colophon

How I created this PDF Portfolio

Tools

Hardware and software tools used to create all documents within this portfolio are noted below.

Hardware:

- MacPro Dual Core 3GHz, 4G Ram, three 500G HDs.
- Apple Cinema HD 30" + Apple Cinema HD 23".
- HP Pavilion, Intel Dual Core 2.8Ghz, 2G Ram, 2 500G HDs.
- Two Sony 17" LCD Monitors.

Software used:

- MacOS X Leopard
- Windows Vista SP1
- Adobe Acrobat 9 Professional Extended.
- Adobe InDesign CS3.
- Adobe Photoshop CS3.
- Adobe Illustrator CS3.
- Adobe Flash CS3.

Fonts used:

- Adobe Avenir 35 Light.
- Adobe Avenir 65 Medium.
- Bradley Hand ITC TrueType.
- Courier New.
- Wingdings.
- Wingdings 3.

Design

All the PDFs contained in the Portfolio were laid out in Adobe InDesign on the Macintosh. After converting to PDF, the PDF Portfolios were assembled in Acrobat 9.0 on Windows where all the links, JavaScripts, and interactivity was added.

Adobe Flash files were designed on the Macintosh and added to the PDF Portfolio on Windows. Adobe Illustrator artwork and SWF files were likewise created on the Mac and imported on Windows.

The Mac was used in the design phase due to my having a total of 53 inches of screen real estate to keep open multiple CS3 windows during the design process.

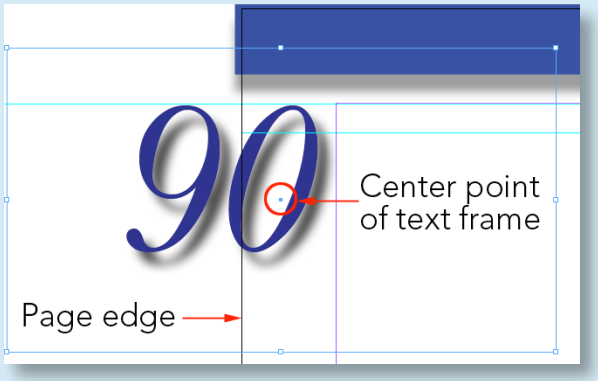
InDesign:

The 101 eTips documents are a revision from an earlier version created for Acrobat 8 and hosted on www.acrobatusers.com. Therefore all word processing was a matter of revising text in the old documents. This permitted me to avoid Microsoft Word to type the raw text and have to import the text in the InDesign layout.

- **Breaking page borders:** The numbers breaking the page borders on the left edge of the document was handled in Adobe InDesign. To create a graphic or text that falls off the page when converted to PDF you must pay attention to a few details.

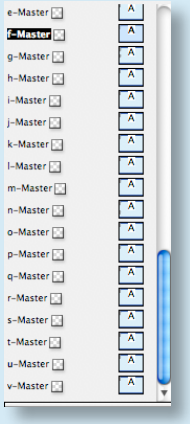
  The first item to understand is that an object or text must be placed on a Master page and the midpoint for the object/text frame must be inside the page area.

  If the center point for the object or image is outside the page area, when you convert to PDF and view the results in Acrobat you'll loose the object/text.



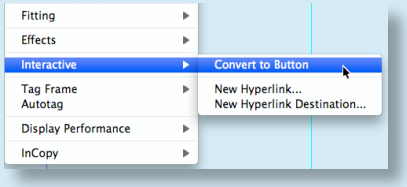
For objects such as Photoshop images and Illustrator artwork, if I needed to break a page border and the object's bounding box was too tight so I couldn't get the mid point inside the page edge, I imported a 1-pixel Photoshop transparent image, and grouped it together with the object to get the midpoint to fall within the page edge.

- **Master pages:** Each object that breaks a page edge requires an individual master page. I set up the A master page for the top and bottom banners, the icons, and the background color. Each new master page was based on the A master page. There are a total of 50 master pages in the 101 Tips document. The portfolio has two files that were divided into two documents after the InDesign file was converted to PDF.



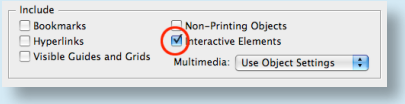
- **Converting to buttons:** When you add a graphic or text that breaks a page edge, you must place the item on a master page and convert it to button. Failure to convert the item to a button results in no object or text showing up in the PDF document.

