How to create and personalize a PDF Portfolio

A PDF Portfolio contains multiple files assembled into an integrated PDF unit. The files in a PDF Portfolio can be in different formats and created in different applications. For example, suppose you have a project that includes text documents, email messages, spreadsheets, CAD drawings, and PowerPoint presentations. You could combine all of these documents into a PDF Portfolio. The original files retain their individual identities but are assembled into one PDF Portfolio file. Users can open, read, edit, and format each component file independently of the other component files in the PDF Portfolio.

Creating and organizing a PDF Portfolio is a simple process—as simple as dragging and dropping files from one folder to another.

To drag files into an empty PDF Portfolio:

1. Start Adobe Acrobat 9 Pro.
2. Select File > Create PDF Portfolio.

   The PDF Portfolio work area appears (**Figure 1**).
3. From the open PDF Portfolio, do one of the following:
   - Choose File > Modify PDF Portfolio > Add Files, and select one or more files.
   - Choose File > Modify PDF Portfolio > Add Existing Folder, and select a folder.
   - On the desktop or from a folder, drag any files or folders into the PDF Portfolio work area.

   The documents or folders you included appear in the PDF Portfolio work area (**Figure 2**).

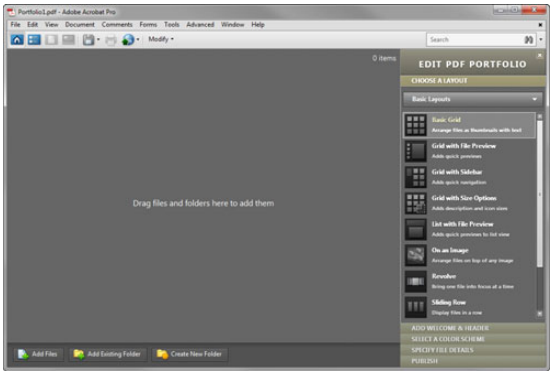

Figure 1 PDF Portfolio work area

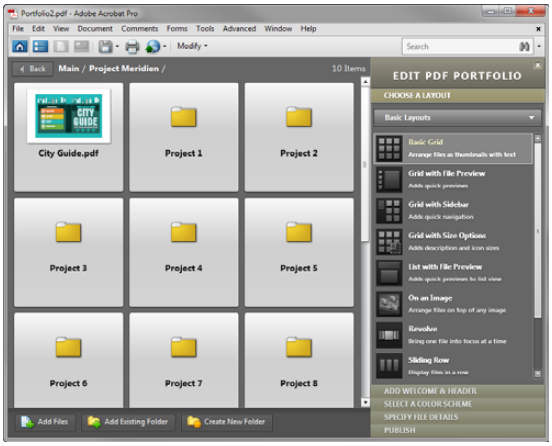

Figure 2 Documents and folders in the PDF Portfolio work area

As viewers drill down into the folder hierarchy, Acrobat automatically builds breadcrumb trails to help keep track of where they are in the PDF Portfolio and help them find their way back up the folder hierarchy (**Figure 3**).

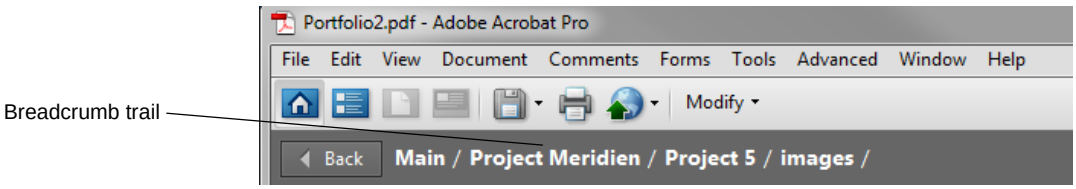

Figure 3 Breadcrumb trail

You can also create folders inside the PDF Portfolio, enabling you to organize (or reorganize) your documents even after they have been added to the PDF Portfolio.

To create a new folder in a PDF Portfolio:

1. Open the PDF Portfolio.
2. From the Modify menu in the PDF Portfolio toolbar, choose Create New Folder (**Figure 4**).

   The New Folder dialog box appears (**Figure 5**).
3. Type a name for the new folder.
4. Click OK.

   The new folder appears in the PDF Portfolio work area. You can add files to the new folder by dragging them either from within the PDF Portfolio or from the computer desktop.

