How to prepare and organize files for a PDF Portfolio

There is a difference between a PDF Portfolio and a PDF document. A PDF Portfolio is a container for documents, but it isn't a document itself. Each of these enhancements must be made in each document contained in a PDF Portfolio.

With a PDF document, you can:

- Attach sticky notes to the document
- Create links from one part of a document to another
- Create links to external websites
- Add bookmarks to a document
- Add video, audio, and Flash movies to a PDF
- Manage reader rights for viewers with Acrobat Reader

Although you can also make many more enhancements, we will cover these main ones that will help you prepare the documents for PDF Portfolios. For other enhancements, see Acrobat online help for more information or visit the Acrobat in Education blog at http://blogs.adobe.com/acrobatineducation/.

Converting files to PDF format

You create a PDF by converting other documents and resources to Portable Document Format. You can usually choose from several PDF creation methods, depending on the type of file you start with and your requirements for the PDF.

There are a number of ways to create PDFs. For instance, if a file is open in its authoring application (such as a spreadsheet that is open in Microsoft Excel), you can usually convert the file to PDF without starting Acrobat. However, every PDF strikes a balance between efficiency (small file size) and quality (such as resolution and color). When that balance is critical to your task, you'll want to convert the files by using Acrobat, because that method includes access to various conversion options.

To convert a file to PDF:

1. In Adobe Acrobat 9 Pro, do one of the following:
   - Choose File > Create PDF > From File.
   - In the toolbar, click the Create button and choose PDF From File.
2. In the Open dialog box (**Figure 1**), select the file.

   You can browse all file types or select a specific type from the Files Of Type menu (Windows) or Show menu (Mac OS).

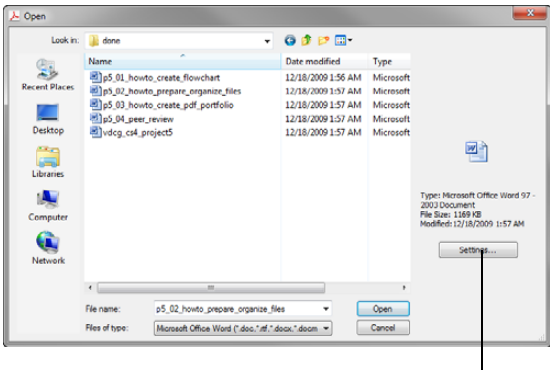

Figure 1 Open dialog box

3. Optionally, click Settings to change the conversion options.

   The options available vary, depending on the file type, and include such settings as adding bookmarks automatically, implementing security settings, and managing color or compression.

   Note: The Settings button is unavailable if you choose All Files as the file type or if no conversion settings are available for the selected file type.

4. Click Open to convert the file to a PDF.

   Depending on the type of file you are converting, the authoring application starts automatically or a progress dialog box appears. If the file is in an unsupported format, a message appears telling you the file cannot be converted to PDF.

5. When the new PDF opens, choose File > Save or choose File > Save As. Then select a name and location for the PDF.

   When naming a PDF that's intended for distribution via the web or e-mail, consider limiting the filename to eight characters (with no spaces) and include the .pdf extension. This ensures that email programs or network servers don't truncate the filename and that the PDF opens as expected.

Converting Web pages to PDF format

You can include web-based materials in a portfolio. You can use Acrobat to link to web pages or capture them and convert them into a PDF for viewing offline. When you convert a web page to PDF, the HTML file and all associated files—such as JPEG images, Adobe Flash files, cascading style sheets, text files, image maps, and forms—are included in the conversion process.

The resulting PDF behaves much like the original web page. For example, the images, links, image maps, and most media files appear and function normally within the PDF. (Animated GIF files appear as still images, showing the last frame of the animation.)

In preparing to convert web pages to PDF, consider the following factors, which affect how you approach the conversion process:

- How much do you want to convert? If you want to convert several levels or all of a multipage website to PDF, work within Acrobat.
- Do you want to create a new PDF from the web pages or to append the converted pages to an existing PDF? You can do both in either Acrobat or Internet Explorer, but you choose different buttons or commands to accomplish these things.
- How complicated is the web page? Some web pages display differently in different browsers, and a web page that uses unconventional code or media may not convert the way you expect it to. If you have difficulty converting a particular web page to PDF, consider linking to the web page instead (see "Creating links in a PDF document").

