How to create and personalize a PDF Portfolio

A PDF Portfolio contains multiple files assembled into an integrated PDF unit (**Figure 1**). 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, e-mail 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.

To create a PDF Portfolio, first gather and organize the assets you want to include in the PDF Portfolio. Such assets probably fall into one or more of these categories: digital, paper, web, and rich media. Prepare and organize these files prior to assembling them into a PDF Portfolio.

- *Digital assets:* Collect digitally created documents into a folder. Make sure you keep in mind that if you want the files to stay in their native format, you can add them directly into the PDF Portfolio without converting them to PDF. But if you want to be sure viewers can read the files, you should convert them to PDF first, so the files will play automatically in Adobe Reader.
- *Rich media files:* Collect video and audio files into a separate folder for inclusion in the PDF Portfolio. These are media files you want to add directly to the PDF Portfolio, rather than embedding them in a PDF document.

  Note: Viewers using Mac OS can interact with rich media supported by QuickTime Player and Adobe Flash Player. Viewers using Microsoft Windows have more player options. Make sure you know your audience; make reasonable predictions about the capabilities of the computers that viewers will be using.
- *Scanned documents:* You can include documents that exist only on paper. Scan these documents in Acrobat; Acrobat can convert the scans to PDFs.

Creating and organizing a PDF Portfolio is a simple process—you add files by using the Add Files dialog box or by dragging and dropping files from one folder to another.

If you have already organized your materials into folders on your local drive, with minimal effort you can use the same organization in your PDF Portfolio. Simply drag the top-level folder to your PDF Portfolio work area and all of the files will be copied into the PDF Portfolio. The folders are copied as well, maintaining the organizational structure.

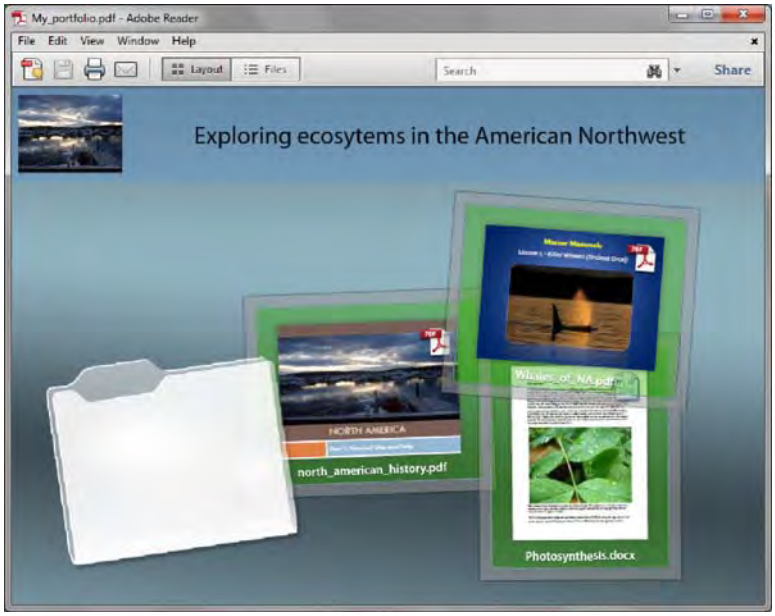

Figure 1 A PDF Portfolio

To create a new PDF Portfolio by using the Create PDF Portfolio wizard:

1. In Acrobat, do one of the following:
   - In the Welcome screen, click Create PDF Portfolio.
   - Choose File > Create > PDF Portfolio.
   - In the toolbar, click the Create button, and choose PDF Portfolio from the menu.

   The Create PDF Portfolio wizard appears (**Figure 2**). You can choose from five layouts.

   - *Click-Through* allows user to click through a series of slides in a linear path, or use the carousel to locate and view files non-linearly.
   - *Freeform* arranges the files in a scattered arrangement of thumbnails.
   - *Grid* arranges files in an orderly grid that scales to fit the number of files in the PDF Portfolio.
   - *Linear* arranges the files in a linear path and guides the user through each file in a determined sequence.
   - *Wave* arranges files in a spinning path that fans out off the screen for an interesting and fun layout.
2. Select a layout and click Add Files.