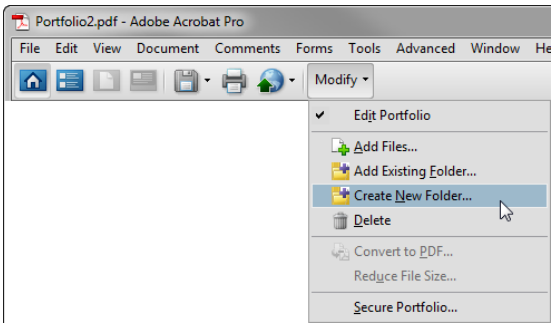

Figure 4 Modify menu in the PDF Portfolio toolbar

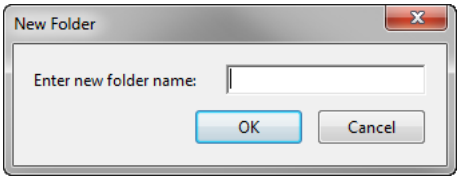

Figure 5 New Folder dialog box

Closing and opening the Edit Portfolio pane

Once you have created a PDF Portfolio, you can switch quickly in and out of editing mode.

To open or close the Edit Portfolio pane:

1. Open the PDF Portfolio.
2. From the Modify menu in the PDF Portfolio toolbar, choose Edit Portfolio (**Figure 6**).

   The Edit Portfolio pane appears on the right side of the workspace.
3. If the Edit Portfolio pane is open, you can close it by choosing Close Edit Portfolio from the Modify menu.

   Keep in mind that anyone with Acrobat can edit any portfolio unless it has been secured with a password. For more about securing a PDF Portfolio, see “Securing the PDF Portfolio.”

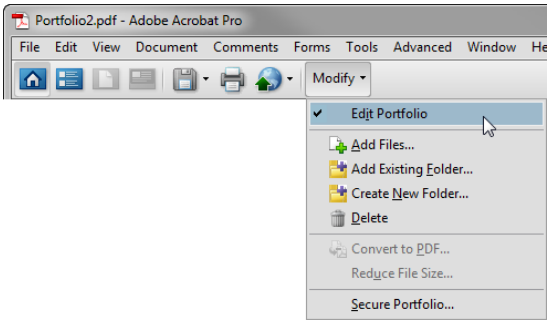

Figure 6 Modify menu in the PDF Portfolio toolbar

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Personalizing a PDF Portfolio

The robust PDF Portfolio features in Acrobat make it easy to create a sophisticated presentation package. When users first open a PDF Portfolio, they see the Edit PDF Portfolio pane on the right side of the PDF Portfolio work area. Every PDF Portfolio can be viewed either in a customizable visual layout or in a list view. First, we will cover creating a visual layout.

In the Edit PDF Portfolio pane, you can quickly customize the appearance of the PDF Portfolio. You can choose:

- A visual layout
- A welcome page
- A color scheme

You can also specify the details to display about the contents of the PDF Portfolio.

To choose a layout for a PDF Portfolio:

1. Open the PDF Portfolio.
2. In the Edit PDF Portfolio pane, open the Choose A Layout section (**Figure 7**).
3. Select one of the basic layout options:
   - *Basic Grid:* Arrange files as thumbnails with text.
   - *On An Image:* Arrange files on top of any image you want. Use the Pick An Image button to select the image to use as a background for your portfolio.
   - *Revolve:* Bring one file into focus at a time.
   - *Sliding Row:* Display several files in a row.

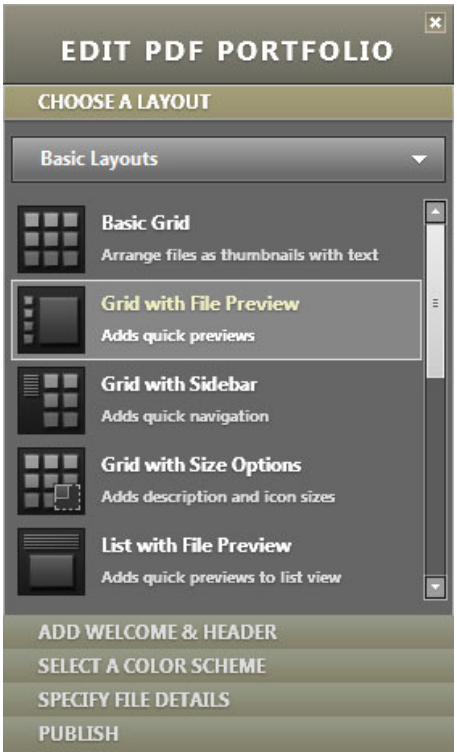

Figure 7 Choose A Layout section

Creating a welcome page

Portfolios posted to the web may be encountered by a variety of people. The welcome page provides context for the audience. It typically provides contact information and other useful details for the audience, such as instructions about what they can find in the portfolio and how to navigate it.

