5 COMBINING FILES IN PDF PORTFOLIOS

Lesson Overview

In this lesson, you'll learn how to do the following:

- Quickly and easily combine files of different types into one PDF Portfolio.

- Customize the look and feel of a PDF Portfolio.

- Add a header to a PDF Portfolio (Acrobat 9 Pro and Pro Extended only).

- Add a welcome screen to a PDF Portfolio (Acrobat 9 Pro and Pro Extended only)

- Share a PDF Portfolio.

- Search a PDF Portfolio.

- Modify an existing PDF Portfolio.

- Secure a PDF Portfolio

- Combine files into a single PDF file without creating a PDF Portfolio.

This lesson will take approximately 45 minutes to complete. Copy the Lesson05 folder onto your hard drive if you haven't already done so.

<<Art to come>>

About PDF Portfolios

In Acrobat 9, you can assemble multiple files into an integrated PDF Portfolio. You can combine files of different formats, created in different applications, without converting them to PDF. For example, you could assemble all the documents for a specific project, including text documents, email messages, spreadsheets, CAD drawings, and PowerPoint presentations. The original files retain their individual identities, but are still part of the PDF Portfolio file. Each component file can be opened, read, edited, and formatted without affecting the other files in the PDF Portfolio.

PDF Portfolios offer several advantages over merging multiple files into an ordinary PDF file:

- You can add and remove component documents easily.

- You can quickly preview component files without having to pause for Open or Save dialog boxes.

- You can edit individual files within the PDF Portfolio without affecting the other files. You can also edit non-PDF files in their native applications from within a PDF Portfolio; any changes you make are saved to the file within the PDF Portfolio.

- You can share the PDF Portfolio with others and be sure they receive all the component parts.

- You can sort component files by categories that you can customize.

- You can print one, all, or any combination of components in the PDF Portfolio.

- You can search individual component documents or the entire PDF Portfolio, including non-PDF component files.

- You can add non-PDF files to an existing PDF Portfolio without converting them to PDF.

- The source files of a PDF Portfolio are not changed when you create the PDF, and changes you make to component files do not change the original files.

Getting started

In this lesson, you'll create a PDF Portfolio of documents for the board meeting of a fictitious beverage company. The PDF Portfolio will include a Microsoft Excel spreadsheet, a Microsoft Word document, a Microsoft PowerPoint presentation, and several PDF files. If you're using Acrobat Pro, you'll customize the PDF Portfolio with a header and an animated company logo.

Creating a PDF Portfolio

You'll create a PDF Portfolio, and then add the files you want to include in it.

1 Start Acrobat 9.

2 Choose File > Create PDF Portfolio.
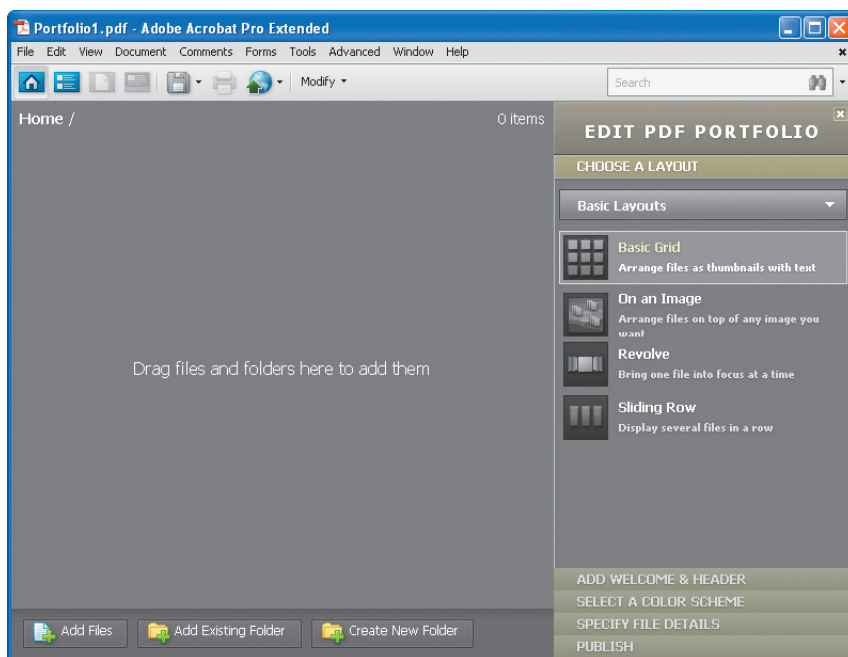
The Edit PDF Portfolio pane appears on the right side of the window. Additionally, the PDF Portfolio toolbar appears below the menu bar. This toolbar appears whenever you open a PDF Portfolio.

