

# Distributing PDF Documents



*Platform independence and small file sizes make PDF an attractive format in which to distribute your documents on the Web, an intranet, or a CD. In this lesson, you'll put the finishing touches on a collection of documents to finalize them for electronic distribution.*

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

- Examine the issues associated with distributing PDF documents.
- Collect documents for distribution.
- Compare image quality and file size between two PDF documents.
- Examine sample *Welcome* documents.
- Add links to a *Welcome* document.
- Add document information to a PDF document.
- Index a document collection with Acrobat Catalog.
- Test PDF documents in a staging area.
- Examine a Web server administrator's checklist.

This lesson will take about 45 minutes to complete.

If needed, remove the previous lesson folder from your hard drive, and copy the Lesson13 folder onto it.

## **Distributing PDF documents**

PDF's ability to faithfully maintain the formatting of a document while offering smaller file sizes, searchable text, printability, and integration with the most popular Web browsers, makes it a popular choice for distributing documents on the Web, company intranets, CDs, and via e-mail. Of course, you could simply create your PDF documents and send them out to the world without any more effort than printing. But with a little extra effort, you can make the information in your documents more accessible to your users and thereby make the documents more successful.

### **Collecting the documents to publish**

The first step is to create or collect your PDF documents. In this project, you'll use documents from the Seybold 98 Internet Publishing archives to prepare, arrange, stage, and test for distribution. In this case, you can assume that the contents of the documents you are going to use are complete.

You should be at the point where you would normally print the final copy of those documents. But you must first check a few things—image quality, file size, and filenames—to ensure that the documents you distribute have the desired quality, are as efficient as possible, and work across computer platforms.

### Checking image quality and file size

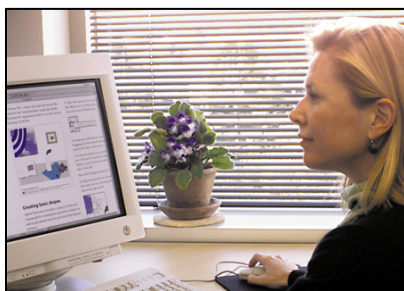
Making bitmap images small enough for network distribution or for mass storage on CD volumes generally requires compression—saving images in a way that uses less disk space.

For continuous-tone images such as photographs, JPEG Medium compression (the Acrobat Distiller and PDF Writer default) saves a lot of space with little loss of quality. You can choose different compression settings to fine-tune the balance between image quality and file size.

In this part of the lesson, you'll open and view an image that has had no compression applied to it, and then choose a compression setting in Distiller and process the PostScript version of that image. You'll then compare the image quality and file size of the original file with the compressed file.

- 1 Start Acrobat.
- 2 Choose File > Open. Select Image.pdf in the Lesson13 folder, located inside the Lessons folder within the AA4\_CIB folder on your hard drive, and click Open. Then choose File > Save As, rename the file **Image1.pdf**, and save it in the Lesson13 folder.
- 3 Position the pointer on the triangle next to the Magnification pop-up menu in the status bar, and choose 400% to zoom in on the image.

Examine the image. No compression was applied to this file when it was converted to PDF.



*Uncompressed Image1.pdf at 100% magnification*




*400% magnification*

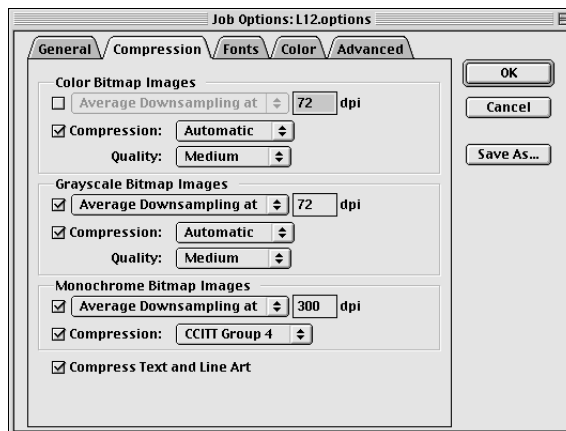
## Choosing a compression setting

Now you'll choose a compression setting in Distiller and convert the PostScript version of this file to PDF again.