To create a welcome page:

1. In the Edit PDF Portfolio pane, open the Add Welcome & Header section.

   The Add Welcome & Header section has two parts: the Welcome pane and the Header pane. Make sure the Welcome pane is open (**Figure 8**).

2. Select one of the options for the welcome page:
   - *No Welcome Page:* Select this option if you don't want a welcome page or if you want to remove a welcome page you previously added to the PDF Portfolio.
   - *Text Only:* Select this option for text. Acrobat provides a text area with text formatting options such as those found in a word processor.
   - *Image Only:* Select this option to display a single image as your welcome page. Images can be JPG, GIF, or PNG formats. You can control the size and transparency of the image.
   - *Image & Text:* Select this option to combine text and a single image. You can adjust the layout of the image and the text area.
   - *Flash Movie:* Select this option to use a Flash movie as the welcome page.
3. If you selected text for your welcome page, click the text block and type the text you want displayed. Use the text options to format your text.
4. If you selected an image or a Flash movie for your welcome page, click the image object or the Flash movie object and select the file that contains the image or movie that should appear. Use the display options to modify how the object appears.

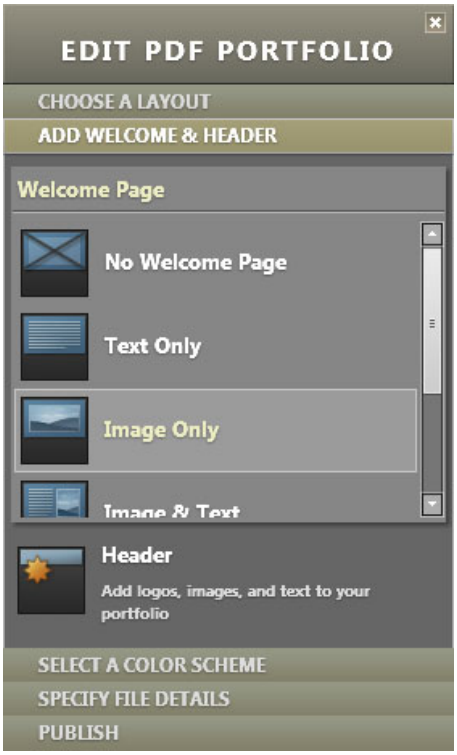

Figure 8 Add Welcome & Header section

Anyone who opens the PDF Portfolio will first see the welcome page, with a Get Started button at the bottom. Viewers click the Get Started button to see the contents of the PDF Portfolio.

Creating headers

A PDF Portfolio header provides a consistent banner (and by extension, a persistent context) over the PDF Portfolio content. You can use the header to give your PDF Portfolio a name, offer contact information, or display images, such as a logo or photograph.

Note: Acrobat also enables you to create headers and footers within a PDF document—such headers appear on every page of the PDF they belong to. However, a PDF Portfolio header is different. The PDF Portfolio header is visible

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when viewers are navigating the PDF Portfolio but not when they have opened one of the documents the PDF Portfolio contains.

To create a header:

1. In the Edit PDF Portfolio pane, open the Add Welcome & Header section.
2. In the Add Welcome & Header section, click Header to open the Header pane (**Figure 9**).
3. Select one of the options for the header:
   - *No Header:* Select this option if you don't want a header or if you want to remove a header you previously added to the e-portfolio.
   - *Simple Text:* Provides a text block you can format by using the text options.
   - *Structured Text:* Provides several text blocks you can format by using the text options, including a text block you can use to provide a linked e-mail address and another (labeled URL text) you can use to provide a linked web address.
   - *Logo & Text:* Displays an image next to the text block in your header.
   - *Logo & Structured Text:* Displays an image next to a structured text block in your header.
   - *Image Only:* Displays an image in your header but no text.
   - *Text & Background Image:* Displays an image behind the text in your header.
4. If you selected text for the header, click the text block and type the text you want displayed. Use the text options to format the text.
5. If you selected an image or a logo for the header, click the image object or the Flash movie object and select the file that contains the image or movie that should appear. Use the display options to modify how the object appears.