3 Click Add Files at the bottom of the window.

4 Navigate to the Lesson05 folder.

The folder contains an Excel spreadsheet, a PowerPoint presentation, a Word document, and several PDF files.

5 Select the Aquo_Bottle.pdf file, and click Open.

Acrobat adds the file you selected to the PDF Portfolio.

6 Click Add Files again.

7 Shift-click to select the following files in the Lesson05 folder:

- Aquo_Building.pdf
- Aquo_Costs.pdf
- Aquo_Fin_Ana.xls
- Aquo_Fin_Data.pptx
- Aquo_Mkt_Summ.doc
- Aquo_Overview.pdf

8 Click Open to add them to the PDF Portfolio.

When you add a file to a PDF Portfolio, a copy of the original document is included in the PDF file. Some file formats, such as TIFF, are natively supported by Acrobat and Reader. However, to see files in some formats, viewers need to have an application installed that supports the format. Which formats require supporting applications depends on the operating system the viewer is using. For example, if you include a PowerPoint presentation in your portfolio, a viewer using Windows XP must have PowerPoint installed to see it, but one using Windows VIsta can view the presentation without having PowerPoint installed.

Organizing files in folders

You can add an entire folder to a PDF Portfolio, or you can combine existing files in a new folder. You'll create a folder for the financial data.

1 Click the Create New Folder button.

2 Name the new folder **Financial data**, and click OK.

3 Drag the Aquo_financial_
anaylsis.xls and Aquo_
financial_data.pptx files into
the new folder.
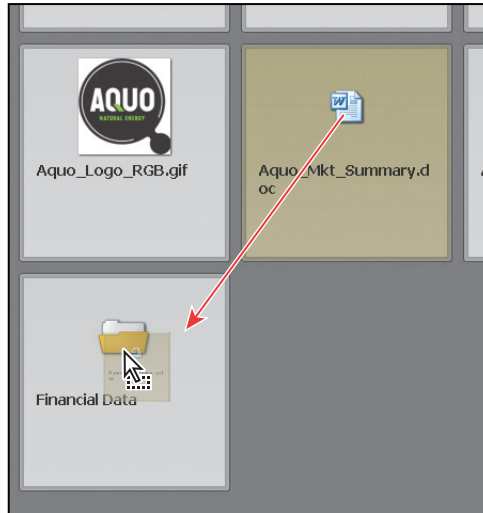
4 Choose File > Save Portfolio. Name the PDF Portfolio **Aquo Board Meeting**.

Adding descriptions to component files

You can add descriptions to files and folders in the PDF Portfolio to help viewers find the files they want.