- 1 Start Acrobat Distiller.
- 2 In the Distiller window, choose Settings > Job Options, and click the General tab. For Compatibility, choose Acrobat 3.0 (the default setting).

 For information on compatibility settings, see “Setting the General job options” in Chapter 3 of the online Adobe Acrobat User Guide.

- 3 Click the Compression tab.
- 4 In the Color Bitmap Images section, select the following options:
  - In Windows, deselect Resampling; in Mac OS, deselect Average Downsampling At.
  - Select Compression and choose Automatic.
  - For Quality, choose Medium.




- 5 Click Save As. Name the Job Options settings **Image.options**, save the job options in the Settings folder, and click Save.

Before continuing, in Windows, you can choose to save Job Options settings; in Mac OS, you must save the settings.

- 6 Click OK.

The Automatic Compression option determines the best compression method for color and grayscale bitmap images (JPEG or ZIP) and applies the correct setting. For example, JPEG compression is used for images with smooth color changes, such as scanned photographs. ZIP compression is used for images with sharp color changes, such as screen shots of dialog boxes.

The image in this file has smooth color changes; therefore, JPEG Medium will be applied to this image.

 For more information on compression settings, see “Applying compression and resampling to PDF files” in Chapter 3 of the online Adobe Acrobat User Guide.

Now you’ll use Distiller to convert a version of the Image document that was saved as a PostScript file. Converting a file to PostScript and then using Distiller to convert it to PDF requires more manual steps than other conversion methods. But it gives you better control over the conversion settings by letting you choose specific resampling and compression methods for bitmap images in the documents; lets you maintain all the formatting, graphics, and photographic images from the original document; preserves EPS graphics; and lets you convert PostScript files to PDF in a batch process.

Now you’ll compare the file that has had compression applied against the uncompressed file.

**7** In Distiller, choose File > Open. Select Image.ps in the Lesson13 folder, located inside the Lessons folder within the AA4\_CIB folder on your hard drive, and click Open. Rename the file **PSImage.pdf**, and save it in the Lesson13 folder.

Distiller converts the file, displaying information about the conversion.

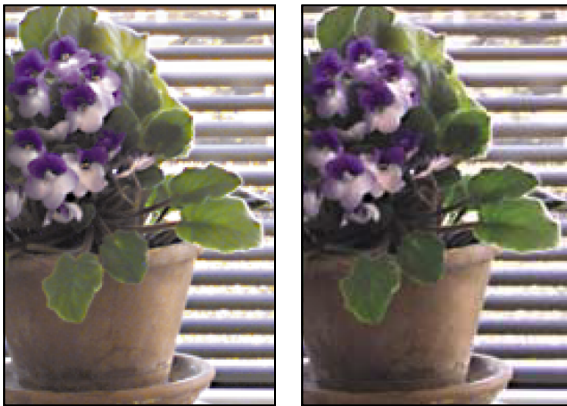
**8** Exit or quit Distiller.

## Comparing the files in Adobe Acrobat

Now you’ll compare the image quality and file size of the original file with the compressed file.

**1** In Acrobat, choose File > Open. Select PSImage.pdf, which you just converted to PDF and saved in the Lesson13 folder, and click Open.

- 2 Choose Window > Tile > Vertically to compare Image1.pdf and PSMImage.pdf. (Only Image1.pdf and PSMImage.pdf should be open. If other files are open, close them, and choose Window > Tile > Vertically again.)
- 3 Choose 400% magnification from the status bar at the bottom of the PSMImage.pdf document. Adjust your viewing area to view the same portion of the image in each file.