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Here's how to use Acrobat to convert one or more pages from a website into a PDF.

To convert a web page to PDF:

1. Choose File > Create PDF > From Web Page.
2. In the Create PDF From Web Page dialog box (**Figure 2**), enter the complete path to the web page or click Browse and locate an HTML file.
3. To change the number of levels in the website to convert (that is, the depth of links Acrobat should follow), expand Capture Multiple Levels. Enter the number of levels to include, or select Get Entire Site to include all levels from the website.

   Note: Some websites have hundreds or even thousands of pages. Converting a large website can make your system slow and unresponsive and can even use up available hard-drive space and memory, causing a system crash. A good idea is to begin by downloading one level of pages and then go through them to find particular links to download.
4. If Get Only N Level(s) is selected, select one or both of the following options:
   - *Stay On Same Path:* Downloads only web pages subordinate to the specified URL. Select this option if you want to capture only a particular section of a website.
   - *Stay On Same Server:* Downloads only web pages stored on the same server. Select this option if you want to avoid capturing web pages from other websites. your target website links to.
5. Click Settings, change the selected options in the Web Page Conversion Settings dialog box as needed (typically you can use the default settings), and click OK.
6. Click Create.

   Note: You can view PDF pages while they are downloading; however, you cannot modify a page until the download process is complete.
7. If you closed the Download Status dialog box, choose Advanced > Web Capture > Bring Status Dialogs To Foreground to see the dialog box again.

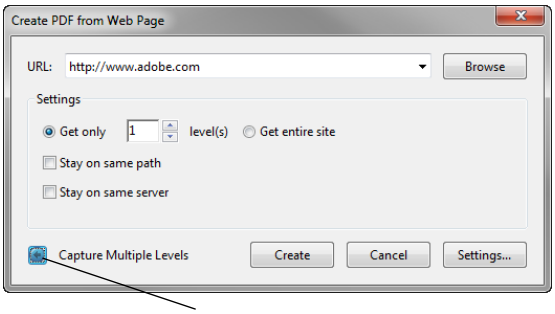

Figure 2 Create PDF From Web Page dialog box

Adding media to a PDF document

Inserting a media file into a *PDF document* has different results than adding media files directly to a *PDF Portfolio*.

The advantage to placing a video or audio file in a PDF document is that Acrobat converts the file to a format that can be played by Reader. This conversion process greatly reduces the file size of the PDF Portfolio that includes this document compared to adding the file in its original format, and anyone with Reader can view and/or hear the media without additional software.

However, when such files are placed directly into a PDF Portfolio, they are not converted. To view the files, viewers must have whatever application was used to create them; choose this option if you want viewers to have access to the original file format. The original files retain their individual identities but are still part of the one PDF Portfolio file. Viewers can open, read, edit, and format each component file independent of the other component files in the PDF Portfolio (provided they have the native applications that created those files).

PDFs can include Flash, QuickTime, MP3, MPEG, and Windows Media files, among others. You can play these files directly from the page or activate them from a link or a bookmark. Each multimedia file includes a play area from which you can activate the media. The play area typically appears on the PDF page as an image or a rectangle but can also be invisible.

Any computer that has Adobe Reader 9 can play these files:

- Media files created in Flash (FLV format)
- Media files that comply with the H.264 standard for video compressions

Media files in other formats require the necessary hardware and software to play.

When you add a media file to a PDF document, Acrobat Pro Extended automatically converts video to FLV files. This format ensures both high-quality viewing and compatibility across computer platforms. FLV files are also compact, so converting multimedia to this format helps reduce the size of multimedia PDFs. Acrobat converts the following file formats to FLV format: ASF, ASX, AVI, 3GPP, MOV, MP4, MPEG, MPG, QT, and WMV files. MP3 audio files can also be added to a PDF for playback on any platform.

Note: All multimedia developed in Adobe Flash® and any multimedia that is H.264 compliant can be played back in Adobe Reader® 9 and later. (H.264, also known as MPEG-4 part 10, is a video compression standard that provides high-quality video without substantially increasing file size.) Video files of varying formats and filename extensions can be H.264 compliant.

To add video to a PDF document:

1. Open the PDF document.

   If the document is in a PDF Portfolio, right-click (Windows) or Control-click (Mac OS) the document and choose Open. Double-clicking a document in a PDF Portfolio allows you to preview (rather than open) the document. You will not be able to proceed with this activity in a previewed document.