  To convert an object or text frame to a button in InDesign, open a context menu and choose Interactive | Convert to Button. Don't worry about setting any actions to the button. It's used only for a graphic.



- **Exporting to PDF:** Notwithstanding color issues, that I address later, you export your layout from InDesign by choosing File | Export. In the Export dialog box, choose Adobe PDF for the Format and click OK. The Export Adobe PDF dialog box opens.

  The last issue you need to be concerned about when using graphics/text that break page borders is to check *Interactive Elements* in the Include section of the Export to Adobe PDF dialog box.



- **Images:** Screen captures were taken on the Mac by pressing Command/Shift 4 + Spacebar and on Windows using the Shift + Print Src keys. For foreground dialog boxes and windows, I used the Alt + Print Src keys. On Windows, when a screen capture is made the screen shot is saved to the clipboard. Once on the Clipboard, use File | Create PDF | From Clipboard and save the file as TIFF for importing into InDesign.

  When importing into Photoshop, files were sized to physical dimensions without resampling. If you resample screen shots in Photoshop the screen captures text will appear distorted. Not resampling the images creates larger file sizes but the total file size for this PDF Portfolio was only 6.7MB. The combined files in the portfolio are coincidently much smaller than the individual PDF files.

- **Color:** Before exporting to PDF from InDesign, I created a custom preset for the Distiller settings. In InDesign I chose File | Adobe Presets | Define. I chose the High Quality Print setting to insure image quality and font embedding and chose Acrobat 6 compatibility. I modified the Color settings and chose Convert All Colors to sRGB to use an RGB color palette with much richer colors.

  In InDesign I set up and RGB color palette so I could get the blue florescent look on the top and bottom banners. The color would appear much different if the colors were converted to CMYK.

- **Creating the PDFs:** For the Tips booklet, I used the settings described here for exporting the document and exported as a single PDF file. I wanted to keep the auto page numbers in order so I created one composite file.

  After creating the composite file I extracted pages to create the two PDF documents contained in the PDF Portfolio. All other files were exported to PDF using the same settings.

Working in Acrobat

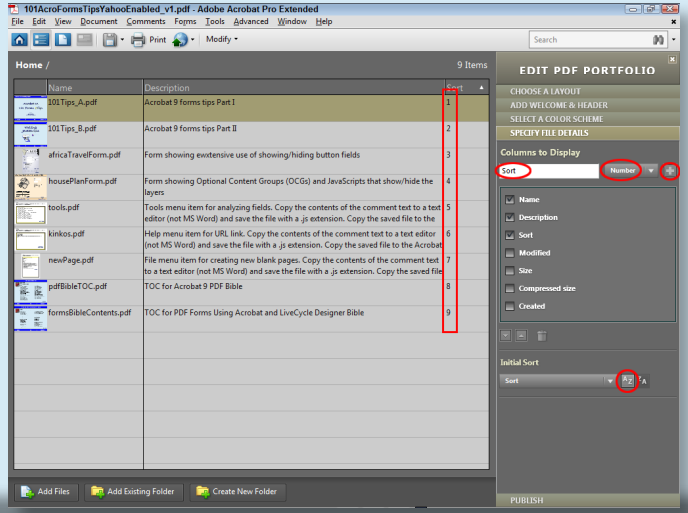
After the design files were converted to PDF, I copied the documents to a Windows machine and used Acrobat 9.0 Professional Extended to assemble the PDF Portfolio and add the navigation links. I set all buttons used for images added in InDesign to Read Only in the General tab in the Properties window.

Assembling the PDF Portfolio:

- **Adding files.** I chose File | Create PDF Portfolio. I then clicked the Add Existing Folder button and added the folder containing my design files converted to PDFs to assemble the portfolio.

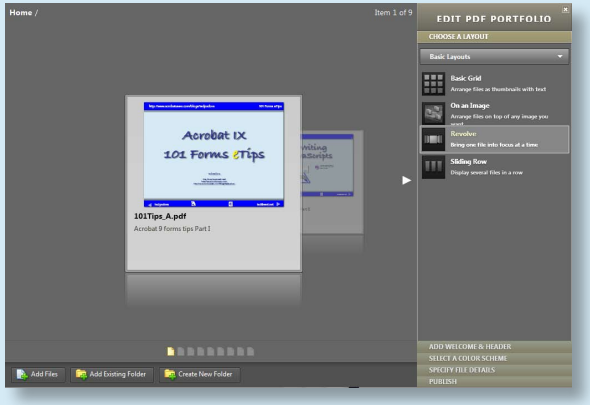
- **Sorting Files.** Files are organized in PDF Portfolios in an alpha order according to filename. I wanted the order to appear different than the default filename sort order.