*Uncompressed Image1.pdf*

*Compressed PSMImage.pdf*


As you can see, it's very difficult to detect any quality degradation in the PSMImage.pdf file that had the default compression applied to it. But you can also see a significant difference in the file size—Image1.pdf is 1 MB and PSMImage.pdf is 64K.

- 4 When you have finished viewing the files, choose Window > Close All.

### Checking filenames

Adobe recommends that your filenames consist of one to eight characters (no spaces) followed by an extension (a period and from one to three characters) of your choice. Use .pdf as the file extension for your PDF documents. Most Web browsers, Web servers, and versions of Microsoft Windows have been configured to associate .pdf files with Adobe Acrobat, Acrobat Reader, or the Web Capture command. If properly configured, these applications will launch the appropriate program when PDF files are encountered.

You can view PDF documents in Web browsers compatible with Netscape Navigator 3.0 (or later) or Internet Explorer 3.0 (or later). The Web browser you use, the Web server, and several other factors determine how your system handles the PDF documents.

 For more information on viewing PDF documents in Web browsers, see “Viewing PDF documents on the Web” in Chapter 1 of the online Adobe Acrobat User Guide.

### **Naming PDF files for cross-platform compatibility**

*When you name PDF documents and build indexes for cross-platform document collections, the safest approach is to observe MS-DOS® filenames conventions. Although Acrobat has a sophisticated mapping filter for identifying formats of indexed documents, ambiguities caused when names created for one platform are mapped to usable names on another platform can slow down the searches. There may even be cases where this prevents documents from being located.*

*Consider the following guidelines when naming PDF files and documents:*

- *If you are using the Mac OS version of Catalog to build a cross-platform indexed document collection, and if you don't want to change long PDF filenames to MS-DOS filenames, select Make Include/Exclude Folders DOS Compatible in the Index group of preferences before you build your index. If you check this preference, you must use MS-DOS filenames conventions for the folder names (8 digits with 3 digit extension); however, you do not have to use these conventions for the names of the files inside the folders.*
- *If you are using Mac OS with an OS/2® LAN Server, and if you want to be sure that the indexed files are searchable on all PC platforms, either configure LAN Server Macintosh (LSM) to enforce MS-DOS filenames conventions, or index only FAT volumes. (HPFS volumes may contain unretrievable long filenames.)*
- *If you are indexing PDF documents with long filenames that will be truncated for Windows use, be consistent in your use of either the Windows or Mac OS version of Catalog to build or update the index.*
- *If you are creating documents that will be searched only by Macintosh users, do not use deeply nested folders or pathnames longer than 256 characters.*
- *If you are planning to deliver the document collection and index on an ISO 9660-formatted CD, you should use ISO 9660 filenames. With the Macintosh version of Catalog, check Log Compatibility Warnings in the Logging preferences to be warned of noncompliant filenames. For more information, see “Naming PDF documents” in Chapter 11 of the online Adobe Acrobat User Guide.*


**Important:** Avoid using extended characters, such as accented characters and some non-English characters, in the names of files and folders used for the index or the indexed files. The font used by Catalog does not support character codes 133 through 159.

—From the online Adobe Acrobat User Guide, Chapter 11

## Preparing a Welcome document

In many cases, you may want to distribute material in a collection of PDF documents rather than in a single document. Users may have difficulty, when first opening a CD or visiting a Web site, determining where to start or what's in the document collection. It often helps other users if you include a "welcome" PDF page in your collection, to point them in the right direction.

On the Web or an intranet, you might want to use an HTML Web page as your welcome document. The page typically gives an overview of the documents and provides links to specific places in them.

 *On CD volumes, you should also include a ReadMe text file that contains Acrobat Reader installation instructions and any necessary last-minute information about the CD.*

## Adding links to a Welcome document


A *Welcome* document has been provided for you to use with this lesson. The Welcome document includes a table of contents for the Seybold 98 Internet Publishing newsletters. Now you'll open the document and add cross-document links to some of the documents in the Lesson13 folder.