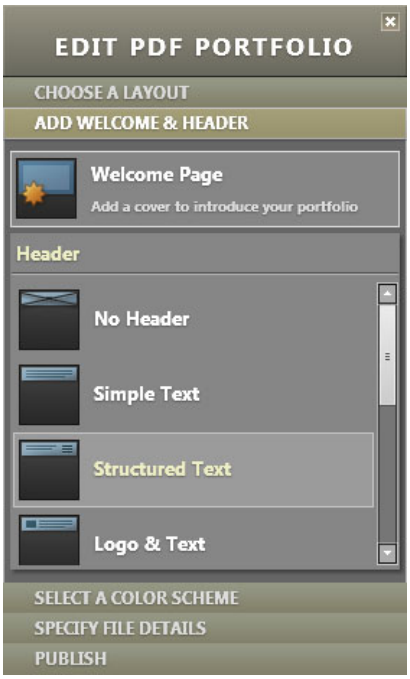

Figure 9 Header pane

The structured text option provides a text field for an e-mail address and another for a web address (the URL text) (**Figure 10**). You can also use the Text Formatting Tools to change the appearance of the text.Acrobat automatically links the information in these fields so viewers can use them to create an e-mail message.

Figure 10 Structured text header

Adding headers or footers to documents

Headers and footers present consistent information in the page margins throughout a PDF. The information could be the name of the project, a date, automatic page numbering, the title of the PDF document, or the name of the author. You can add headers and footers to one or more PDFs, including component PDFs in a PDF Portfolio.

After applying a header and footer, you can edit, replace, or delete them in the PDF. You can also preview headers and footers before applying them and adjust the header and footer margins so they don't overlap other page content.

To add headers or footers to multiple documents in a PDF Portfolio:

1. Open your PDF Portfolio. Select the PDF documents in the PDF Portfolio for which you want to have headers or footers.

   To select multiple documents in a PDF Portfolio, do one of the following:

   - To select a range of documents, click the first document and then Shift-click the last document. All documents between the two are selected.
   - To select individual noncontiguous documents, Ctrl-click (Windows) or Command-click (Mac OS) each document.
   - To deselect an individual document, Ctrl-click (Windows) or Command-click (Mac OS) that document.

2. Choose Document > Header & Footer > Add.

   The Add Header And Footer dialog box appears (**Figure 11**).

3. As needed, specify the Font and Margin values.

   These text properties apply to all header and footer entries that are part of this setting definition. To apply different settings to different documents, open each document individually to add the header and footer, and follow steps 2–6.

   To prevent the new header or footer from overlapping with the content of the PDF document, click the Appearance Options button and select Shrink Document To Avoid Overwriting The Document's Text And Graphics.

4. Type the text in any of the header and footer text boxes.

   - To insert page numbers, click the Insert Page Number button.
   - To insert the current date, click the Insert Page Number button.

   You can combine text with dates and page numbers. You can also add several lines of text to an entry.

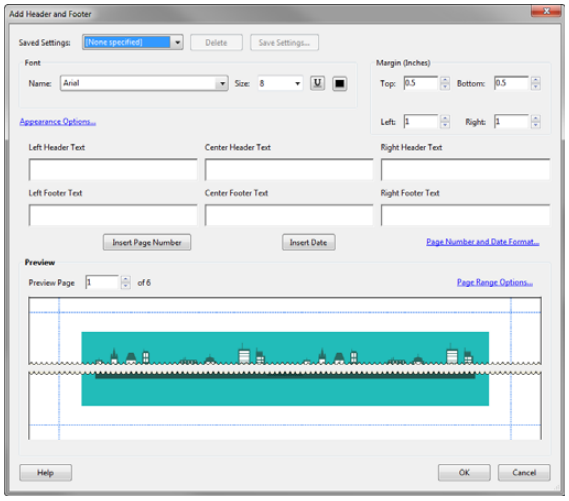

Figure 11 Add Header And Footer dialog box

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5. To specify the pages on which the header and footer appear, click the Page Range Options button. Then specify a page range and choose a Subset option as needed.
6. Examine the results in the Preview area, using the Preview Page option to see various pages of the PDF.
7. Click OK.

   To edit headers or footers, choose Document > Header & Footer > Update. Then make the appropriate edits.

To remove headers or footers:

Do one of the following:

- Open a single PDF, or select one or more component PDFs in a PDF Portfolio. Then choose Document > Header & Footer > Remove.
- To remove headers and footers from multiple PDFs, close any open documents and portfolios. Then choose Document > Header & Footer > Remove. In the dialog box, click Add Files, choose Add Files or Add Open Files, and select the files. Click OK, and then in the Output Options dialog box, specify your folder and filename preferences.

Selecting a color scheme

PDF Portfolios can be personalized by selecting a color scheme. Select one of the preconfigured color schemes provided in Acrobat or create your own customized color scheme. Consider visiting Adobe Kuler at http://kuler.adobe.com/ for additional help with selecting a color scheme.