  I clicked Specify File Details in the Edit PDF Portfolio panel and added a new column I named *Sort*. I chose Number from the drop down menu adjacent to the new name and clicked the + (plus) button to add a new column.

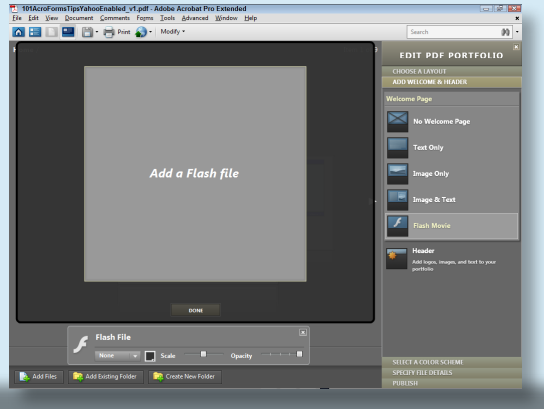


I typed the numbers in the new Sort column for the order I wanted and then clicked the ascending (A-Z) button to sort my documents in ascending order.

- **Choosing a layout.** I clicked the Choose a Layout button in the Edit PDF Portfolio panel and clicked the Revolve option from the Basic Layouts choices.



- **Add a Welcome.** Next, I clicked Add a Welcome & Header in the Edit PDF Portfolio panel and clicked the Flash Movie option for the Welcome page. In the left panel just click the Add a Flash file button and you can import an Adobe Flash SWF file.



Assembling the PDF Portfolio:

After the portfolio was assembled, it was time to add the navigation links to make it easier for a viewer to follow the journey of browsing the portfolio.

The JavaScripts and button actions that are included in the Writing JavaScripts chapter were all created before the portfolio was assembled. There are sample codes and scripts to invoke actions that don't have anything to do with browsing the portfolio. However when I needed to set up a link to another file in the portfolio, these links need to be added after you create a PDF Portfolio.

- **Linking to files in a PDF Portfolio.** A few examples of JavaScript code require opening a companion file that shows a little more detail than can be added in the tips booklet. I have some hot links that take you to the other files without having to use the PDF Portfolio interface to navigate documents.

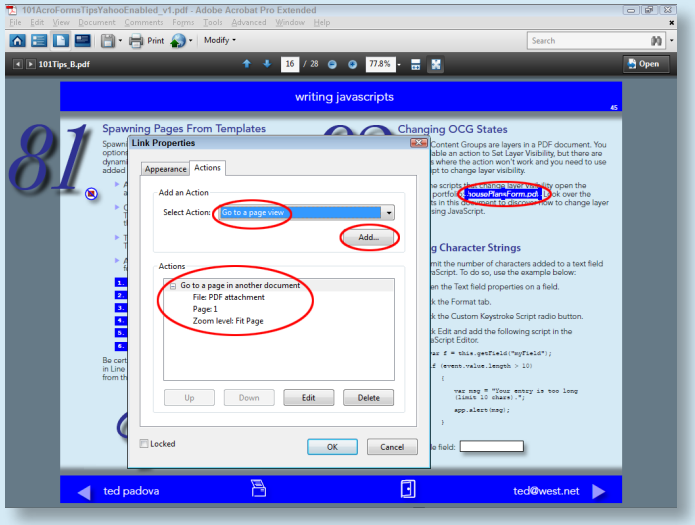
To link to another file in a PDF Portfolio, double click a file in the Home view to open the document in the PDF Portfolio Preview mode. Choose Tools | Advanced Editing | Link Tool. Notice the only Advanced Editing tool available while in Preview mode in a PDF Portfolio is this tool.

Create a link and define the appearance properties in the Link Properties dialog box.

Click Actions and choose *Go to a page view* from the Select Action drop down menu. Note that you cannot use *Open a file* for the action type.

Click the Add button and the Create Go to View dialog box opens. You can navigate your PDF Portfolio while this dialog box is open, so don't close the dialog until you click the Set Link button.