**1** In Acrobat, choose File > Open. Select Welcome.pdf in the Lesson13 folder, located inside the Lessons folder within the AA4\_CIB folder, and click Open. Then choose File > Save As, rename the file **Welcome1.pdf**, and save it in the Lesson13 folder.



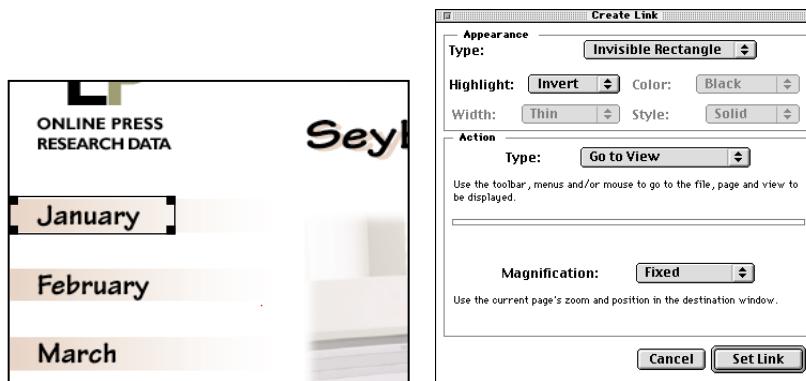
**2** If desired, resize the Welcome1.pdf document.

Now you'll use the link tool to add some cross-document links.

**3** Select the link tool () , and drag a link rectangle to enclose "January."



- 4 For Appearance Type, choose Invisible Rectangle.
- 5 For Action Type, choose Go to View.



6 With the Create Link dialog box still open, choose File > Open, select ip0198.pdf in the Seybold Reports folder, located inside the Lesson13 folder, and click Open. The file opens in front of the Welcome1.pdf document.

7 In the Create Link dialog box, choose a magnification level with which you are comfortable, as follows:

- Fixed displays the destination at the magnification level and page position in effect when you create the bookmark or link. Use the zoom-in or zoom-out tool, the view buttons in the tool or status bar, or the scroll bar to adjust the view before accepting this setting.
- Fit View displays the visible portion of the current page as the destination. The magnification level and window size vary with monitor resolution.
- Fit in Window displays the current page in the destination window.
- Fit Width displays the width of the current page in the destination window.
- Fit Height displays the height of the current page in the destination window.
- Fit Visible displays the width of the visible contents of the current page in the destination window.
- Inherit Zoom displays the destination window at the magnification level the readers are using when they click the bookmark or link.

8 Click Set Link. The Welcome1.pdf document appears frontmost on-screen.

9 Using the hand tool, click the link to test it.

**10** Using the link tool, add a second link by dragging a link rectangle to enclose “April.” Then in the Create Link dialog box, do the following:

- For Appearance Type, choose Invisible Rectangle.
- For Action Type, choose Go to View.
- Choose File > Open, select ip0498.pdf in the Seybold Reports folder, located inside the Lesson13 folder, and click Open.
- Accept the magnification level you chose in step 7.
- Click Set Link.

**11** Using the hand tool, click the link to test it.

**12** Choose File > Save to save the Welcome1.pdf file.

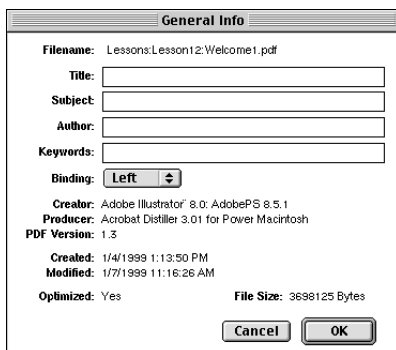
**13** Close all of the files except the Welcome1.pdf file. The files must be closed before they can be batch processed, which you’ll do later in the lesson.

## Adding Document Info data to PDF files

Document information screens provide users with basic information about a file and another way to index a file in a collection of documents. The Title, Subject, Author, and Keyword fields in the General Document Info dialog box can be entered and edited in Acrobat.