1 Click below the words "Financial data" on the Financial data card..

2 Type " Financial analysis spreadsheet and financial presentation" in the description box.

Customizing your PDF Portfolio

The Edit PDF Portfolio pane includes several options for customizing the look and feel of your PDF Portfolio. You'll choose a layout and select a color scheme to create a more professional-looking document. If you're using Acrobat 9 Pro or Pro Extended, you'll also add a header with the company's logo and include a welcome page with an FLV (Flash video) file to finish the look.
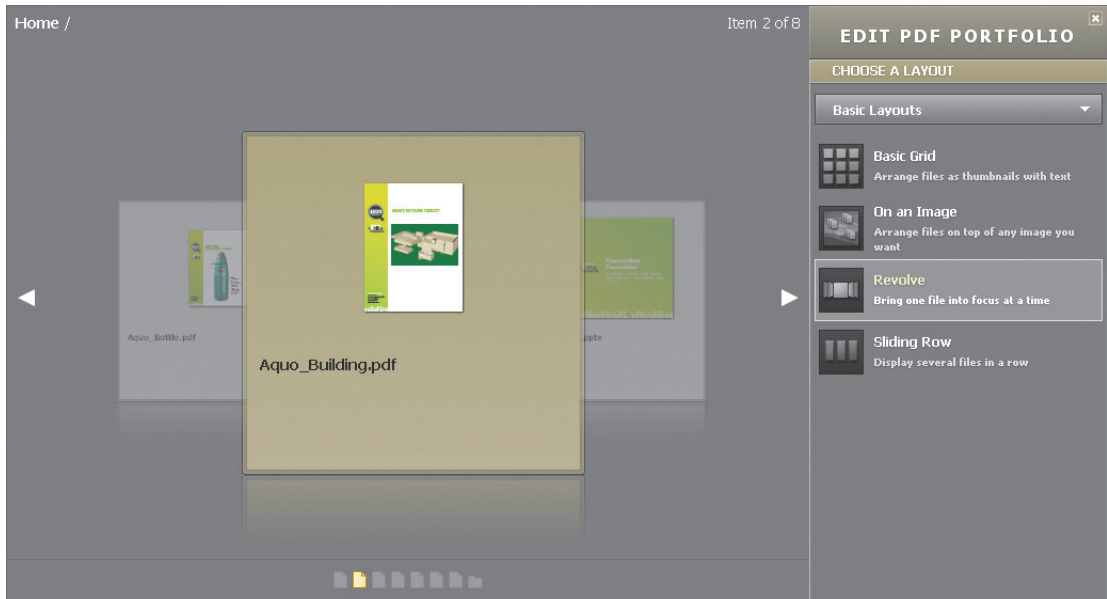
Selecting a layout

Acrobat 9 includes several layout options for PDF Portfolios. The layouts determine how component documents are displayed on the home page of the PDF Portfolio, and how the viewer navigates through the content. By default, the Basic Grid layout is applied. You'll preview the other layouts and choose one for this PDF Portfolio.

1 Click Choose A Layout in the Edit PDF Portfolio pane.

2 Click Sliding Row.
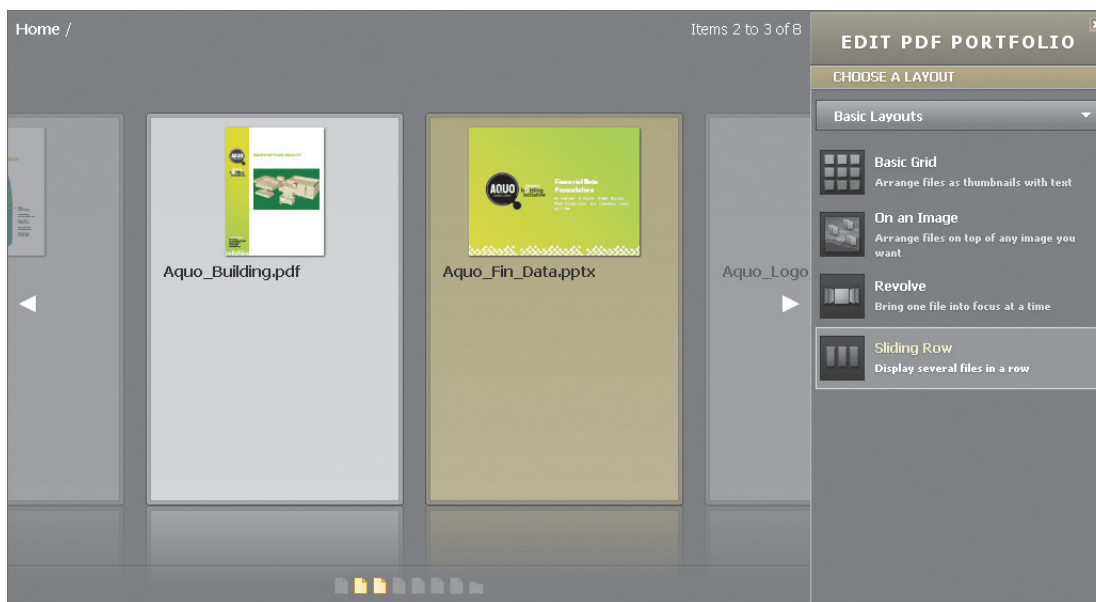
The documents are displayed in a row, with page icons below them to assist in navigation.