To select a preset color scheme:

1. In the Edit PDF Portfolio pane, open the Select A Color Scheme section.
2. In the Select A Color Scheme section, click one of the 16 preset color schemes (**Figure 12**).

   Your PDF Portfolio color scheme changes to match the preset colors. Documents remain unaltered by changes to the PDF Portfolio color scheme.

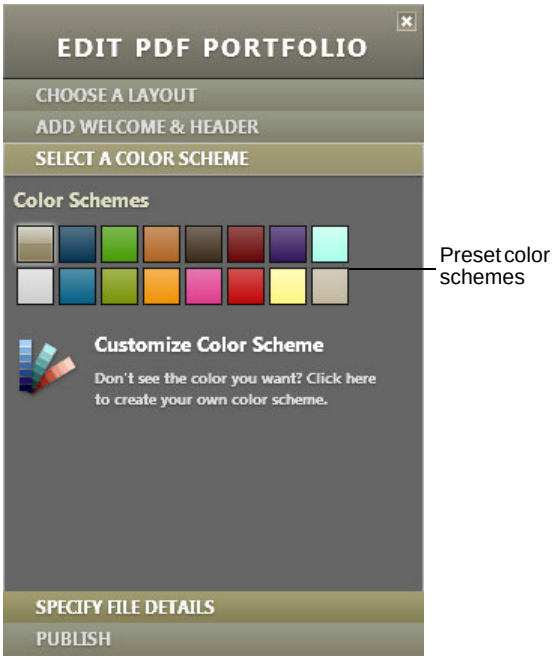

Figure 12 Select A Color Scheme section

To customize a color scheme:

1. In the Edit PDF Portfolio pane, open the Select A Color Scheme section.
2. In the Select A Color Scheme section, click Customize Color Scheme.

   The Customize Color Scheme pane appears (**Figure 13**). It contains a Lightness & Saturation control, a Hue slider, and five color categories.
3. Click one of the color categories. The categories are:
   - *Primary Text Color:* The color used for the names of documents. This color should contrast sharply with both the card color and the secondary card color so document names are easy to read.
   - *Secondary Text Color:* Used for document descriptions and when text is being selected. This color should also provide a comfortable reading contrast with both the card color and the secondary card color.
   - *Background Color:* The primary color of the PDF Portfolio work area.
   - *Card Color:* Cards are blocks that hold documents and folders. Card color refers to the color displayed on these cards when they are not selected.
   - *Secondary Card Color:* The color displayed on cards when they are selected.
4. Drag the Hue slider to select a base color for the category.
5. Click or drag in the Lightness & Saturation control to choose a shade for the color.
6. Repeat steps 3–5 for all of the color categories you wish to change.

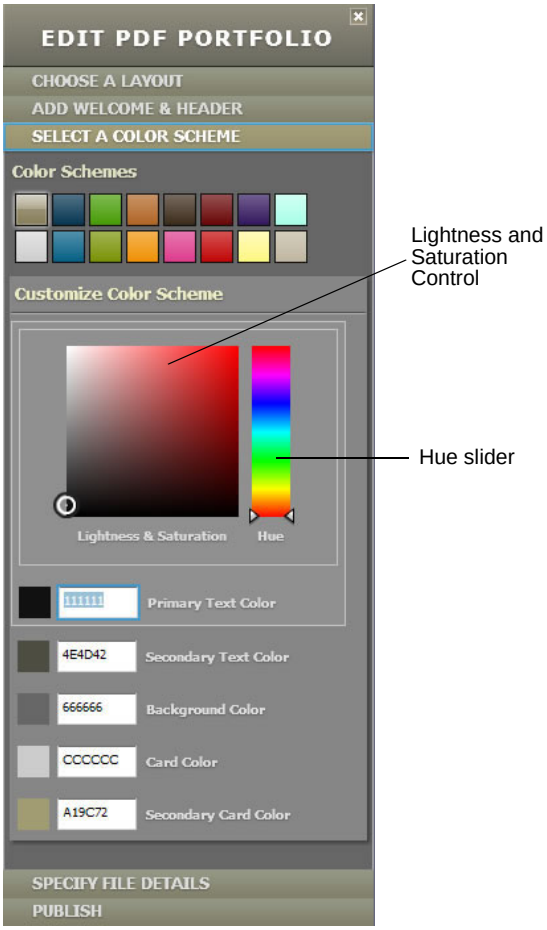

Figure 13 Customize Color Scheme pane

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Using list view

An alternative to a visual layout is list view (**Figure 14**). Acrobat automatically creates a list view for a PDF Portfolio, showing a list of files by name, size, date the file was created and last modified, and any other details the PDF Portfolio author has added to the view. Also, you can add your own columns to list view. For instance, presenting a collection of work by various people involved in a project, you might add a column for authors' names to identify which documents were created by each person.