First, take a look at the information loaded in the Document Info fields for the Welcome1.pdf document.

**1** Choose File > Document Info > General.



By default, the filename Welcome.ai appears in the Title field and the Subject, Author, and Keyword fields are empty. The other entries represent file information generated by the PDF creator.

Because many Web search engines use the Document Info fields to search for information and display results in a Search Results list, you should fill in Document Info fields for each document you distribute. The filename often is not an adequate description of the document. In addition, you should fill in the Document Info text boxes for all of your files if you plan to index your document collection with Acrobat Catalog. For more information on creating indexes with Acrobat Catalog, see Lesson 11, “Building a Searchable PDF Library and Catalog.”

In this lesson, you’ll enter Document Info information in only the Welcome1.pdf file. In a normal workflow, you should enter Document Info information for all files in a document collection.

**2** In the General Info dialog box, fill in the following text boxes:

- Title. (We entered “Online Press Research Data.”)
- Subject. (We entered “Internet Publishing.”)
- Author. (For example, enter your name.)
- Keywords. (We entered “Seybold, Internet publishing, Online Press.” Be sure to enter a comma and space between each keyword.)

**3** Click OK.

**4** Save the file and close it.

Once you have finished entering Document Info in all the files in your document collection, you are ready to stage, optimize, and index your documents.

## Organizing the staging area

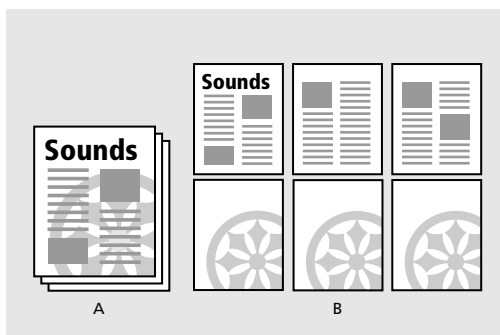
When you have collected all the PDF documents and the Acrobat Reader installer, set up a staging area (that is, a central location or folder) for the collection on a network file server. Then test the document links, bookmarks, actions, forms, and indexes on the server to make sure everything works the way you planned.

In a normal workflow, you should set up a staging area on a network file server if possible, and keep a copy of the original files in another location. Backup copies can save you from having to re-create files if, by chance, they are mistakenly deleted or corrupted. For this lesson, you'll use the Lesson13 folder as the staging area.

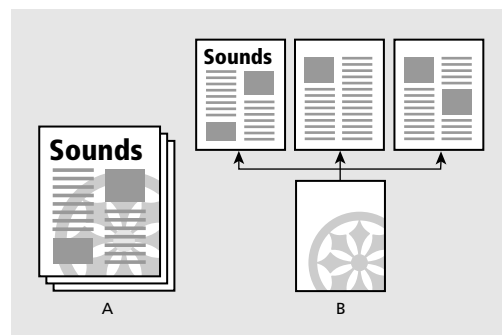
Organizing the documents in folders lends an intuitive organization and leads readers to the information they need. Before you publish your document collection, consider asking others to use the folder structure in your staging area to make sure your organization is easy to understand.

## Optimizing PDF documents

Optimization consolidates and reorders your PDF documents, and in most cases, reduces their file size significantly. Acrobat removes duplicate background objects (text, line art, and images), replacing them with pointers to the first occurrences of those objects. Optimizing also reorders objects in the PDF file format for *page-at-a-time downloading* over the Internet. With page-at-a-time downloading (also called byte-serving), the Web server sends only the requested page of information to the user, not the entire PDF document. This is especially important with large documents, which can take a long time to download from the server.