Click the Home icon (far left side of the PDF Portfolio toolbar) and you return to the Home view. From here you can open any file in the portfolio. In my example I opened the *housePlansForm.pdf* document. Double click the file in the Home view and the target document opens in Preview mode. Click Set Link in the Create Go to View dialog box and the link is set. You are then returned to the page where the link was created.



- **Returning to views.** I wanted the reader to view a companion file, then return back to the same tip they were reading when the link was clicked. Therefore I needed to add links in the companion files back to the page of origin when the reader clicked a link.

  In the companion documents, I used a button. I still needed to create the buttons after the PDF Portfolio was assembled, but the Button tool is not accessible while in Preview mode. You have to open a PDF in a new window when you want to add any form fields.

Continuing with the same example, I chose the *housePlansForm.pdf* document in the Home view and double clicked to open it in Preview mode. I then clicked the Open button (far right side of the PDF Portfolio toolbar) and the file opened in a new window. When in this view, you have access to all of Acrobat's tools and commands.

I clicked the Button tool from the Advanced Editing toolbar and added a button with a button face. In the Actions tab I chose *Go to a page view* again from the Select Action drop down menu. When I clicked the Add button the Create Go to View dialog box opened again.

At this point I was in the new window view and not within the PDF Portfolio interface. The easiest way to get back to the portfolio was to chose Window | <portfolio file-name>. Once back in the PDF Portfolio I could navigate to my document with the original link and click the Set Link button. When I returned to the file open in a new window I saved the document and closed the window. Doing so takes you back to the PDF Portfolio interface.

As you browse the files in this portfolio you can open the link and button properties and examine the settings.

This type of file linking is helpful for those who have a main document where you want viewers to browse a file in a linear read while offering support files to amplify topics descriptions and concepts. If left to the reader to branch out to view companion files, the reader can get frustrated trying to go back to the last page in the main document. Each time you return to the Home view, the file always opens on the first page and not the last page viewed in a document.

- **Navigating chapters.** The page navigation buttons used for navigation within a document in the tips booklet were all created before the PDF Portfolio was assembled. A few links however, needed to be created after the PDF Portfolio was assembled.

  The button on the last page of the first part of the booklet links to the first page in the second part of the booklet. Essentially this is a button that opens another file in the PDF Portfolio. The procedure for creating the button is the same as explained in the previous section where you use the Go to a page view action for a button. The first page in the second document has a link to move back to the last page in the first document.

  Creating navigation buttons like these can help you design eBooks that are broken up into separate chapters as individual files. As the reader clicks the arrow link buttons used in my example, pages scroll forward/backward thereby giving the reader the impression that it's one long document.

Ad Enabled PDFs

You may wonder why the booklet is divided into two files. Notice that the tips booklet includes Ads from Yahoo! You can create an account with Yahoo! to ad enable PDF files as a free service cooperatively offered by Adobe and Yahoo!

To get started with enabling PDFs with Yahoo! ads, log on to Adobe Labs at: http://labs.adobe.com/technologies/adsforpdf/ for more information on how to get started.

The one limitation that you have with using the service is the file sizes can be no more than 10MB. Since my single composite file was over 10MB, I needed to split the PDF into two parts.

After my portfolio was assembled and all the link actions added, it was time to submit the files for enabling with Yahoo! ads. You must add all links before submitting files for enabling with ads. Once the file is enabled, it's like a secure file preventing you from all editing features.

- **Renaming files.** You submit files for enabling and within 10 minutes your files are returned via an email attachment. When the files are returned, the filenames are appended with *-registered*. Since you set up your original links to files without the appended text at the end of the filename, you need to rename the files to return to the original names before you submitted them for ad enabling.
- **Replacing files.** You don't have a Replace File command in the PDF Portfolio interface. You need to simply delete the old files and add the ad enabled files to your PDF portfolio.

  To delete a file from a PDF Portfolio, view the files in the Home view and open a context menu on a file you want to delete. From the menu choices click Delete.

  To add the ad enabled files, click the Add Files button in the Home view. After you add the files, you'll need to revisit the Details view and add the sort numbers to sort the files in the order you want your readers to see them.

  As a last step, choose File | Save Portfolio As and rewrite the entire portfolio file to optimize it.

And that's basically how I created the portfolio you're viewing now.

Commercial

ACROBAT USER COMMUNITY

To learn more about PDF Portfolios, using Adobe Acrobat 9.0, Adobe LiveCycle Designer, and discovering all the wonderful tools and features you have for creating PDF forms, become a regular visitor to Acrobat Users (www.acrobatusers.com)