   The Add Files dialog box appears.
3. Select the files you want to add to the PDF Portfolio.

   Note: You can add one or multiple files to the PDF Portfolio. To select a range of files, click the first file, hold down Shift, and select the last file in the range. Ctrl-click (Windows) or Command-click (Mac OS) to select multiple non-contiguous files.
4. Click Open (Windows) or Finish (Mac OS).

   The files are added to the new PDF Portfolio. The PDF Portfolio opens in Layout view (**Figure 3**) with either the Layout, Details, or Share pane on the right. The Portfolio Properties panel is located in the bottom-right corner of the window.

   The *Layout* pane includes panels for managing content, and changing the layout and design style of the PDF Portfolio.
5. Click Details to change to Details view and open the Details pane.

   The *Details* pane shows a list of every asset file in a table layout (**Figure 4**). You can use the panel to customize which details are shown for each file.

   The *Share* pane is used to share the PDF Portfolio by e-mail or by using the Adobe SendNow Online service.

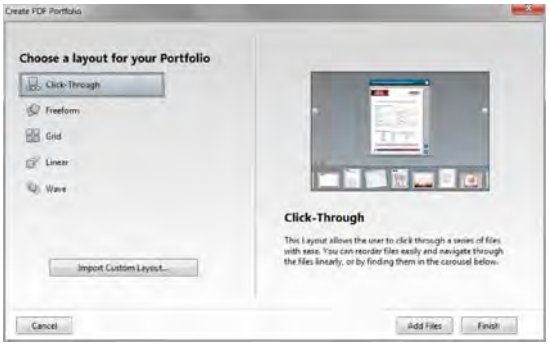

Figure 2 Create PDF Portfolio wizard

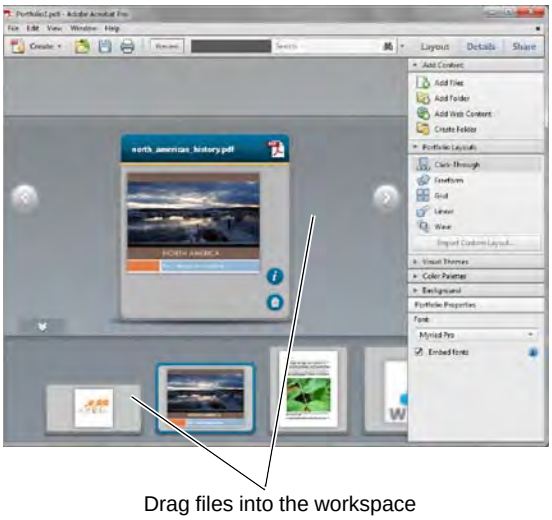

Figure 3 PDF Portfolio workspace, Layout pane

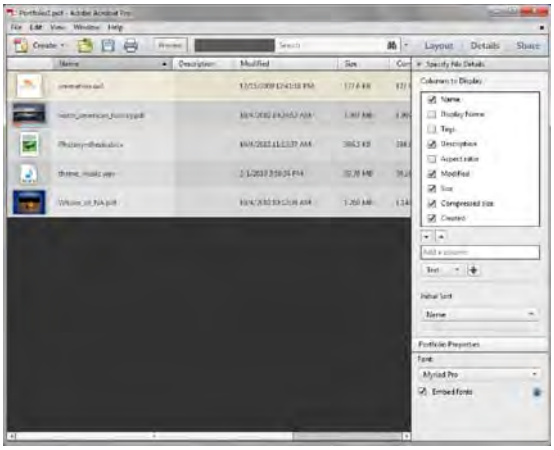

Figure 4 PDF Portfolio workspace, Details pane

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To add more files to the PDF Portfolio:

1. In Acrobat, open the PDF Portfolio in Layout view. If the Task panes do not appear on the right side of the workspace, click the Edit button in the PDF Portfolio toolbar (**Figure 5**).
2. In the Add Content panel, click Add Files.

