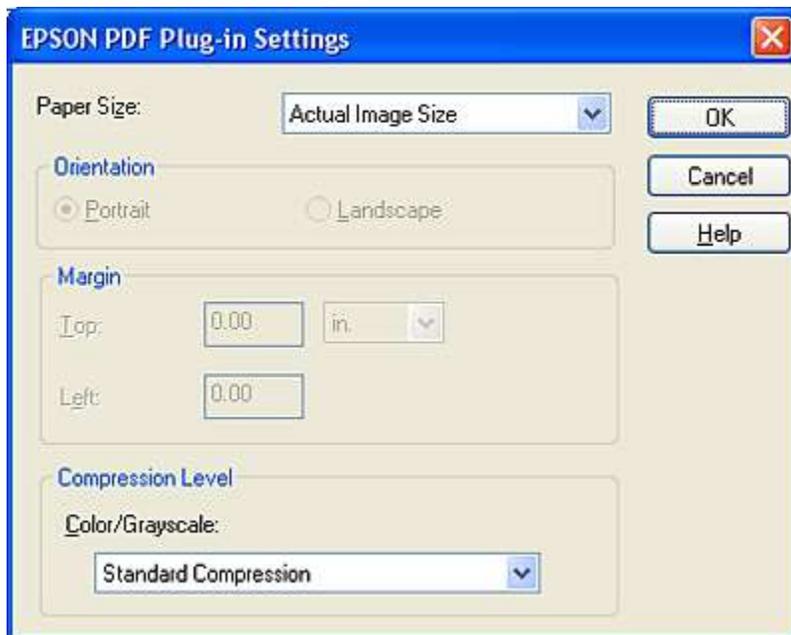
f. Click the **File save settings** button. The File Save Settings window appears. The current Paper Size, Orientation, Margin, and Compression Level settings are displayed below it.

g. Select **location** where you want to save your pdf file.



5. If you need to change any of the current PDF settings, click the **Options** button. You see the Epson PDF Plug-in Settings window.

- a. Select the settings that match your document and click **OK**. You return to the File Save Settings window.



- b. Click **OK** again, click **Close**,

6. Click **Scan** or press the  Start button on the scanner.
7. If you are scanning multiple pages, replace the first page on the document table with the second page and click **Scan** or press the  Start button again. Repeat this step for each page in your document.
8. When you are finished, click **Finish** or press the  Scan to PDF button on the scanner. Your document is saved as a PDF file.

B. Scan to PDF with Adobe Acrobat

Note: Instructions were extracted from Adobe On-line Reference at help.adobe.com for Adobe Acrobat 9.0. Please see sections highlighted in RED for e-filing recommendations.

Scan a paper document to PDF

You can create a PDF file directly from a paper document, using your scanner and Acrobat. In Windows XP and Windows Vista, Acrobat supports TWAIN scanner drivers and Windows Image Acquisition (WIA) drivers. You can also scan paper forms in a way that converts them into interactive PDF forms.

In Windows, when you create a PDF from a scanner, you can choose a scanning preset that best matches the type of document you are scanning. (The available presets are Black & White Document, Grayscale Document, Color Document, and Color Image). You can also scan using custom settings, and you can adjust the settings in the scanning presets.

Note: Preset scanning is available only for scanner drivers that support Hide Scanner's Native Interface mode. The scanning presets are not available in Mac OS.

In Windows, if a WIA driver is installed for your scanner, you can use the Scan button on your scanner to create a PDF. Press the Scan button, and then in Windows, choose Adobe Acrobat from the list of registered applications. Then, in the Acrobat Scan dialog box, select a scanner and a document preset or Custom Scan.

Scan a paper document to PDF using a preset (Windows)

1. Choose File > Create PDF > From Scanner > [document preset].
2. If prompted to scan more pages, select Scan More Pages or Scan Is Complete, and click OK.