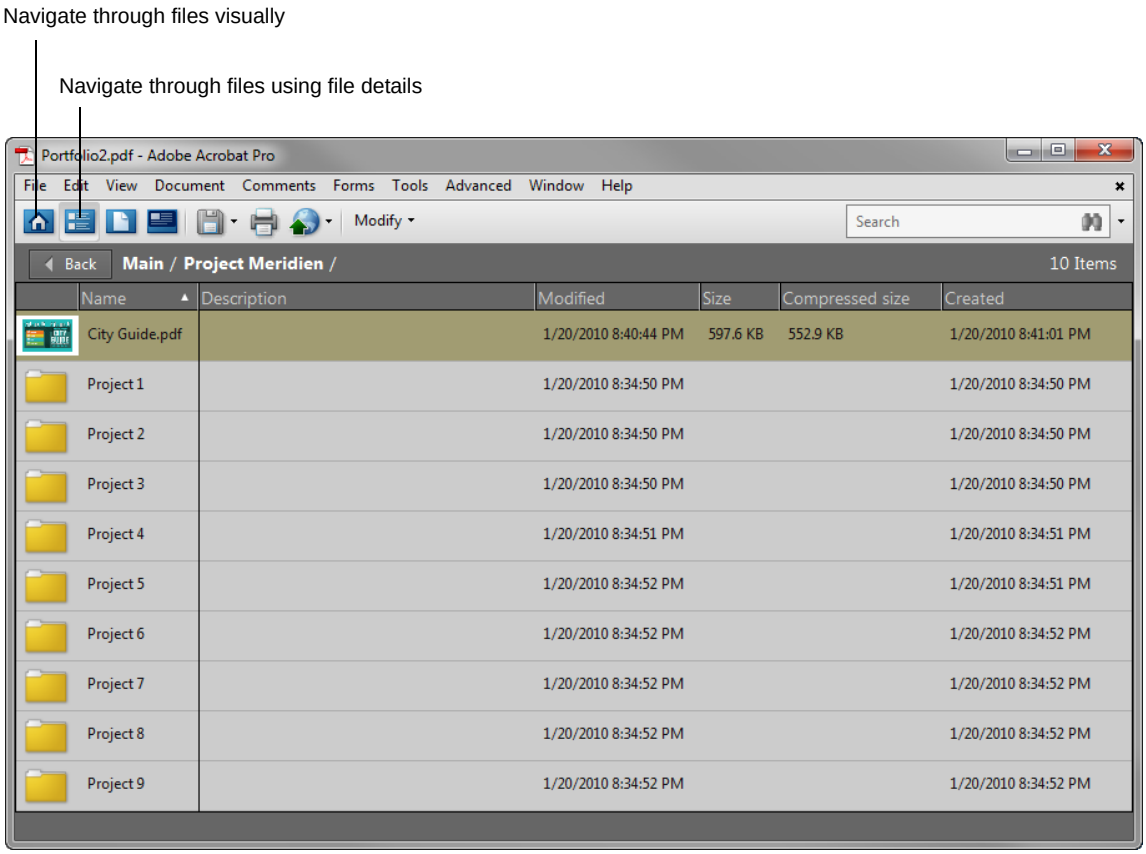

Figure 14 PDF Portfolio in list view

To add a column to list view:

1. In the Edit PDF Portfolio pane, open the Specify File Details section (**Figure 15**).
2. To add a column, click in the Add A Column text box and type a label for the column.
3. In the pop-up menu beside the text bpx, indicate the type of column you want (choices are Text, Number, Date).

   This choice determines the sorting rules for the column.
4. Click the + button to add the column to the list view.
5. In the list of columns to display, make sure the column is selected.

   You can remove columns from list view by deselecting them. You delete them permanently by using one of the following methods:

   - Drag the column name to the trash icon at the bottom of the Columns To Display pane.
   - Click the name of the column to select it. Then click the trash icon.
6. To add content to the new column, double-click the cell in the column for each item in the list, and type whatever you want displayed in the cell. Then press Enter (Windows) or Return (Mac OS).
7. If you want the new column to be the column by which the documents are sorted in list view, use the Initial Sort pop-up menu to select the column.