2. Choose Tools > Multimedia > Video Tool.

3. Drag or double-click to select the area on the page where you want the video to appear.

   The Insert Video dialog box appears (**Figure 3**).

   If you double-click the page, Acrobat places the upper-left corner of the video where you clicked. If you drag an area on the page, the media is placed within the area. The play area of the video is the exact size of the video frame (if Acrobat is able to read the video clip dimensions).

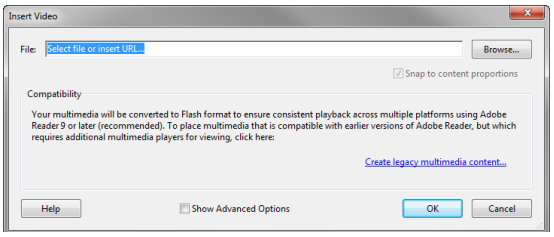

Figure 3 Insert Video dialog box

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4. Insert a URL in the File text box, or click Browse (Windows) or Choose (Mac OS) to find the video file.

   For URLs, use the full file address, including the video filename extension, such as .flv or .mp4.

5. (Optional) To specify which playback controls will be displayed for the video, select Show Advanced Options. Then select the Controls tab. In the Skin menu, select which set of controls to use.

6. (Optional) To select an image to be displayed when the video isn't playing, select Show Advanced Options. Then select the Video tab. Move the marker above the slider bar to the frame you want to use, and then click Set Poster Image From Current Frame.

7. Click OK to close the Insert Video dialog box.

   The video may take a few seconds to process before it appears in the location you specified.

8. To play the video, use the Hand tool or the Select tool to click the play area of the video file. When the pointer is positioned over the play area, it changes to the play mode icon .

To add Flash to a PDF document:

1. Open the PDF document.

   If the document is in a PDF Portfolio, right-click (Windows) or Control-click (Mac OS) the document and choose Open. Double-clicking a document in a PDF Portfolio allows you to preview (rather than open) the document. You will not be able to proceed with this activity in a previewed document.

2. Choose Tools > Multimedia > Flash Tool.

3. Drag or double-click to select the area on the page where you want the Flash movie to appear.

   The Insert Flash dialog box appears (**Figure 4**).

   If you double-click the page, Acrobat places the upper left corner of the video where you clicked. If you drag an area on the page, the media is placed within the area. The play area of the movie is the exact size of the video frame (if Acrobat is able to read the video clip dimensions).

4. Insert a URL in the File text box, or click Browse to find the Flash movie file, and then click Open.

   For URLs, use the full file address, including the filename extension.

5. Click OK.

   The movie appears in the PDF document.

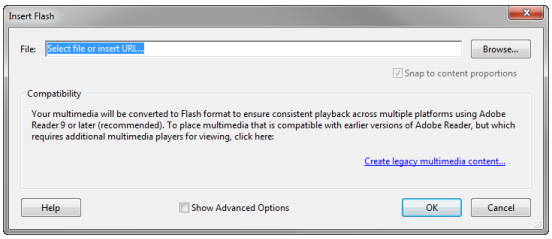

Figure 4 Insert Flash dialog box

6. (Optional) To specify advanced options (such as whether to display a border around the movie or make the movie's background transparent), select Show Advanced Options.
7. To play the movie, use the Hand tool or the Select tool to click the play area of the video or sound file. When the pointer is positioned over the play area, it changes to the play mode icon.

To add sound to a PDF document:

1. Open the PDF document.

   If the document is in a PDF Portfolio, right-click (Windows) or Control-click (Mac OS) the document and choose Open. Double-clicking a document in a PDF Portfolio allows you to preview (rather than open) the document. You will not be able to proceed with this activity in a previewed document.
2. Choose Tools > Multimedia > Sound Tool.
3. Drag or double-click to select the area on the page where you want to place the sound.

   The Insert Sound dialog box appears (**Figure 5**).

   If you double-click the page, Acrobat places the upper left corner of the sound play area where you clicked. If you drag an area on the page, the media is placed within the area.
4. Insert a URL in the File text box, or click Browse to find the media file, and then click Open.

   For URLs, use the full file address, including the filename extension.
5. (Optional) To specify advanced options (such as what image, or "poster," to display in the sound play area), select Show Advanced Options.
6. Click OK.