   The Add Files dialog box appears.
3. Browse to locate the file you want to add, select it, and click Open.

   The file is added to the PDF Portfolio.

   You can also drag files directly into the PDF Portfolio workspace in Layout view.
4. Size and position the Acrobat window so that you can see your computer desktop.
5. From the desktop, drag documents or folders to the PDF Portfolio workspace (**Figure 6**).

   The documents or folders you dragged appear in the workspace (**Figure 7**).

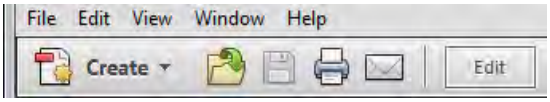

Figure 5 PDF Portfolio toolbar

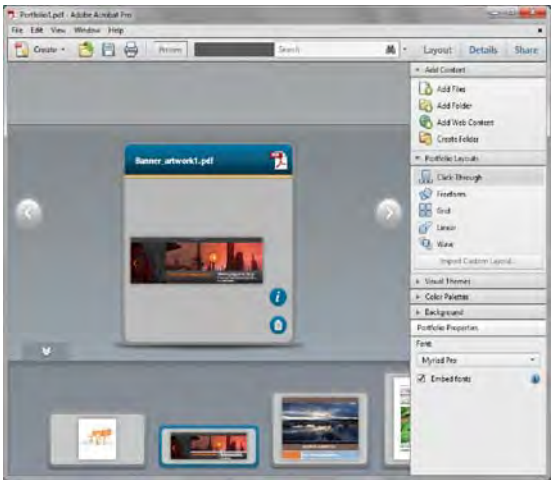

Figure 6 Drag files to the workspace

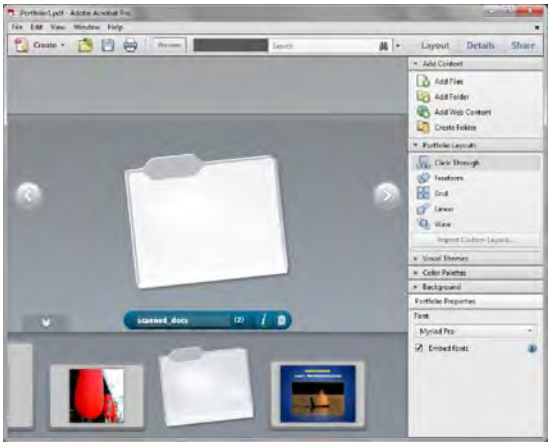

Figure 7 Files and folders added to the workspace

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

To create a new folder in a PDF Portfolio:

1. In Acrobat, open the PDF Portfolio, in Layout view. If the Task panes do not appear on the right side of the workspace, click the Edit button in the PDF Portfolio toolbar.
2. In the Add Content panel, click Create Folder.

   The New Folder dialog box appears (**Figure 8**).

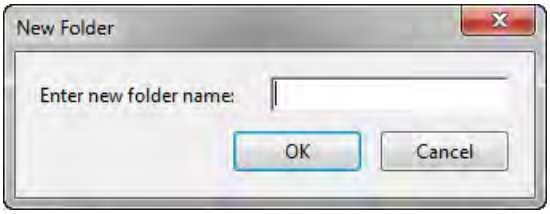

Figure 8 New Folder dialog box

3. Type a name for the new folder. Then click OK.

   The new folder appears in the PDF Portfolio (**Figure 9**). You can add files to the new folder by dragging them either from within the PDF Portfolio or from the computer desktop.

Figure 9 New folder in the PDF Portfolio

Previewing a PDF Portfolio

When you first create a new PDF Portfolio in Acrobat, you begin in Edit mode. Edit mode is used to design and edit the PDF Portfolio. While in Edit mode, the Preview button appears in the PDF Portfolio toolbar. Preview the PDF Portfolio to see how it will appear when other people open the document.