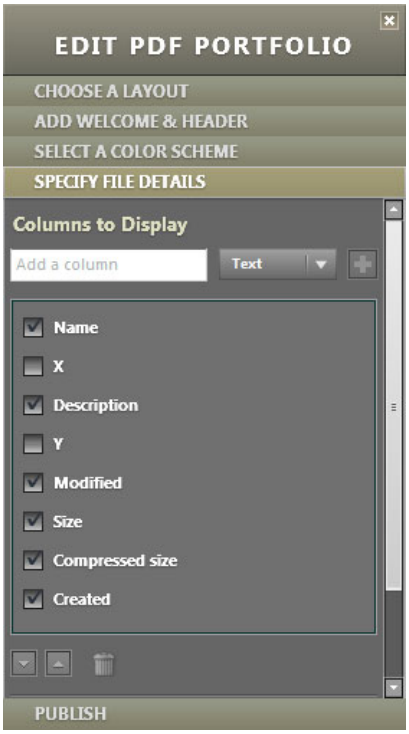

Figure 15 Specify File Details section

Publishing a PDF Portfolio

Publishing a PDF Portfolio is the simplest part of the process. Publishing is no more complicated than saving the document. You have multiple publishing options. The one you choose depends on how you plan to distribute the PDF Portfolio. You can:

- Save the PDF Portfolio (choose File > Save) and then copy it to a location where viewers can readily access it (say, a website).
- Send the PDF Portfolio via e-mail.
- Share the PDF Portfolio on Acrobat.com (a free service that makes it easy to create, share, and collaborate with others on documents).

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To share a PDF Portfolio via e-mail:

1. Open the PDF Portfolio.
2. In the PDF Portfolio toolbar, choose Email from the share menu (**Figure 16**).

   Acrobat uses your default e-mail client to open a new e-mail message with your PDF Portfolio attached.
3. Complete the e-mail message with a subject, a message, and the e-mail addresses of those you wish to receive it. Then send the message.

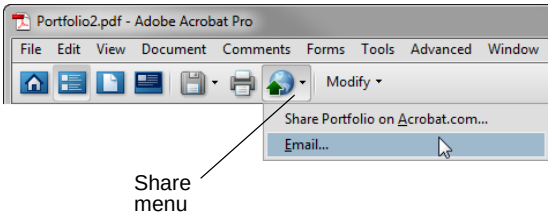

Figure 16 Share menu in the PDF Portfolio toolbar

Navigating the PDF Portfolio

Anyone who opens the PDF Portfolio can explore it by using either list view or the PDF Portfolio's visual layout. Viewers can use the PDF Portfolio toolbar (**Figure 17**) to switch between the two views. The PDF Portfolio toolbar consolidates all of the key ways to interact with a PDF Portfolio.

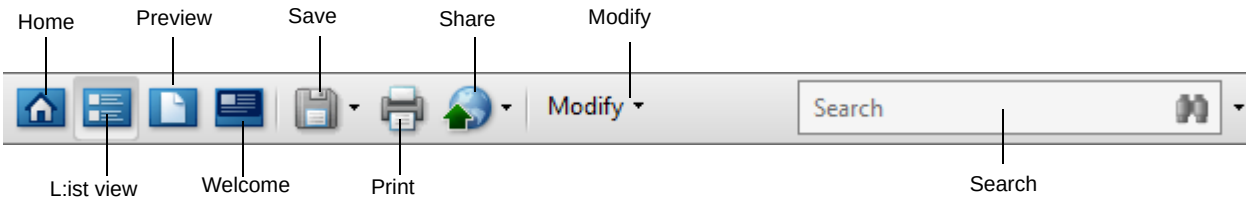

Figure 17 PDF Portfolio toolbar

- *Home:* Navigate through files visually, using the layout you selected in the Edit PDF Portfolio pane. If you have opened a PDF document in the PDF Portfolio, click this button to close the document preview and return to the PDF Portfolio.
- *List view:* Navigate through files by using file details.
- *Preview:* Preview the selected file.
- *Welcome:* Open the welcome page.
- *Save:* Save the PDF Portfolio as a whole or save the files individually.
- *Print:* Print some or all of the PDF files in the PDF Portfolio.
- *Share:* Share the PDF Portfolio with others, either by e-mail or by posting the file to Acrobat.com.
- *Modify:* Edit the contents of the PDF Portfolio. From this menu, you can add files or folders, delete items, convert documents to PDF or Flash, compress the PDF Portfolio's file size, or secure the PDF Portfolio with a password. You can toggle the PDF Portfolio editing mode.