   A play area representing the sound appears in the PDF document.
7. To play the audio, use the Hand tool or the Select tool to click the sound play area. When the pointer is positioned over the play area, it changes to the play mode icon.

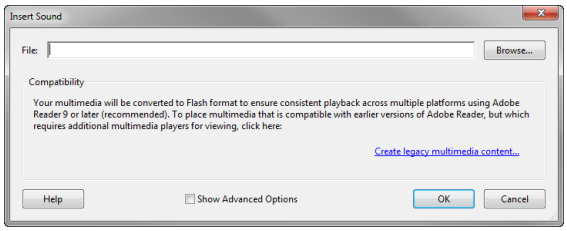

Figure 5 Insert Sound dialog box

Note: Converted media require Adobe Reader 9 or Acrobat 9 for playback. Viewers who attempt to play converted media in earlier versions of Adobe Reader or Acrobat are prompted to upgrade to Adobe Reader 9 or Acrobat 9.

Note: You can delete or move media that has been inserted. Choose the media tool for that type of media again and move or delete the embedded media.

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Managing reader rights

You may wish to create a portfolio that allows viewers to comment and respond to its contents. If you enable commenting rights in a PDF, peers can offer feedback even if they do not have a copy of Adobe Acrobat. Enabling these rights allows viewers using Adobe Reader 8 or later to participate in reviews of that PDF. When a PDF with commenting rights opens in Reader, it includes a document message bar and commenting tools that are otherwise unavailable.

To enable commenting rights, open the PDF and choose Comments > Enable For Commenting And Analysis In Adobe Reader.

Note: If you enable commenting for Reader in a digitally signed document, the signature is invalidated.

Adding bookmarks to a document

Bookmarks are navigational links—located in the Bookmarks panel in the navigation pane of Adobe Acrobat 9—that display specific document pages when clicked. You can also set up bookmarks to link to other documents (not only PDFs) and to web pages. Organized in a hierarchy, bookmarks display the organizational structure of a document for readers (**Figure 6**).

When you export PDFs from some programs, Acrobat creates bookmarks automatically. You can also create them by using the Adobe Acrobat 9 interface.