Scan a paper document to PDF without presets

1. In Acrobat, do one of the following:
 - (Windows) Choose File > Create PDF > From Scanner > Custom Scan.
 - (Mac OS) Choose File > Create PDF > From Scanner.
2. Select scanning options in the Scan dialog box, as needed, and then click Scan.

Note: If you specify that you want to use the native scanner user interface instead of the Acrobat user interface, other windows or dialog boxes appear. Consult the scanner documentation information on available options. In Mac OS, the scanner user interface is always shown.

3. If prompted to scan more pages, select Scan More Pages or Scan Is Complete, and click OK.

Optimize a scanned PDF

1. Open a PDF created from a scanned document.
2. Choose Document > Optimize Scanned PDF.
3. Select options in the dialog box, and click OK.

The options available in the Optimized Scanned PDF dialog box also appear in the Optimization Options dialog box, which are described in detail under that heading in this topic.

Configure scanning presets (Windows)

1. Choose File > Create PDF > From Scanner > Configure Presets.
2. In the Configure Presets dialog box, select a preset: Black & White Document, Grayscale Document, Color Document, or Color Image.
3. Adjust the settings as needed.
4. Click Save to save the preset, and then click OK.

Scanning options

Scanner

Select an installed scanner. You must have the manufacturer scanning software installed on your computer. In Windows only, click the Options button to specify scanner options.

Sides

Specify single or double-sided scanning. If you select Both Sides and the settings of the scanner are for only one side, the scanner setting overrides the Acrobat settings.

Note: You can scan both sides of pages even on scanners that do not themselves support two-sided scanning. When Both Sides is selected, a dialog box appears after the first sides are scanned. You can then reverse the original paper documents in the tray, and select the Scan Reverse Side (Put Reverse Of Sheets) option in that dialog box. This method produces a PDF with all pages in the proper sequence.

Color Mode (Windows only)

Select a basic color mode (Color, Black and White, or Grayscale) supported by your scanner. This option is enabled if your Scanner Options are set to use the Acrobat scanning dialog box instead of the scanner application.

For e-filing, text documents are scanned in Black and White.

Resolution (Windows only)

Select a resolution supported by your scanner. This option is enabled if your Scanner Options are set to use the Acrobat scanning dialog box instead of the scanner application.

Note: If you select a Color Mode or Resolution option not supported by your scanner, a message appears and your scanner application window opens. Select different options in the scanner application window.

For e-filing, recommended resolution is 200 dpi.

Paper Size (Windows only)

Select a paper size or specify a custom width and height.

For e-filing, the paper size should match your original.

Prompt For Scanning More Pages

When selected, a dialog box prompting you to scan additional pages appears after scanning every page.

New PDF Document

Creates a new PDF. This option is not available in the Configure Presets dialog box.

Multiple Files

Creates multiple files from multiple paper documents. Click More Options, and specify whether to create a PDF Portfolio of the files, the number of pages for each file, and a filename prefix. These options are not available in the Configure Presets dialog box.

Append To Existing File Or Portfolio

Adds the converted scan to an existing PDF or PDF Portfolio. This option is not available in the Configure Presets dialog box.

Small Size/High Quality

Drag the slider to set the balance point between file size and quality. Click Options to customize optimization with specific settings for file compression and filtering.

Make Searchable (Run OCR)

Select this option to convert text images in the PDF to searchable and selectable text. This option applies optical character recognition (OCR) and font and page recognition to the text images and converts them to normal text. When selected, this option also adds tags to the document, which improves accessibility for disabled users. Click Options to specify settings in the Recognize Text - Settings dialog box. See [Recognize text in scanned documents](#).

Make PDF/A Compliant

Select this option to make the PDF conform to ISO standards for PDF/A-1b. When selected, only Searchable Image (Exact) is available in the Recognize Text - Settings dialog box for the PDF Output Style option.

Add Metadata

When selected, the Document Properties dialog box appears after scanning. In the Document Properties dialog box, you can add metadata, or information about the scanned document, to the PDF file. If you are creating multiple files, you can enter common metadata for all of the files.