To preview a PDF Portfolio:

1. Click Preview in the PDF Portfolio toolbar (**Figure 10**).

   When someone views the PDF Portfolio, they can browse the files in Layout view or they can view the files in a list by using Files view. The Layout and Files buttons are in the PDF Portfolio toolbar (**Figure 11**).

2. Click Files.

   The files are shown in a list, along with any details you selected in the Details pane while creating the PDF Portfolio (**Figure 11**).

3. Click Edit to return to Edit mode.

Figure 10 PDF Portfolio toolbar

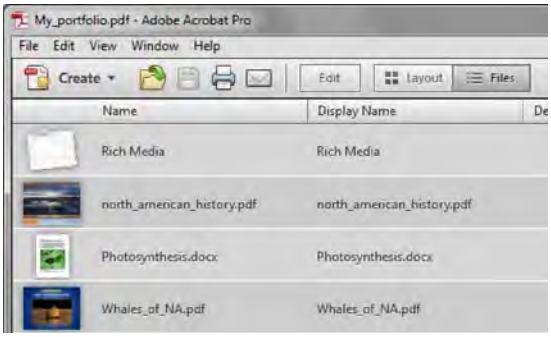

Figure 11 Files view in Preview mode

Changing the layout of a PDF Portfolio

The robust PDF Portfolio features in Acrobat make it easy to create a sophisticated presentation package that can be viewed in a graphical layout, or as a detailed list of files. To change the graphical appearance and style of a PDF Portfolio, you can use the Layout view in Edit mode.

In the Layout pane, you can quickly customize the appearance of a PDF Portfolio, including:

- Portfolio Layout
- Visual Theme
- Color Palette
- Background

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To change the layout of a PDF Portfolio:

1. In Acrobat, open the PDF Portfolio.

   To change the layout, you need to be in Edit mode. When in Edit mode, the Preview button appears at the top of the window. When in Preview mode, the Edit button is visible. To change to Edit mode, click Edit.

2. Make sure you are in Edit mode.

3. In the Layout pane, expand the Portfolio Layouts panel (**Figure 12**), and select a layout.

   In a similar way, you can select options in the Visual Themes panel, the Color Palettes panel, and the Background panel.

Figure 12 Portfolio Layouts panel

PDF Portfolio headers

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

Note: You can also 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 header is visible when viewers are navigating the PDF Portfolio but not when they have opened one of the documents the PDF Portfolio contains.

To add a header to the PDF Portfolio layout:

1. In Acrobat, open the PDF Portfolio.

2. Make sure you are in Edit mode and Layout view.

   Empty space is reserved for the header at the top of the layout (**Figure 13**).

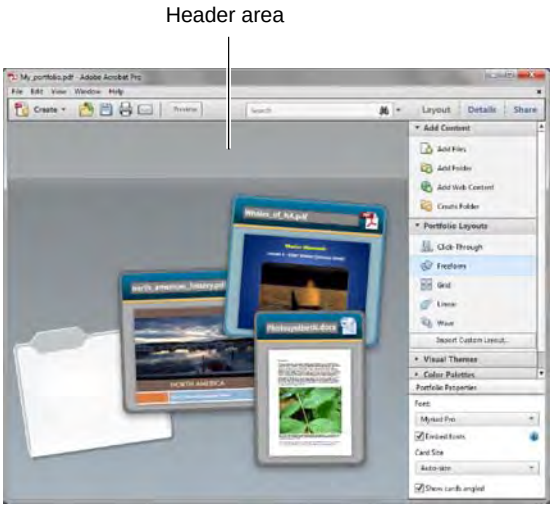

Figure 13 Header area

3. To create the header, click in the empty header area at the top of the PDF Portfolio layout.

   The Header Properties panel appears in the Layout pane on the right (**Figure 14**).

   You can create a header that includes an image, text, or both. There are two ways to add content to the header.