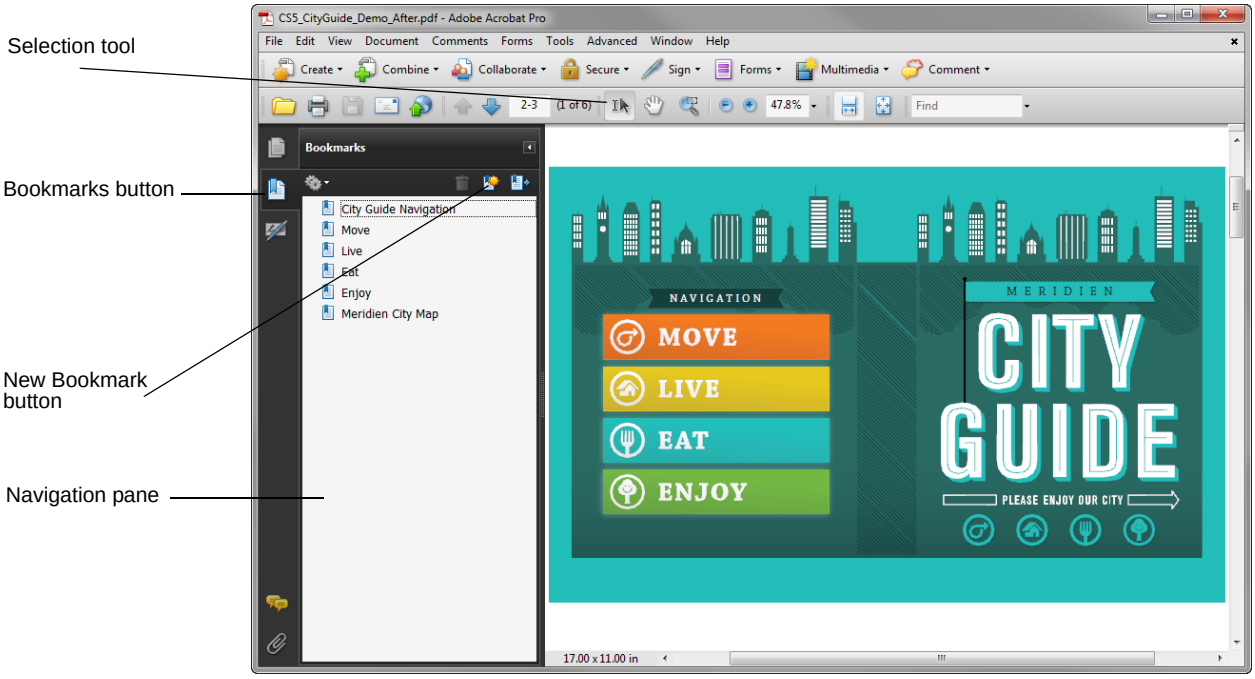

Figure 6 Bookmarks in a document

Initially, a bookmark displays the page that was in view when the bookmark was created, which is the bookmark's destination. In Acrobat, you can set bookmark destinations as you create each bookmark. However, it is sometimes easier to create a group of bookmarks and then set the destinations later.

To create a bookmark:

1. Open the page where you want the bookmark to link to, and click the Bookmarks button to view the existing bookmarks in the document (**Figure 6**).

2. Use the Select tool to create the bookmark:
   - To bookmark a single image, click in the image, or drag a rectangle around the image.
   - To bookmark a portion of an image, drag a rectangle around the portion.
   - To bookmark selected text, drag to select it. The selected text will be the label of the new bookmark (**Figure 7**).
3. In the Bookmarks panel, click the New Bookmark button (**Figure 8**).

   The new bookmark is added to the bookmarks list.

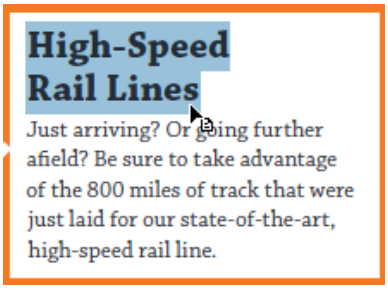

Figure 7 Select text to create a new bookmark.

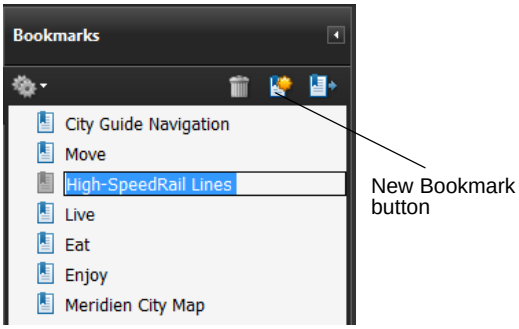

Figure 8 New Bookmark button and editable label

To rename a bookmark:

1. Do one of the following:
   - Double-click the bookmark you want to rename in the Bookmarks panel.
   - Click the bookmark and select Rename Bookmark from the options menu.
2. Type a new name and press Enter (Windows) or Return (Mac OS) (**Figure 9**).

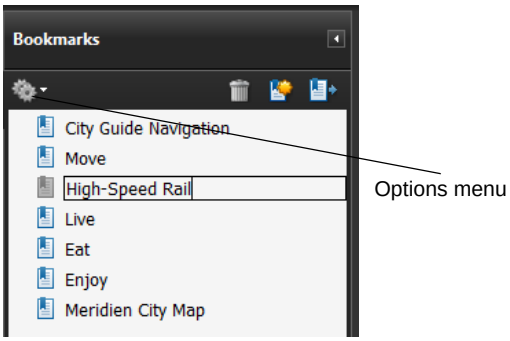

Figure 9 Renaming a bookmark

To delete a bookmark:

1. Select the bookmark or range of bookmarks you want to delete.

   Note: To select multiple book marks, hold down Control (Windows) or Command (Mac OS).
2. Select Delete Bookmark(s) from the options menu or press Delete on the keyboard.

   Deleting a bookmark deletes all child bookmarks but does not delete any document text.

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To change a bookmark's destination:

1. In the Bookmarks panel of the navigation pane, select the bookmark for which you want to change the destination.
2. Using the Select tool, select the new bookmark location in the document.
3. With the new text selected in the document, select Set Bookmark Destination from the options menu in the Bookmarks panel (**Figure 10**).
4. Select Yes when the message appears asking you to confirm the change.