Scanner Options dialog box

Data Transfer Method

Native Mode transfers in the default mode for your scanner. Memory Mode is automatically selected for scanning in resolutions over 600 dots per inch (dpi).

User Interface

The Hide Scanner's Native Interface option bypasses the windows and dialog boxes provided by the scanner manufacturer. Instead, scanning from Acrobat opens the Custom Scan dialog box.

Invert Black And White Images

This option creates positive images from black-and-white negatives, for example.

Optimization Options dialog box

The Optimization Options dialog box for image settings controls how scanned images are filtered and compressed for the PDF. Default settings are suitable for a wide range of document pages, but you may want to customize settings for higher-quality images, smaller file sizes, or scanning issues.

Automatic

Applies default settings to balance file size and quality at a moderate level.

Aggressive

Applies settings that minimize file size. In some cases, selecting this option may visibly affect the quality of the scanned PDF.

Custom Settings

Makes additional settings available under Compression and Filtering and disables the Aggressive setting under Automatic. If you select Custom Settings, the Color/Grayscale or Monochrome settings are available, depending on the option you selected in the Acrobat Scan dialog box.

Color/Grayscale settings

When scanning color or grayscale pages, select one of the following:

Lossless

Does not apply compression or filters—such as Deskew, Background Removal, and so forth—to scanned pages.

Adaptive

Divides each page into black-and-white, grayscale, and color regions and chooses a representation that preserves appearance while highly compressing each type of content. The recommended scanning resolutions are 300 dots per inch (dpi) for grayscale and RGB input, or 600 dpi for black-and-white input.

JPEG

Applies JPEG compression to the entire grayscale or RGB input page.

Note: The scanner uses either the selected Color/Grayscale option or the selected Monochrome option. Which one is used depends on the settings you select in the Acrobat Scan dialog box or in the scanner's TWAIN interface, which may open after you click Scan in the Acrobat Scan dialog box. (By default, the scanner application dialog box does not open.)

Monochrome

When scanning black-and-white or monotone images, select one of the following:

JBIG2

Applies the JBIG2 compression method to black-and-white input pages. Settings of 0.95 or higher use the lossless method; at lower settings, text is highly compressed. Text pages typically are 60% smaller than CCITT Group 4 compressed pages, but processing is slow. Compatible with Acrobat 5.0 (PDF 1.4) and later.

Note: For compatibility with Acrobat 4.0, use a compression method other than JBIG2.

Adaptive

(As described under Color/Grayscale settings.)

CCITT Group 4

Applies CCITT Group 4 compression to black-and-white input page images. This fast, lossless compression method is compatible with Acrobat 3.0 (PDF 1.2) and later.

Deskew

Rotates any page that is not square with the sides of the scanner bed, to make the PDF page align vertically. Choose Automatic or Off.

Background Removal

Whitens nearly white areas of grayscale and color input (not black-and-white input).



For best results, calibrate your scanner's contrast and brightness settings so that a scan of a normal black-and-white page has dark gray or black text and a white background. Then, Off or Low should produce good results. If scanning off-white paper or newsprint, use Medium or High to clean up the page.

Edge Shadow Removal

Removes dark streaks that occur at the edges of scanned pages, where the paper edge shadows the scanner light. Choose Off, Cautious, or Aggressive.

Despeckle

Removes isolated black marks in black-and-white page content. Low uses a basic peephole filter. Medium and High use both a peephole filter and a large area filter that removes larger spots farther from nearby features.

Descreen

Removes halftone dot structure, which can reduce JPEG compression, cause moire patterns, and make text difficult to recognize. Suitable for 200–400-dpi grayscale or RGB input or, for Adaptive compression, 400–600-dpi black-and-white input. The Automatic setting (recommended) applies the filter for 300 dpi or higher grayscale and RGB input. Select Off when scanning a page with no pictures or filled areas, or when scanning at a resolution higher than the effective range.

Halo Removal

When On (recommended), removes excess color at high-contrast edges, which may have been introduced during either printing or scanning. This filter is used only on color input pages.