   - Use the Add Image and Add Text buttons to add objects to the header and then manually position them in the header area.
   - Open the Templates pop-up menu (**Figure 15**) and choose a layout for text, images, or both. When you choose a template, Acrobat adds image and/or text placeholder objects (**Figure 16**).

   You can also change the background color and opacity of the header area by using the Background Color settings in the Header Properties panel (**Figure 14**).

4. Once you've added an image placeholder object to the header, click it to select it, and then in the Image Properties panel (**Figure 17**), click Choose Image. Browse to locate the image (or SWF file), select it, and click Open.

   To adjust the size of an object in the header, you can click it to select it, and then use the handles to change its size. Drag an object to change its position.

Figure 14 Header Properties panel

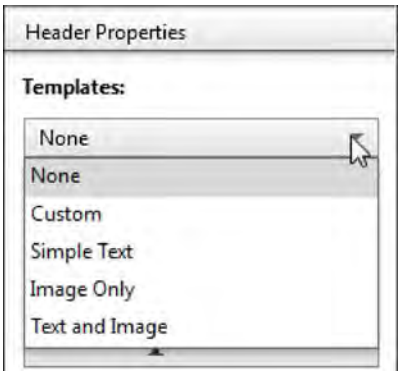

Figure 15 Templates pop-up menu

Figure 16 Header placeholder objects

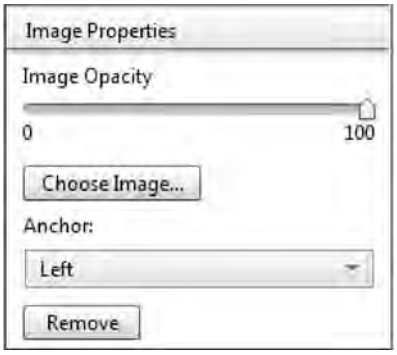

Figure 17 Image Properties panel

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Color Scheme

You can personalize a PDF Portfolio by selecting a color scheme. You can select one of the preconfigured color schemes provided in Acrobat or create your own customized color scheme. You might, for instance, use a customized color scheme to match the school colors. Visit Adobe Kuler at http://kuler.adobe.com/ for additional help with selecting a color scheme.

To select a preset color scheme:

1. In Acrobat, open the PDF Portfolio.
2. Make sure you are in Edit mode and Layout view.
3. Expand the Color Palettes panel, and click one of the preset color schemes (**Figure 18**).

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

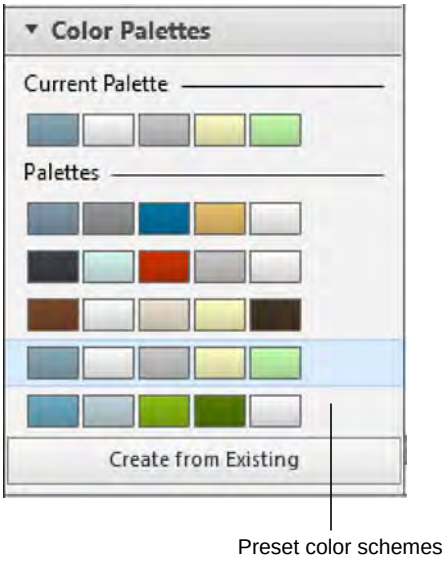

Figure 18 Color Palettes panel

To customize a color scheme:

1. In Acrobat, open the PDF Portfolio.
2. Make sure you are in Edit mode, Layout view, and have the Color Palettes panel expanded.
3. Click Create From Existing in the Color Palettes panel (**Figure 18**).

   The Create From Existing pane appears. It contains a Lightness & Saturation control, a Hue slider, and five color categories (**Figure 19**).
4. To replace a color, select it and then:
   - Drag the Hue slider to select a base color for the category.
   - Click or drag in the Lightness & Saturation control to choose a shade for the color.

   Note: You can also enter a specific hexadecimal color value in the box for each color.

