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 the following enhancements must be made in individual documents contained in a PDF Portfolio.

With a PDF document, you can:

- Attach sticky notes to the document
- Create links from one part of the document to another
- Create links to external websites
- Add bookmarks to the document
- Add video, audio, and Flash movies to the document
- 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 documents for PDF Portfolios. For other enhancements, see Acrobat Help or visit the Acrobat in Education blog at http://blogs.adobe.com/acrobatineducation/.

Converting web pages to PDF format

You can include web-based materials in a PDF 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 file—such as JPEG images, SWF 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, however, 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, do the conversion 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 by using One Click Conversion in Internet Explorer and Firefox browsers.
- 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.

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

To create a PDF document from a Web page:

1. In Acrobat, do one of the following:
   - Choose File > Create > PDF From Web Page.
   - In the toolbar, click the Create button, and click PDF From Web Page.

   The Create PDF From Web Page dialog box appears (**Figure 1**).

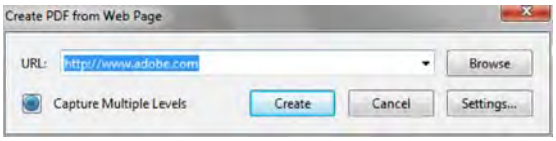

Figure 1 Create PDF From Web Page dialog box

2. Enter the complete path to the web page or click Browse and locate an HTML file.
3. To capture multiple levels of a site (that is, the depth of links Acrobat should follow), click the plus sign beside Capture Multiple Levels.

   The dialog box expands to show settings for capturing multiple levels in the same site (**Figure 2**).
4. 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.
5. 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.
6. 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.
7. Click Create.

   The Download Status dialog box shows the progress of the download (**Figure 3**).

   When the page or site is captured, the dialog box closes and the new PDF document appears (**Figure 4**).

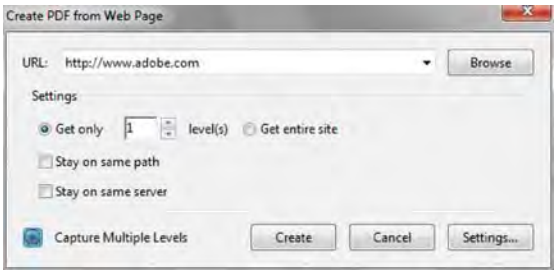

Figure 2 Settings used to capture multiple levels

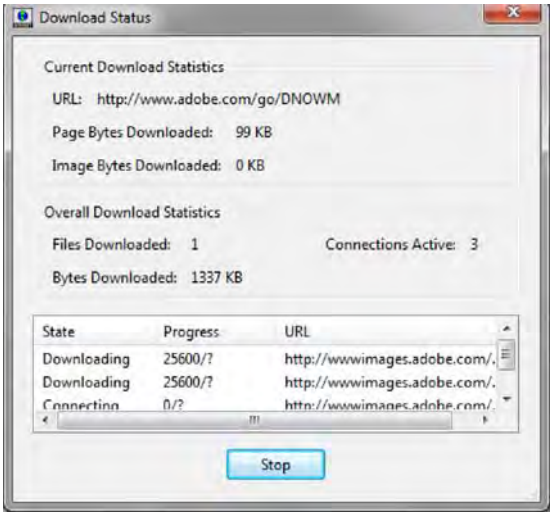

Figure 3 Download status dialog box

Figure 4 PDF document from a Web page

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.

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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 or later 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. Start Acrobat and 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. Open the Tools pane and expand the Content panel (**Figure 5**).

   The lower section in the Content panel includes options for adding and editing interactive objects.

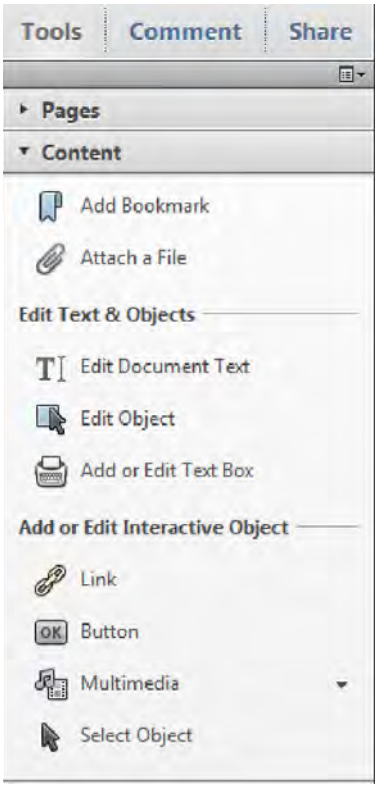

Figure 5 Content panel

3. Click Multimedia to open the pop-up menu (**Figure 6**).

   You can add video, sound, Flash animation, and 3D objects to the PDF.