3 Click Revolve.

One document is in focus at a time, with two other documents visible behind it.

4 Select each of the other layouts to see how they display the documents in the PDF Portfolio.

5 Select Basic Layouts > Sliding Row for this PDF Portfolio.

Selecting a color scheme

You can further customize a PDF Portfolio by selecting which colors to use for text, backgrounds, and the cards that display component data. You'll select a custom color scheme to match the Aquo logo.

1 Click Select A Color Scheme in the Edit PDF Portfolio pane.

2 Click a Color Scheme swatch to see how it affects the colors.

3 Click Customize Color Scheme.

4 Click Primary Text Color. Then, select a color in the color picker, or type a color number in the box. We used 060606 for black text.

5 Customize the other colors in the scheme. We used 666666 (gray) for secondary text, 617E59 (green) for the background color, 480000 (burgundy) for the card color, and BDC089 (light gray) for the secondary card color.
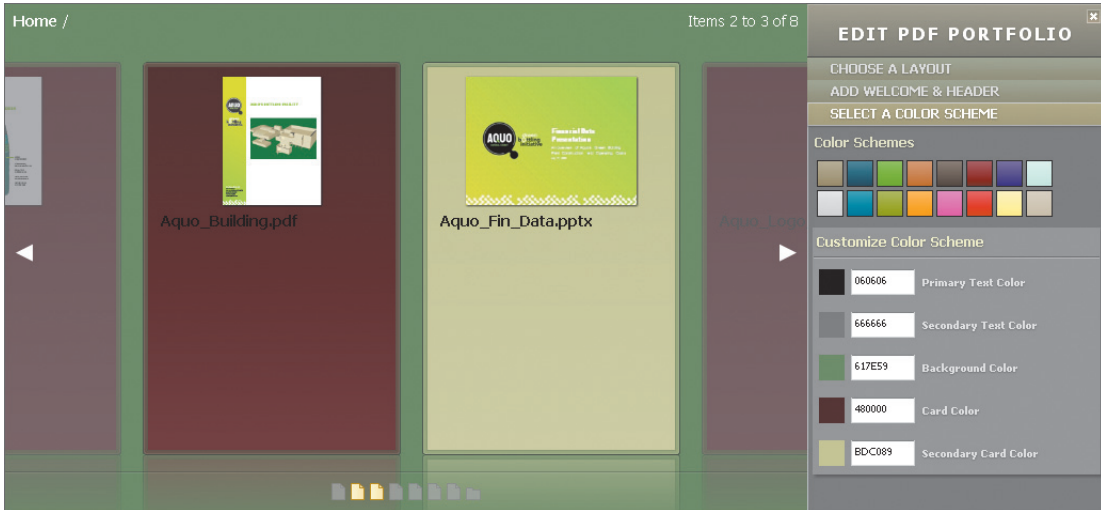
**6** Choose File > Save Portfolio.