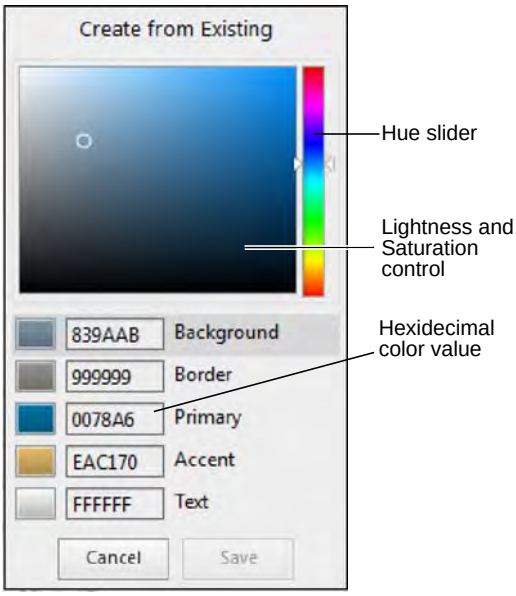

Figure 19 Create From Existing pane

5. Repeat step 4 for all of the color categories you wish to change, and then click Save.

   A new color palette is added to the Custom Palettes section (**Figure 20**).

Figure 20 Custom Palettes

Customizing the appearance of Files view

In a PDF Portfolio, viewers have the option to view the files in a list by using Files view (**Figure 21**). Acrobat automatically creates a file list for every PDF Portfolio. You can add your own columns to list view.