4. Click Video.

5. 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 7**).

   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.

6. Add a URL in the File field, 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, .f4v, or .mp4.

7. (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.

8. Make sure that Snap To Content Proportions is selected in the Insert Video dialog box.

   This will size the object to match the proportions of the source video.

9. Click OK to add the video.

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

10. Click in the video to activate it.

    The video plays.

11. To position the video in the PDF, click Select Object in the Content panel, and drag the video object.

To add Adobe Flash (SWF) content to a PDF document:

1. Start Acrobat and 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. Open the Tools pane and expand the Content panel.

   The lower section in the Content panel includes options for adding and editing interactive objects.

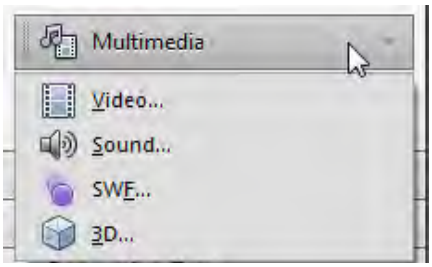

Figure 6 Multimedia pop-up menu

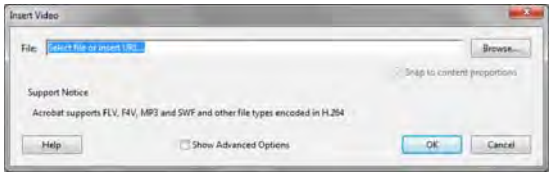

Figure 7 Insert Video dialog box

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3. Click Multimedia to open the pop-up menu.

   You can add video, sound, animation, and 3D objects to the PDF.

4. Click SWF.

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

   The Insert SWF dialog box appears (**Figure 8**).

   If you double-click the page, Acrobat places the upper left corner of the SWF where you clicked. If you drag an area on the page, the media is placed within the area. If you have Snap To Content Proportions selected in the Insert Flash dialog box, the SWF is sized to match the area that you draw.

6. Add a URL in the Name field, or click Browse (Windows) or Choose (Mac OS) to find the Flash movie file, and then click Open.

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

7. Make sure that Snap To Content Proportions is selected to automatically size the multimedia object to fit your SWF content.

8. (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.

9. Click OK.

   The SWF content appears in the PDF document.

10. Click in the SWF content to activate it.

    The SWF movie plays.

11. To position the SWF movie in the PDF, click Select Object in the Content panel, and drag the object.

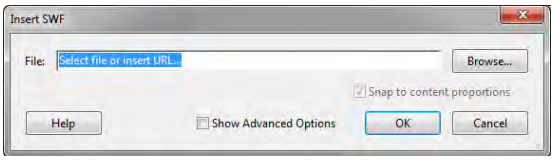

Figure 8 Insert SWF dialog box

To add sound to a PDF document:

1. Start Acrobat and 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. Open the Tools pane and expand the Content panel.

   The lower section in the Content panel includes options for adding and editing interactive objects.

3. Click Multimedia to open the pop-up menu.

   You can add video, sound, animation, and 3D objects to the PDF.

4. Click Sound.

5. Drag or double-click to select the area on the page where you want to place the sound object.

   The Insert Sound dialog box appears (**Figure 9**).

   If you double-click the page, Acrobat places the upper left corner of the sound object where you clicked. If you drag an area on the page, the object is placed within the area.

6. Add a URL in the Name field, or click Browse to find the media file, and then click Open.

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

   Note: Only MP3 and MP4 audio files are supported in PDFs created using Adobe Acrobat.

7. Click OK.

   A sound object appears in the PDF document. You can change the size of the object or drag it to position it.

8. Click the Sound object to activate it.

   The playback controls appear and the sound plays.