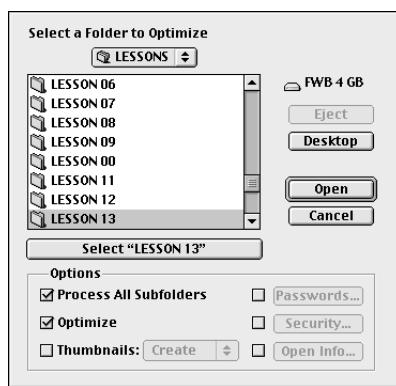
Not optimized  
A. Original page B. Repeated background



Optimized  
A. Original page B. Repeated background

You can optimize a file every time you choose the Save As command by selecting the Optimize option (selected by default), or you can optimize a collection of documents all at once by choosing File > Batch Process. In this section, you'll batch-optimize the files in the Lesson13 folder all at once.

- 1 In Acrobat, choose File > Batch Process.
- 2 Select the Lesson13 folder:
  - In Windows, double-click to select the Lesson13 folder, and click OK.
  - In Mac OS, click to select the Lesson13 folder, and click Select "Lesson13."



The Batch Processor Progress dialog box appears, with a message box and an optimization status bar displaying the progress of the optimization process.

- 3 When all files in the folder have been processed, click Close.

The files are almost ready for distribution.

### Optimizing PDF documents for the Web

You can choose these additional options when batch processing:

- *Process All Subfolders* also optimizes PDF documents in any subfolders in the selected folder.
- *Thumbnails* creates or deletes thumbnails in the documents. If you create or delete thumbnails for optimized documents, the documents are reoptimized.

PDF documents that are already optimized, are read-only, require an open password, or are stored in a location for which you do not have write access are not optimized (unless you are creating or deleting thumbnails in optimized files). The Optimize.log file, located in the folder that contains the optimized documents, lists any documents that were not optimized in the process.

*To stop the batch optimization process:*

*Click Stop in the Batch Processor Progress dialog box. The process stops after the document currently being optimized has been completed (which may take some time). Any documents processed before you click Stop are already optimized.*

*To find out if a PDF document has been optimized:*

*Choose File > Document Info > General, and look at the Optimized option.*

—From the online Acrobat User Guide, Chapter 13

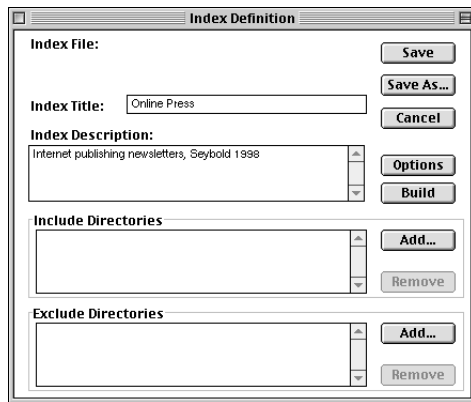
## Indexing your document collection

If your document collection will be distributed on a CD, you should index the collection using Acrobat Catalog so that users can search the documents quickly. However, an index created by Catalog is not searchable over the World Wide Web or a company intranet. To make your PDF documents searchable over the Web or your intranet, they must be indexed by a Web search engine that supports indexing PDF documents. For a list of Web search engines that support PDF indexing, see [www.adobe.com/proindex/acrobat/websearch.html](http://www.adobe.com/proindex/acrobat/websearch.html).

Now you'll index the documents in the Lesson13 folder.

- 1 Start Acrobat Catalog.
- 2 In Mac OS, choose Edit > Preferences, make sure that Make Include/Exclude Folders DOS Compatible is deselected, and click OK.
- 3 In Catalog, choose Index > New (Windows) or File > New (Mac OS), and enter a title for the index. (We used "Online Press.")

4 Enter information about the index in the Index Description box. (We entered “Internet publishing newsletters, Seybold 1998.”)



- 5 Click the Add button in the Include Directories box, and select the Lesson13 folder:
- In Windows, double-click to select the Lesson13 folder, and click OK.
  - In Mac OS, click to select the Lesson13 folder, and click Select “Lesson13.”
- 6 Click Build, and name the index **onlinepr.pdx**.
- 7 Open the Lesson13 folder, save the index inside that folder, and click Save.
- 8 When the message Index Build Successful appears in the Catalog message window, exit or quit Catalog.