Adding a header

If you're using Acrobat 9 Pro or Pro Extended, you can add a header to your PDF Portfolio. The header appears at the top of the layout. You can include text and a graphic in the header, including important information such as a logo, company name, and contact information. You'll add the company logo and the type and date of the meeting to the header.

1 Click Add Welcome & Header in the Edit PDF Portfolio pane.

2 Click Header

There are several header templates, including different text and graphic configurations.
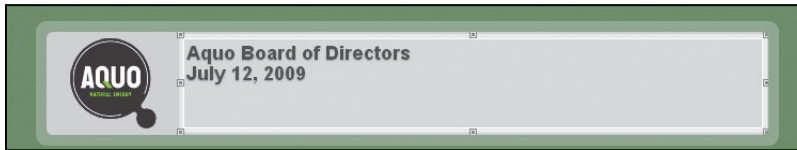
3 Click Logo & Text.
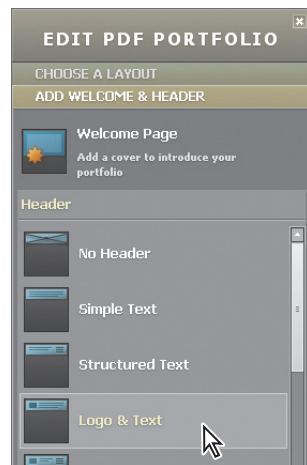
4 Click the Add An Image placeholder on the left side of the header.

5 Navigate to the Lesson05 folder, and double-click the Logo.gif file.

6 Click in the Add a Title panel of the header, and type **Aquo Board of Directors**.

**7** Press Enter or Return and type **July 12, 2009**.

8 Select "Aquo Board of Directors," and then, in the Title Text toolbar, change the font size to 22. Select center orientation.
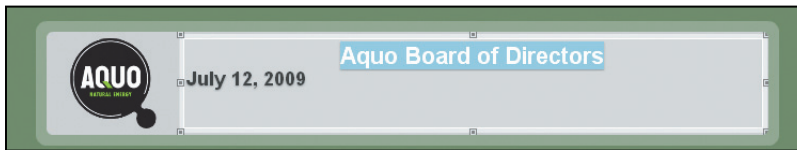
9 Select "July 12, 2009," click the Italic button, and then select center orientation.

10 Click the Background Color swatch on the right side of the toolbar.

11 Select a green that matches or complements the green in the Aquo logo, and click OK. (We chose color 617E59.)
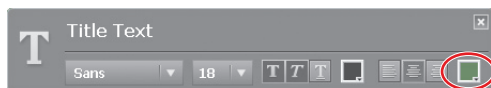

12 Close the Title Text toolbar.

Adding a welcome page

In Acrobat 9 Pro or Pro Extended, you can also include a welcome page to provide information or instructions to PDF Portfolio recipients, or to set a tone. The welcome page appears when the viewer opens the PDF Portfolio. The welcome page can include text, images, or both. It can even include a Flash video. You'll add a video of an animated logo to the welcome page for this PDF Portfolio.

1 Click Welcome Page in the Edit PDF Portfolio pane.

2 Select Flash Movie.

3 Click the Add A Flash File placeholder.
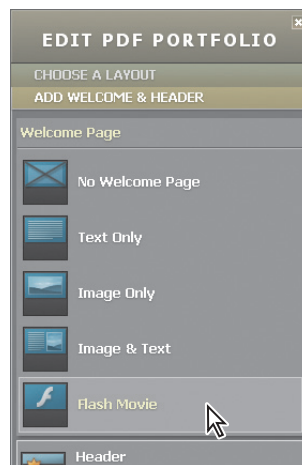
4 Navigate to the Lesson05 folder, select the Logo_Anim.swf file, and click Open.