9. To position the object in the PDF, click Select Object in the Content panel, and drag the object.

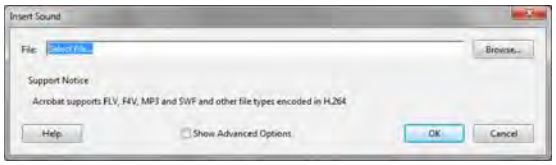

Figure 9 Insert Sound dialog box

Converted media require Adobe Reader X or later or Acrobat X or later for playback. Viewers who attempt to play converted media in earlier versions of Adobe Reader or Acrobat are prompted to upgrade their version of Adobe Reader. If you want to delete media you have inserted, choose the Select Object tool in the Content panel, click to select the object, and press Delete.

Managing reader rights

You may wish to create a PDF 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 Adobe Acrobat. Enabling these rights allows viewers using Adobe Reader 9 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 File > Save As > Reader Enabled PDF > Enable Commenting In Adobe Reader (Windows) or File > Save As > Reader Extended PDF > Enable Commenting and Measuring. In the Save As dialog box, select a location for the file, enter a file name, and click Save.

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

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Adding bookmarks to a document

In Acrobat, you can use bookmarks (**Figure 10**) to mark places in the PDF that you want viewers to find easily (or to which you want to return). You can use a bookmark to jump to a destination in the PDF, another document, or a web page. A bookmark is a link with representative text in the Bookmarks panel in the navigation pane. Each bookmark goes to a different view or page in the document. When you create PDFs of documents created by most desktop publishing programs, Acrobat automatically generates bookmarks from the table-of-contents entries.

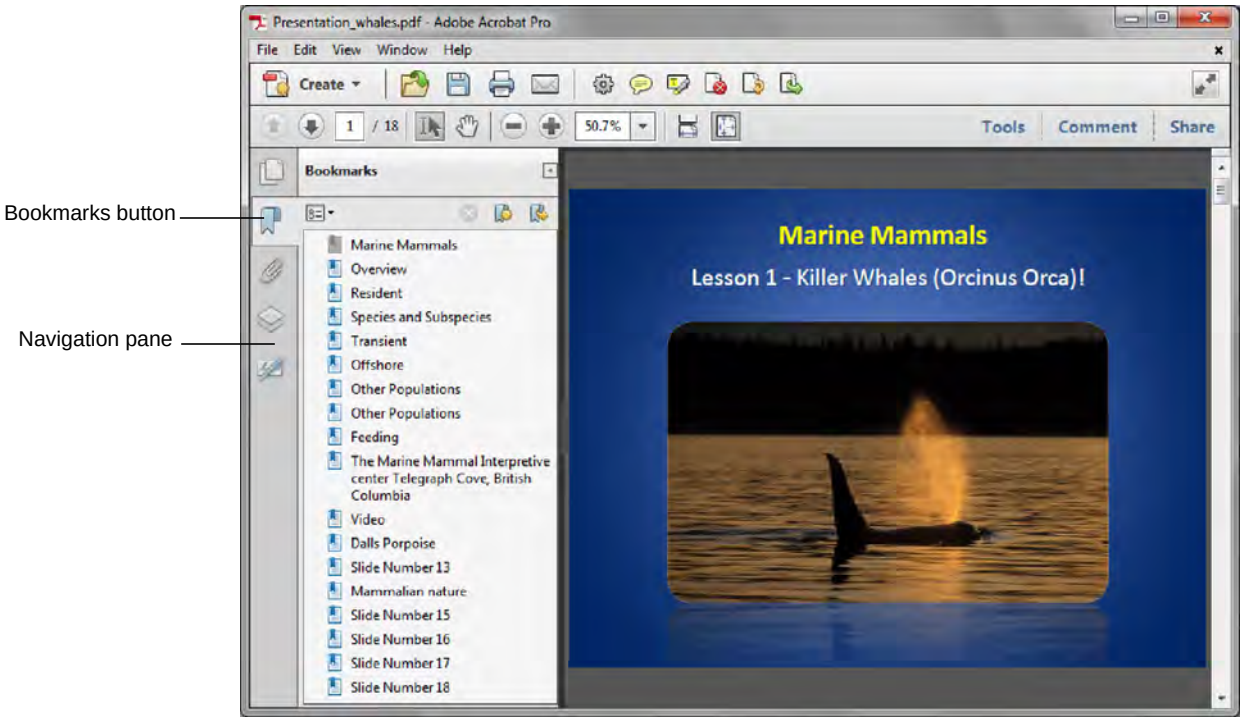

Figure 10 Bookmarks in a document

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 a bookmark destination 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. In a PDF document, open the page you want the bookmark to link to, and adjust the view settings (that is, use the Select & Zoom tools to adjust the magnification you want viewers to see when the bookmark opens the page).