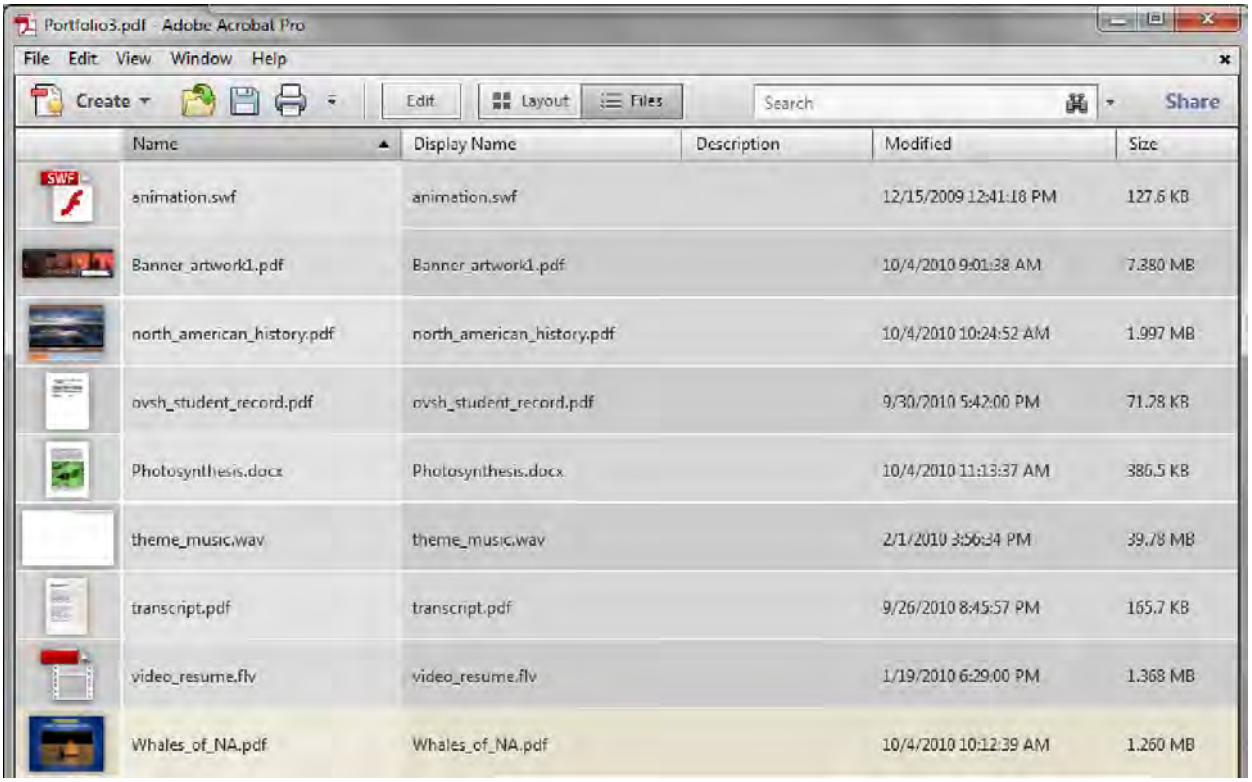

Figure 21 Files view in a PDF Portfolio

To add a column to the Files list:

1. In Acrobat, open the PDF Portfolio.

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2. Make sure you are in Edit mode and Details view.

   The columns to display are listed in the Details pane on the right (**Figure 22**).

3. To display a column, select its check box in the Columns To Display section. To hide a column, deselect its check box.

4. To add a new column, click in the Add A Column box and enter text to use as the column header.

5. Open the Column Type pop-up menu (**Figure 23**) and select the type of column you want to add (choices are Text, Number, Date). This choice determines the sorting rules for the column.

6. Click the Add Column button (**Figure 23**) to add the column to the file list.

7. In the Columns To Display list, make sure the new column is checked.

   You can remove columns from list view by deselecting them. You can get rid of them permanently by clicking the column in the Columns To Display List and then clicking the Remove Column button (**Figure 24**).

8. 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).

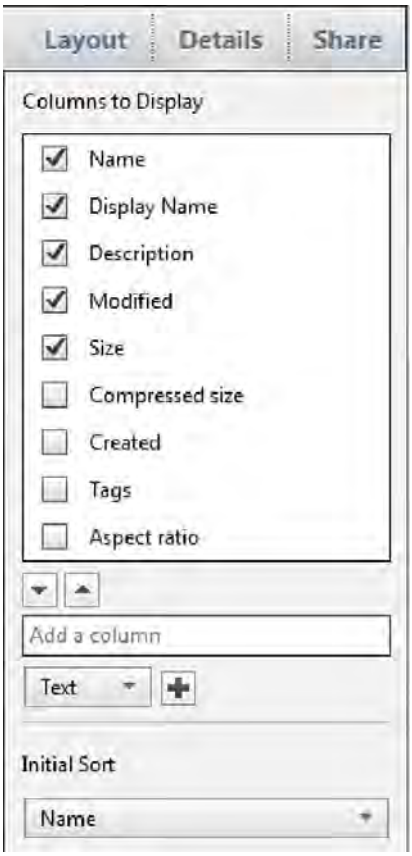

Figure 22 Details pane

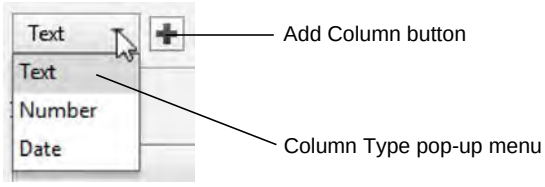

Figure 23 Column Type pop-up menu

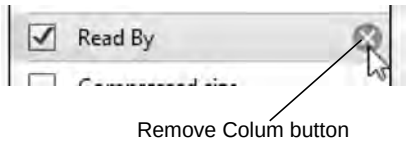

Figure 24 Remove Column button

Publishing a PDF Portfolio

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

- Save the PDF Portfolio (choose File > Save Portfolio) 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 by using the Adobe SendNow Online service.
- Save the PDF Portfolio as a website by choosing File > Save PDF Portfolio As Web Site

To share a PDF Portfolio via e-mail:

1. In Acrobat, open the PDF Portfolio.
2. Click Share to view the Share pane.
3. In the Share pane, select Attach To Email (**Figure 25**).

   The current PDF Portfolio document is added to the Select Any Type Of File box. If it's not, then click Add File and browse to locate and select the file.
4. Click Attach.