5 Move the Scale slider to the right to increase the size of the logo.

6 Drag the movie to center it.

7 When you've positioned the movie where you want it, click Done.

8 Choose File > Save Portfolio to save the PDF Portfolio.

Viewing file details

The File Details view lists PDF Portfolio component files in table format, with columns such as file descriptions, size,and modification dates. To customize the columns that appear in the File Details view, click Specify File Details in the Edit PDF Portfolio pane. Select which columns to display and how to sort them.
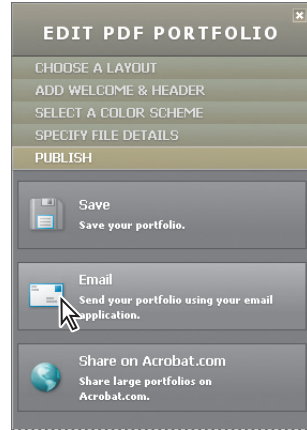
Sharing your PDF Portfolio

A PDF Portfolio is a PDF file, so you can share it any way you'd share any other PDF. You can simply save the file and transfer it to a recipient by email, on removable media such as a CD or DVD, or by uploading it to a server or website. However, Acrobat makes it even easier to share PDF Portfolios by email or by posting them to Acrobat.com, a secure web-based service. In this lesson, you'll email the PDF Portfolio to yourself.

1 Click Publish in the Edit PDF Portfolio pane.

2 Click Email.

Your default email application opens, with a new message open. The PDF Portfolio file is included as an attachment.

3 Type your email address in the To line, and add a brief message and subject line.

4 Send the message.

Securing a PDF Portfolio

You can control who opens, prints, or modifies your PDF Portfolio using the same security features you can use with other PDF files. You'll password-protect your PDF Portfolio to restrict how it may be used.

1 Choose Modify > Secure Portfolio With Password from the PDF Portfolio toolbar.
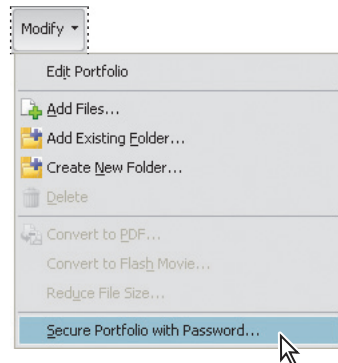
2 Click Yes when asked whether you want to change security settings.

3 In the Permissions area of the dialog box, select Restrict Editing And Printing.

4 Type a password in the Change Permissions Password box. Make sure it's a password you'll remember.

5 Choose High Resolution from the Printing Allowed menu, and choose None from the Changes Allowed menu. Viewers will be able to print components or the entire PDF Portfolio, but they won't be able to make changes to it unless they have the password.