2. Use the Selection tool in the toolbar (**Figure 11**) to select the text or part of the page to which you want the bookmark to open when it is clicked:
   - To bookmark selected text, drag to select the text. The selected text becomes the label of the new bookmark. You can edit the label in the Bookmarks panel.
   - To bookmark a single image, click the image or drag a rectangle around the image.
   - To bookmark a portion of an image, drag a rectangle around the portion.
3. In the Bookmarks panel, click the New Bookmark button (**Figure 12**).
4. Type or edit the name of the new bookmark.

   To rename a bookmark you've already created, Right-click (Windows) or Control-click (Mac OS) the bookmark in the Bookmarks panel, choose Rename, and type the new bookmark name.
5. To change the order of bookmarks in the Bookmarks panel, drag the bookmark you want to move to its new location in the list of bookmarks.
6. To delete one or more bookmarks, select the bookmark or range of bookmarks and select Delete Bookmark(s) from the options menu or press Delete.

   Note: To select multiple book marks, hold down Control (Windows) or Command (Mac OS).

   Deleting a bookmark deletes all child bookmarks but does not delete any destination text or images.

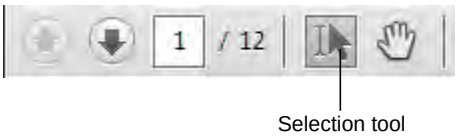

Figure 11 Acrobat Toolbar

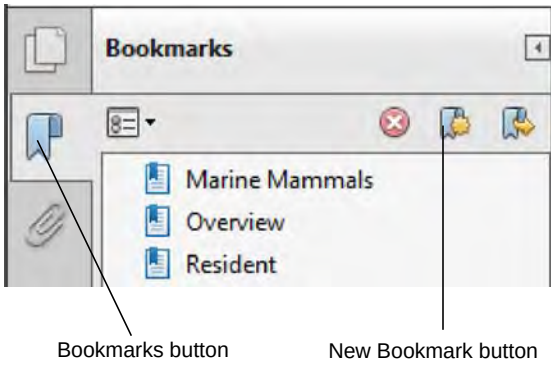

Figure 12 Bookmarks panel

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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 13**).
4. Click Yes when the message appears asking you to confirm the change.

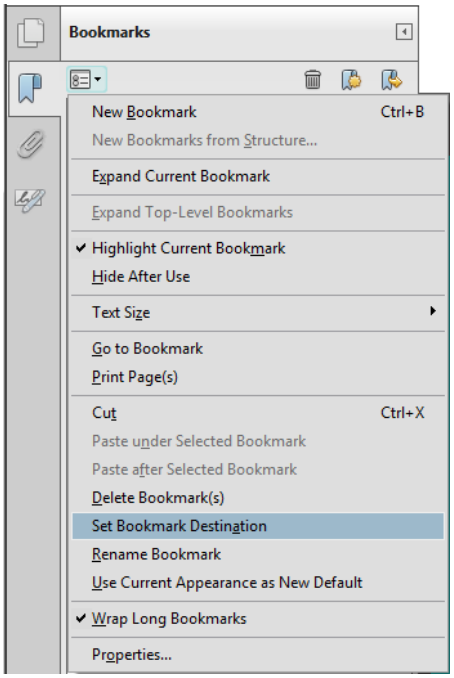

Figure 13 Options menu

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 14**).

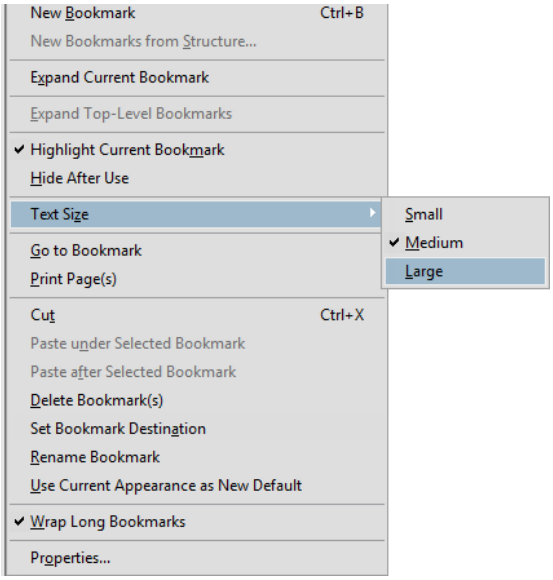

Figure 14 Options menu

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 15**).
3. Click the Appearance tab.
4. Select a style and color for the bookmark text.
5. Click OK.