## Automatically loading an index


Before you can search an index, that index must be loaded in the available index list. You can load an index manually, or you can associate an index with a file so that the associated index is added automatically to the available index list whenever the file is opened.

In this section, you’ll associate the Seybold 1998 Newsletters index with the Welcome1.pdf document, so that whenever the Welcome document is opened, the Seybold 1998 Newsletters index will automatically be available for searching.

- 1 Return to Acrobat.

2 Choose File > Open, select Welcome1.pdf in the Lesson13 folder, and click Open.



3 Click the Search button (  ) in the command bar, and click Indexes. Notice that the Online Press index is not listed as an available index.

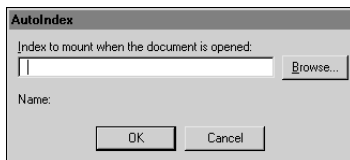
4 Click OK.

5 Click the close box in the Acrobat Search dialog box.

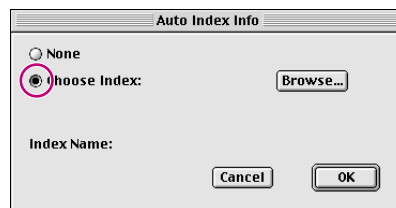
6 Choose File > Document Info > Index.

7 Locate the index:

- In Windows, click Browse.
- In Mac OS, click Choose Index and then click Browse.



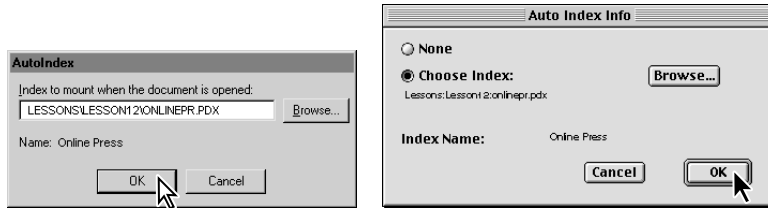
*Click Browse and locate index (Windows).*



*Click Choose Index and Browse (Mac OS).*



- 8 Select onlinepr.pdx, located in the Lesson13 folder. Click Open and then click OK.




*Associating index with Welcome1.pdf file in Windows (left) and in Mac OS (right)*

- 9 Choose File > Save As, make sure that Optimize is selected, and save Welcome1.pdf in the Lesson13 folder. Click Yes (Windows) or Replace (Mac OS) to confirm replacing the file. The Save As command lets you save a smaller, optimized version of the finished file.
- 10 Close the file.

## Testing an associated index

Now you'll reopen Welcome1.pdf to see the index automatically associated with the file. It's a good idea to check that the associated index works as expected before distributing your documents.

- 1 Choose File > Open, and reopen the Welcome1.pdf file.
- 2 Click the Search button (  ) in the command bar.
- 3 In the Acrobat Search dialog box, click Indexes.

The Online Press index now appears as an available index in the Index Selection dialog box.

- 4 Click OK.
- 5 Enter **multimedia** in the Find Results Containing Text box, and click Search.

The Search Results palette lists 9 of 28 documents containing the term.

- 6 Select any of the documents in the list, and click View to view the file.
- 7 When you have finished viewing the file, close it.

Once you have completed all cross-document links and indexed your collection, it is important to maintain relative file relationships. (A relative file relationship keeps the same organization of a file in a folder, within the same hierarchy of folders and subfolders.) Moving a file outside of the folder in which a link was created or that Catalog indexed will alter the relative file relationship. This causes linking and searching to produce error messages instead of link destinations and highlighted search terms.

## **Adding Acrobat Reader installers**

Acrobat Reader is available free of charge for distribution with your documents so that users can view your PDF documents. It's important either to include a copy of the Reader installers on your CD or to point Web users to the Reader installers on the Adobe Web site at [www.adobe.com](http://www.adobe.com).