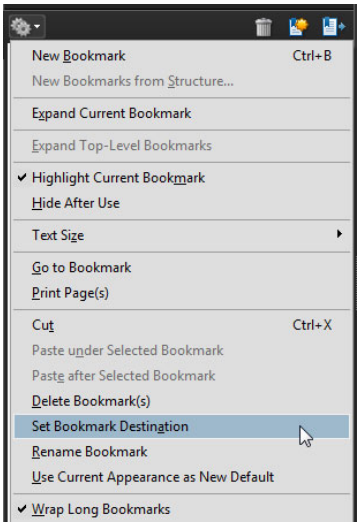

Figure 10 Options menu

Adjusting the appearance of a bookmark

You can change the size, color, and style of a bookmark and wrap the text of long bookmarks in the navigation pane.

To change the text size of all bookmarks:

1. Display the Bookmarks panel in the navigation pane.
2. Select Text Size from the options menu and select a text size for the bookmarks (**Figure 11**).

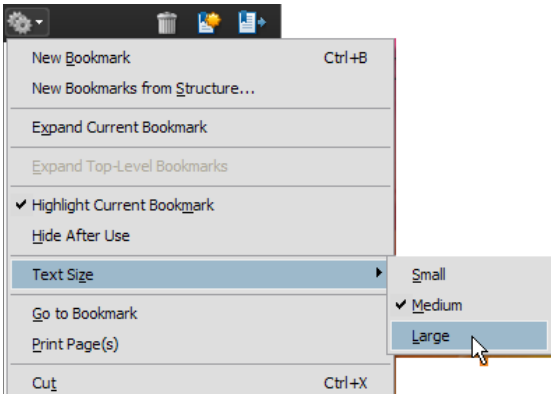

Figure 11 Options menu

To change the text style and color of selected bookmarks:

1. Display the Bookmarks panel in the navigation pane.
2. Select a bookmark or range of bookmarks and select Properties from the options menu.

   The Bookmark Properties dialog box appears (**Figure 12**).
3. Click the Appearance tab.
4. Select a style and color for the bookmark text.
5. Click OK.

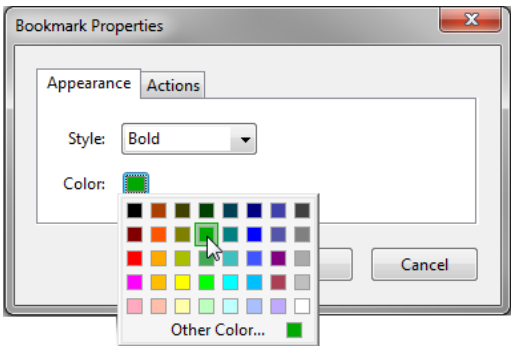

Figure 12 Bookmark Properties dialog box

To wrap the text of long bookmarks:

1. Display the Bookmarks panel in the navigation pane.
2. Select Wrap Long Bookmarks from the options menu.

   The full text of long bookmarks will now be displayed, regardless of the width of the navigation pane.

Organizing the structure of bookmarks

You can easily move bookmarks around in the Bookmark panel by dragging and realeasing. An arrow and dotted line indicate the destination of the bookmark. Organizing bookmarks is useful in the case of nested bookmarks which can be used to create a logical topic structure that helps readers navigate a document. Nesting creates a parent/child relationship that can also be expanded and collapsed to show more or less of the hierarchical structure.

To nest one or more bookmarks under another bookmark:

1. Select the bookmark or range of bookmarks you want to nest.
2. Drag the bookmark icon(s) below and to the right of the parent bookmark icon.

   A line appears to show where the bookmark(s) will go (**Figure 13**).
3. Release the mouse button to nest the bookmark(s) at the new location.
4. If you find it difficult to nest bookmarks by dragging:
   - Select the bookmark or bookmarks you want to nest and select Cut from the options menu.
   - Click the bookmark you want to make the parent of the cut bookmark(s), and select Paste Under Selected Bookmark from the options menu.

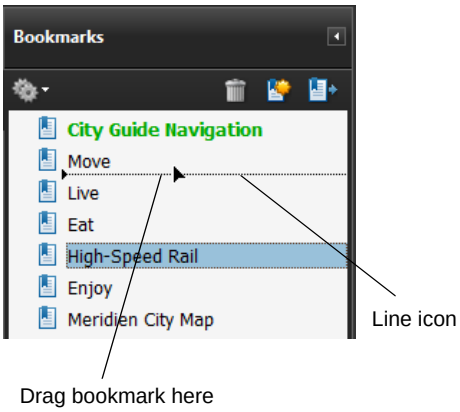

Figure 13 Nested bookmark

Creating links in a PDF document

Links in a PDF document can be visible or invisible and can have one or more actions associated with them. They can be linked to initiate actions such as playing multimedia, accessing the web, reading articles, showing and hiding comments, and performing menu commands.