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Securing the PDF Portfolio

If you want to be selective about who can view the content of the PDF Portfolio, it should be secured. You can secure a PDF Portfolio by locking it with a password. Anyone who wants to view the contents must have the password to view it.

To secure a PDF Portfolio with a password:

1. Open the PDF Portfolio.
2. In the PDF Portfolio toolbar, choose Secure Portfolio from the Modify menu (**Figure 18**).

   The Document Properties dialog box appears, open to the Security tab.
3. In the Security Method pop-up menu, choose Password Security (**Figure 19**).

   The Password Security Settings dialog box appears (**Figure 20**).

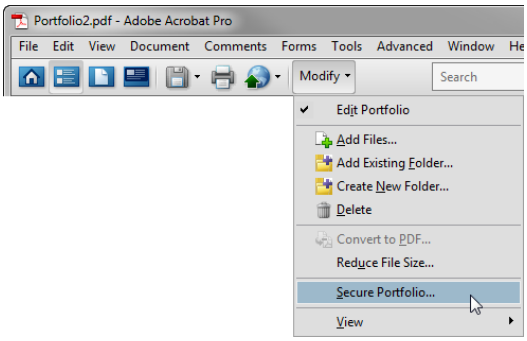

Figure 18 Modify menu in the PDF Portfolio toolbar

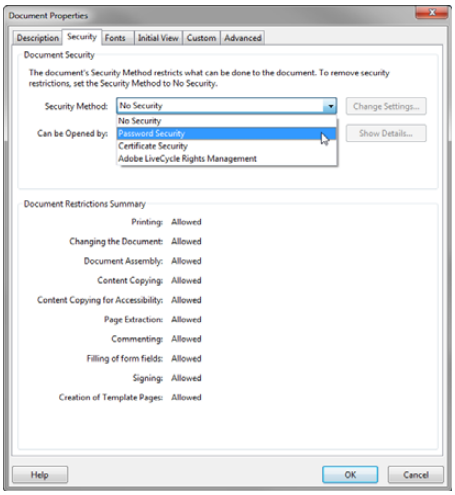

Figure 19 Security tab in the Document Properties dialog box

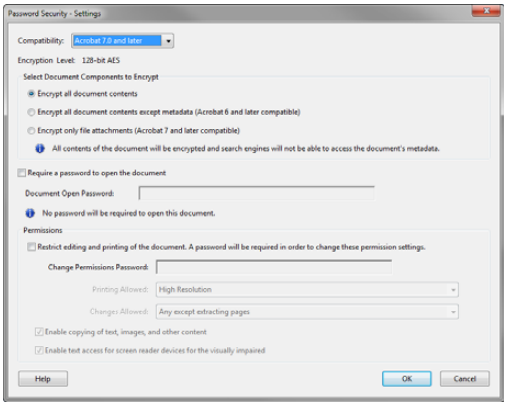

Figure 20 Passport Security Settings dialog box

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4. In the Compatibility pop-up menu, choose the version of Acrobat you want the security settings to accommodate (later versions provide more security).
5. In the Select Document Components To Encrypt section of the dialog box, select Encrypt All Document Contents.
6. Select Require A Password To Open The Document.
7. In the Document Open Password text field, type the password you want viewers to use to allow access.
8. If you want to control who can edit and print the document, select Restrict Editing And Printing Of The Document.

   When this option is selected, you can select more specific permissions with regard to printing, copying, and editing the contents of the PDF Portfolio.
9. Click OK.
10. If you changed the Document Open Password, the Confirm Document Open Password dialog box appears (**Figure 21**). Type the Document Open Password again, exactly as you did in the Password Security Settings dialog box.

    You may see a warning about the limitations of third-party software with regard to Acrobat security settings. If so, read the warning and click OK.
11. If you changed the Permissions Password, the Confirm Permissions Password dialog box appears. Type the Permissions Password again, exactly as you did in the Password Security Settings dialog box.

    Note: If you set a Document Open Password, the Permissions Password will also open the document and bypass the security settings.
12. A warning may appear indicating that security settings are not saved until the document is saved. If so, click OK.
13. Save the PDF Portfolio to apply the security settings.

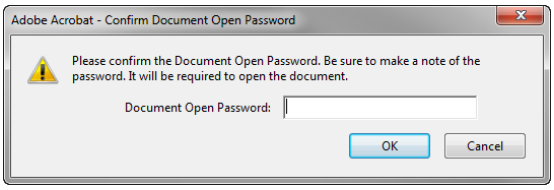

Figure 21 Confirm Document Open Password dialog box