6 Click OK.
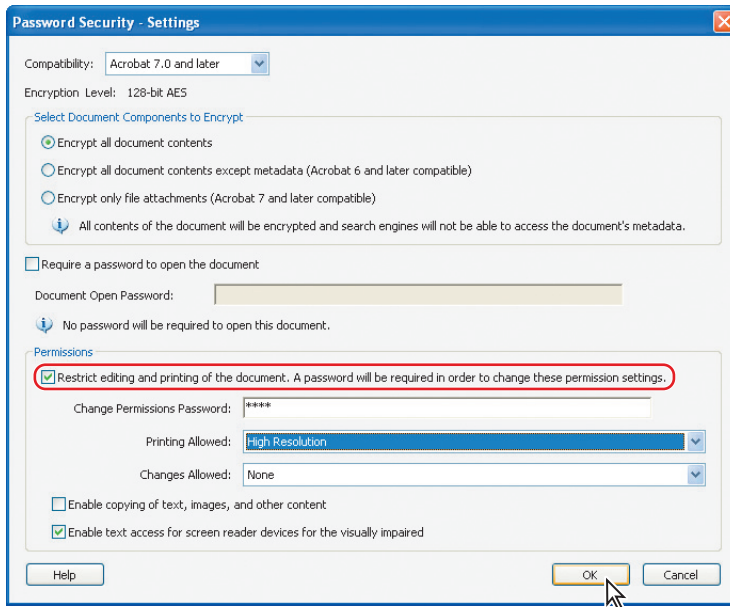
7 Click OK again to close the warning message.

8 Type the password again when prompted to confirm it.

9 Click OK if you see a message informing you that security settings will not be applied until you save the document.

10 If you want to apply the security settings to the PDF Portfolio, choose File > Save Portfolio. If you want to be able to edit the PDF Portfolio without using a password, close the PDF Portfolio without saving it.
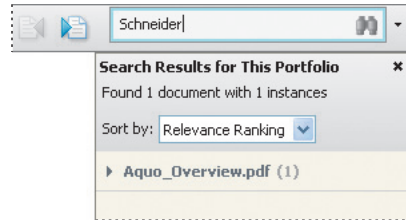
Searching a PDF Portfolio

You can search for specific words in all the components of a PDF Portfolio, even those that aren't PDF files. You'll use the search feature to find a quote by a particular person.

1 Click in the Search box on the right side of the PDF Portfolio toolbar.

2 Type **Schneider** to find a quote by the vice president of the company.

3 Click the binoculars icon (🔍).

The search results appear below the search box.

Merge to PDF

Sometimes you may want to combine files into a single PDF file without creating a PDF Portfolio. In a merged PDF file, all documents are converted into PDF files and then merged into a single PDF file as sequential pages.

To create a merged PDF file:

1   Choose File > Combine > Merge Files Into A Single PDF.

2   In the upper-right corner of the Combine Files dialog box, make sure that Single PDF is selected.

3   Click Add Files, and then select Add Files or Add Folders.

4   Select the files or folders you want to include, and click Add Files or Add Folders.

5   Arrange the files in the order you want them to appear in the merged PDF file. To reposition a file, select it and click Move Up or Move Down, or drag it into position.

6   If you want to include only some of the pages of a document, select it and click Choose Pages. Then select the pages you want to include.

7   Click Options to specify conversion settings, including whether to add bookmarks or enable accessibility features.

8   Specify a file size by clicking the small, default, or larger page icon.

The small file size uses compression and resolution settings that are appropriate for on-screen display. The default file size creates PDF files for business printing and viewing on-screen. The larger file size uses High Quality Print conversion settings.

9   Click Combine Files.

A status dialog box shows the progress of the file conversions. Some source applications may start and close automatically during the process.

Review questions

1 Name three advantages to creating a PDF Portfolio.

2 Do you need to convert documents to PDF to include them in a PDF Portfolio?

3 What is a welcome page?

4 How can you edit an existing PDF Portfolio?

5 True or False: You can search all documents in a PDF Portfolio, even non-PDF components.

Review answers

1 PDF Portfolios provide several advantages:

- You can add and remove component documents easily, including non-PDF files.
- You can preview component files quickly.
- You can edit individual files within the PDF Portfolio independently.
- PDF Portfolios contain all the components, so you can share them easily.
- You can sort component files by categories and arrange them in the order you want.
- You can print one, all, or any combination of components in the PDF Portfolio.
- You can search the entire PDF Portfolio, including non-PDF component files.
- The source files of a PDF Portfolio are not changed when you create the PDF, and changes you make to component files do not change the original files.

2 No. You can combine any documents in a PDF Portfolio, and they remain in their original format.

3 If you are using Acrobat 9 Pro or Pro Extended, you can add a welcome page to a PDF Portfolio. A welcome page appears when a recipient opens a PDF Portfolio. The welcome page may include instructions, information about the PDF Portfolio, or an introductory video.

4 To edit a PDF Portfolio, choose Modify > Edit Portfolio in the PDF Portfolio toolbar.

5 True. Acrobat can search any document in a PDF Portfolio, as long as an application that can open the file is present on the computer.