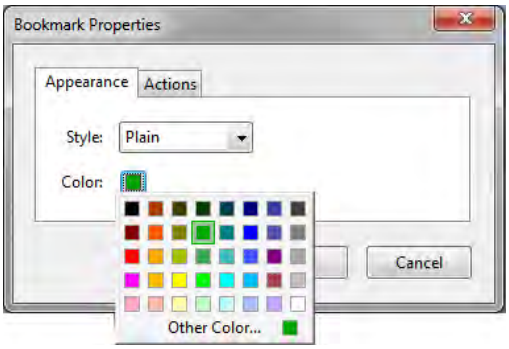

Figure 15 Bookmark Properties dialog box

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 16**).
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.

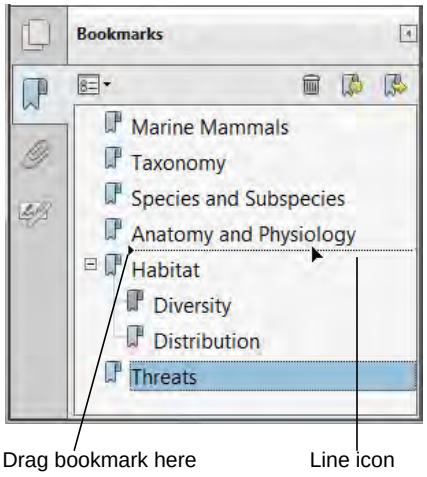

Figure 16 Bookmarks panel

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 an action 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.

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

1. Open the Tools pane and expand the Content panel (**Figure 17**).
2. In the Content panel, click Link.

   The cursor changes to a cross hair.
3. Draw a rectangle around the text or object you want viewers to click to activate the link.

   The Create Link dialog box appears (**Figure 18**), showing the properties you can assign 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 Create Link dialog box, select Go To A Page View and click Next.

   The Create Go To View dialog box appears (**Figure 19**).
6. Navigate to the page you want the link to open.

   Note: If you were linking from one document to another document, you would 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.
7. Use the zoom controls to set the zoom level of the document that viewers see when they open the document.
8. In the Create Go To View dialog box, click Set Link.

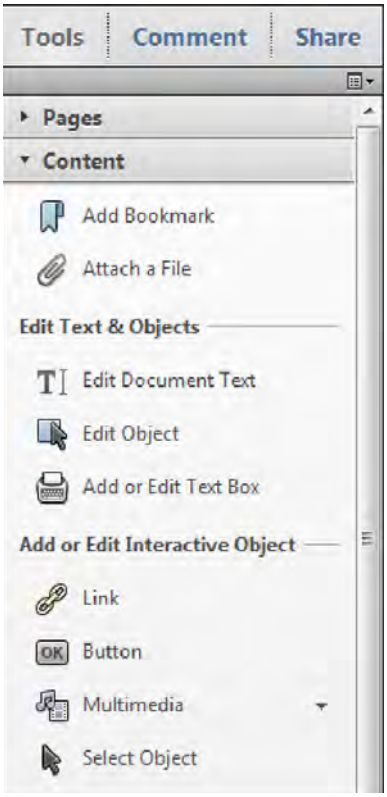

Figure 17 Content panel

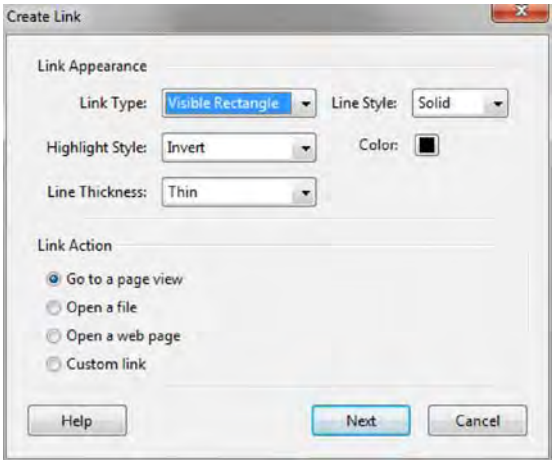

Figure 18 Create Link dialog box

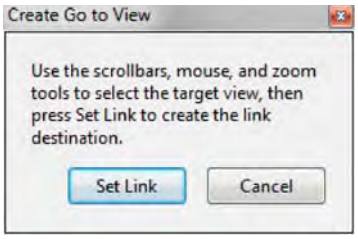

Figure 19 Create Go To View dialog box

9. To test the link, click the Selection tool in the toolbar. Position the mouse pointer over the link. When the pointer changes to a pointing hand, click the link.
10. To change the appearance or behavior of the link, click the Select Object tool in the Content panel (**Figure 20**). Then, double-click the link to open the Link Properties dialog box (**Figure 21**), make your changes, and click OK.