If you're including the Reader installers on a CD-ROM, include a ReadMe text file at the top level of the CD that describes how to install Reader and provides any last-minute information. If you're posting the Reader installers on a Web site, include the Reader installation instructions with the link to the downloadable software.

If you're distributing documents on the Web, you'll probably want to point users to the Adobe Web site for the downloadable Reader software.

You may make and distribute unlimited copies of Reader, including copies for commercial distribution, as long as each copy you make and distribute includes all of the following:

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A special “Includes Adobe Acrobat” logo is available from Adobe for use when distributing Reader. See the Adobe Web site for details.

## Testing your document collection

When you have staged your documents and the Reader installers by organizing them in one location, it’s important to test your document links, bookmarks, actions, forms, and indexes to ensure that everything works the way you planned.

In this lesson, you tested your document links and the associated index as you prepared the document collection. You can test documents in other collections that you’re preparing by opening the documents and randomly testing any links, bookmarks, actions, and forms in the document, and by using the Search command to test any associated indexes.

## Double-checking the checklist

You should double-check content, layout, artwork, and so forth of any document that you intend to distribute. As you have seen with this lesson, electronic documents add a few other items to your checklist. We have created a checklist to help you double-check the basics. Of course, feel free to add to the list to help you complete your own projects.

Checklist:

- Content is complete.
- Electronic enhancements, links and bookmarks, and so forth are complete.
- Document Info has been added to all files.
- Filenames have one to eight characters plus a .pdf extension, following the DOS naming conventions.
- Files are organized appropriately.
- Optimization is complete.

- Files are indexed (if intended for CD distribution).
- Files have been tested in staging area.
- The file structure is maintained when delivering your document collection to your Web server administrator or CD creator.

This completes the lesson. You have learned how to organize and prepare documents for conversion to PDF and electronic distribution. For additional practice in building indexes from a series of PDF files, see Lesson 11, “Building a Searchable PDF Library and Catalog.”

## Review questions

- 1 Describe three ways you can make a document collection more accessible to users.
- 2 Why is providing a Welcome document important?
- 3 Why is it recommended that you name your files with one to eight characters plus a .pdf extension?
- 4 What does optimization do to your PDF files?
- 5 Are you allowed to include the Acrobat Reader installers on CDs that you publish?

## Review answers

- 1 You can make the information in a document collection more accessible to users in these ways:
  - By compressing files to ensure that they're small enough for network distribution or for mass storage on CD volumes.
  - By using filenames that work across computer platforms.
  - By including a Welcome document with links to the document contents.
  - By ensuring that the collection includes document information such as title, subject, and keywords.
  - By organizing the files intuitively.
  - By indexing the document collection.
  - By optimizing the files for online use.
  - By including the Acrobat Reader application for viewing the documents.
  - By testing any electronic enhancements such as bookmarks, links, and forms, to make sure that they work as expected.
- 2 Users may have difficulty determining where to start when first opening a CD or visiting a Web site, or determining what's in the document collection. A Welcome PDF document can give users an overview of a document collection and can include links to specific places in the collection.

- 3** Naming files with one to eight characters (no spaces) plus a .pdf extension causes properly configured applications to launch the appropriate program when they encounter PDF files. Most Web browsers, Web servers, and versions of Microsoft Windows have been configured to associate .pdf files with Adobe Acrobat, Acrobat Reader, or the Web browser plug-in.
- 4** When Acrobat optimizes PDF documents, it consolidates background objects (text, line art, and images) to reduce the file size significantly, and reorders objects in the PDF file format for page-at-a-time downloading over the Internet. With page-at-a-time downloading (also called byte-serving), the Web server sends only the requested page of information to the user, not the entire PDF document.
- 5** Yes, Adobe allows you to distribute the Acrobat Reader installer and application with PDF documents that you publish.