   Acrobat uses your default e-mail client to open a new e-mail message with your PDF Portfolio attached.
5. 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 25 Share pane

Navigating the PDF Portfolio in Acrobat Reader X

Anyone who opens the PDF Portfolio in Acrobat Reader X can explore it by using the visual Layout view or by selecting Files to view the files list. Viewers can use the PDF Portfolio toolbar (**Figure 26**) to switch between the two views.

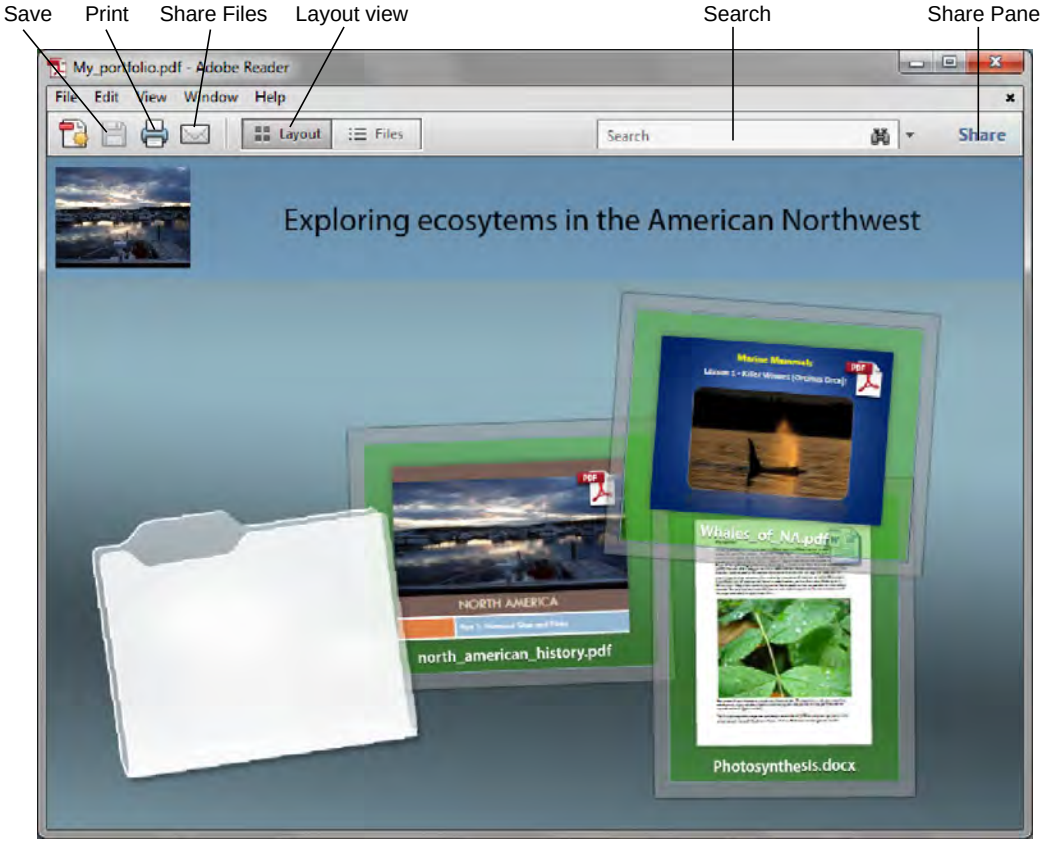

Figure 26 PDF Portfolio toolbar

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- *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 Files* or *Share pane:* Opens the Share pane so that you can share the PDF Portfolio with others, either by e-mail or by posting the file to Acrobat.com using the Adobe ShareNow Online service.
- *Layout view:* View and explore the PDF Portfolio in Layout view.
- *List view:* View and explore the PDF Portfolio as a list, along with detailed information about each file.
- *Search:* Search for files in the PDF Portfolio by keyword search.

Note: The same options are available to anyone who views the PDF Portfolio in Acrobat X Pro. However in Acrobat X the Edit button is available, allowing others to modify the PDF Portfolio.