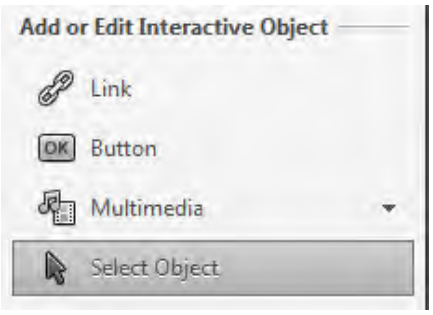

Figure 20 Select Object tool

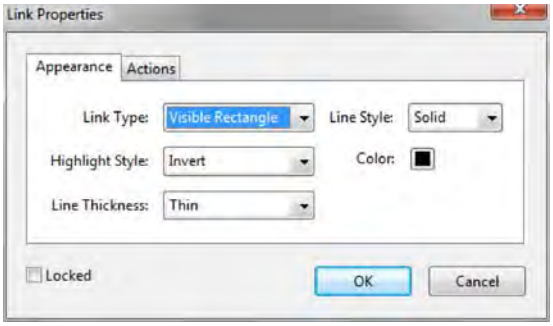

Figure 21 Link Properties dialog box

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. Open the Tools pane, expand the Content panel, and click Link.

   The cursor 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 22**), 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.

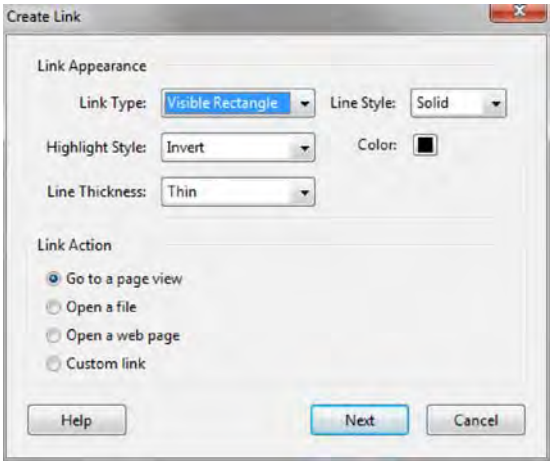

Figure 22 Create Link dialog box

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5. In the Create Link dialog box, click Open A Web Page and click Next.

   The Edit URL dialog box appears (**Figure 23**).

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, click the Selection tool in the toolbar. Position the mouse pointer over the link. When the pointer changes to a pointing hand, click the link.

   Note: If you receive a security warning, select the option to remember this action, and then click Allow to view the external link.

8. To change the appearance or behavior of the link, click the Select Object tool in the Content panel. Then, double-click the link to open the Link Properties dialog box (**Figure 24**), make your changes, and click OK.

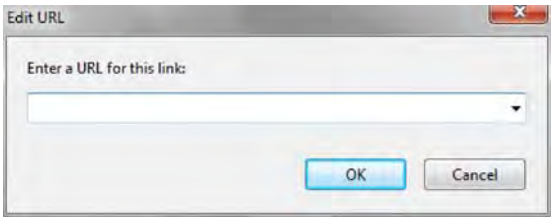

Figure 23 Edit URL dialog box

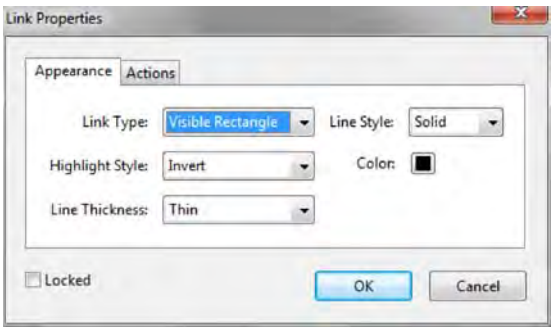

Figure 24 Link Properties dialog box