You can link from one part of a PDF document to another part of the same document. You can also use the same method to link one PDF document to another PDF document in the same PDF Portfolio.

To link from one page in a PDF document to another or link from one document to another in the PDF Portfolio:

1. If you have created a PDF Portfolio, you can create a link from one document to another document in the PDF Portfolio. Make sure both the PDF document you want to link from and the PDF document you want to link to are in the PDF Portfolio.
2. In the PDF Portfolio, open the document that will contain the link.

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3. Choose Tools > Advanced Editing > Link Tool.

   The pointer changes to a cross hair.

4. Draw a rectangle around the text or object you want viewers to click to activate your link.

   The Create Link dialog box appears (**Figure 14**), showing the properties you can assign to the link.

5. Use the Link Appearance section of the Create Link dialog box to set the appearance of the link.

6. In the Link Action section of the dialog box, select Go To A Page View and click Next.

   The Create Go To View dialog box appears (**Figure 15**).

7. With the Create Go To View dialog box displayed, do one of the following:

   - If you are linking from one page to another page in the same document, navigate to the page you want the link to open.
   - If you are linking from one document to another document, navigate to the document you want the link to open, using the PDF Portfolio navigational controls or the scroll bars and mouse.
   - If you want the link to open a page other than the first page of the document, navigate to that page in the document.

8. Use the zoom controls to set the zoom level of the document that viewers see when they open the document.

9. In the Create Go To View dialog box, click Set Link.

10. To test the link, choose Tools > Select & Zoom > Select Tool. Then click the link.

11. To change the appearance or behavior of the link, choose Tools > Advanced Editing > Link Tool. Then double-click the link and change the link settings in the Link Properties dialog box.

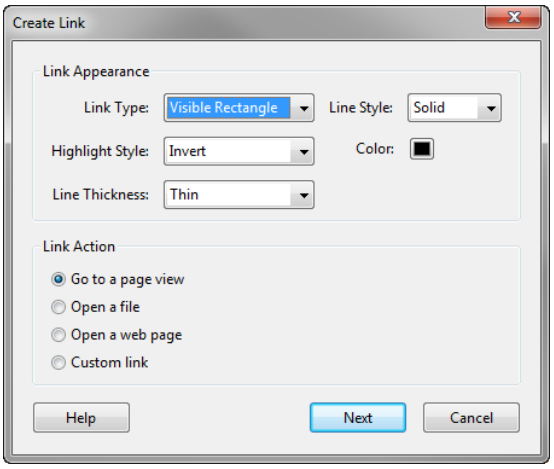

Figure 14 Create Link dialog box

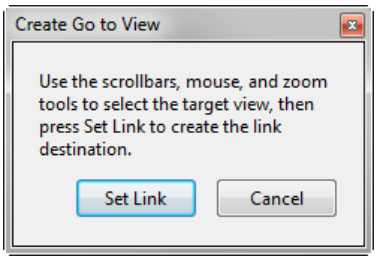

Figure 15 Create Go To View dialog box

You can also use the Link tool to create links that direct your viewer to web-based resources.

To link to an external site:

1. Open the document that will contain the link.

2. Choose Tools > Advanced Editing > Link Tool.

   The pointer changes to a cross hair.

3. Draw a rectangle around the text or object you want viewers to click to activate your link.

   The Create Link dialog box appears (**Figure 14**), showing the properties that can be assigned to the link.

4. Use the Link Appearance section of the Create Link dialog box to set the appearance of the link.

5. In the Link Action section of the dialog box, select Open A Web Page and click Next.

   The Edit URL dialog box appears (**Figure 16**).

6. In the Edit URL dialog box, enter the web address of the web page or website you want the link to open. Then click OK.

7. To test the link, choose Tools > Select & Zoom > Select Tool. Then click the link.

8. To change the appearance or behavior of the link, choose Tools > Advanced Editing > Link Tool. Then double-click the link and change the link settings in the Link Properties dialog box.

Figure 16 Edit URL dialog box

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