Creating PDF Portfolios for Documents with Digital Signatures

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Who

Anyone that combines documents that contain digital signatures needs to work with portfolios. This includes someone that just adds a cover sheet.

What

Adobe pdf portfolios are pdf containers for other pdf files. Portfolios can be used to group and organize other pdf files without changing the individual file properties.

Why

The main reason the portfolio format is being used is to accommodate Digital Signatures. PDF documents that contain digital signature should not be edited. This includes prepending and appending the document. Prepending and appending are considered edits no matter how small. The portfolio format groups the separate documents together. Grouping separate documents together is not considered an edit.

Any time a digitally signed document is edited, the digital signatures will be removed or invalidated. This is not an application flaw. This is an application requirement and it is also ND administrative code requirement (rule), NDAC 28-02.1-08-02-4.

> "The digital signature must be unique to, and under the sole control of, the person using it; it must also be capable of verification and be linked to a document in such manner that **the digital signature is invalidated if any data on the document is altered.**"
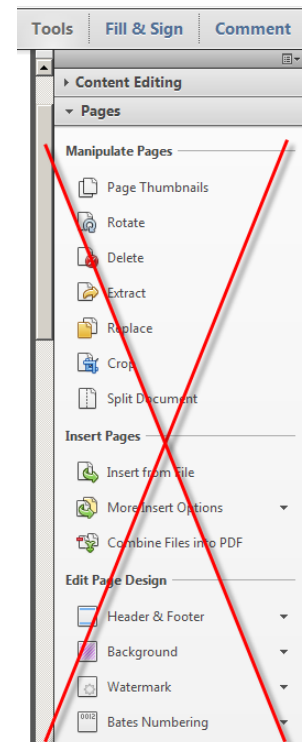
How

Before we get to "How To Create a Portfolio", let's briefly discuss what not to do. Do Not Delete or Insert Pages after digital signatures have been used. Usually these tools will be disabled if you are appending or prepending from a digitally signed document. However if you start from a document that isn't digitally signed and you merge a document with digital signatures, the digital signatures will be stripped from the document. Instead of inserting pages, a portfolio should be created.
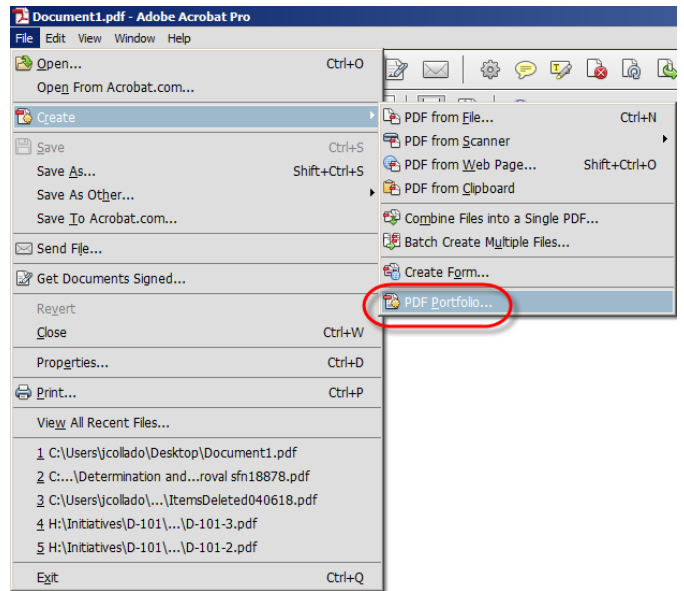
First, you will need Adobe Acrobat Pro or Standard. Adobe Reader (free pdf reader) doesn't have the create portfolio feature. You will also need Adobe Flash Player. This is a free application that can be installed from the web. However you will need administrative computer rights to install it. If you are missing the adobe flash player you should be able to call the help desk to get this app installed. A work order for this application is not required.

If you're not sure if your flash player is working, check out the animation in step 5 of the following link.

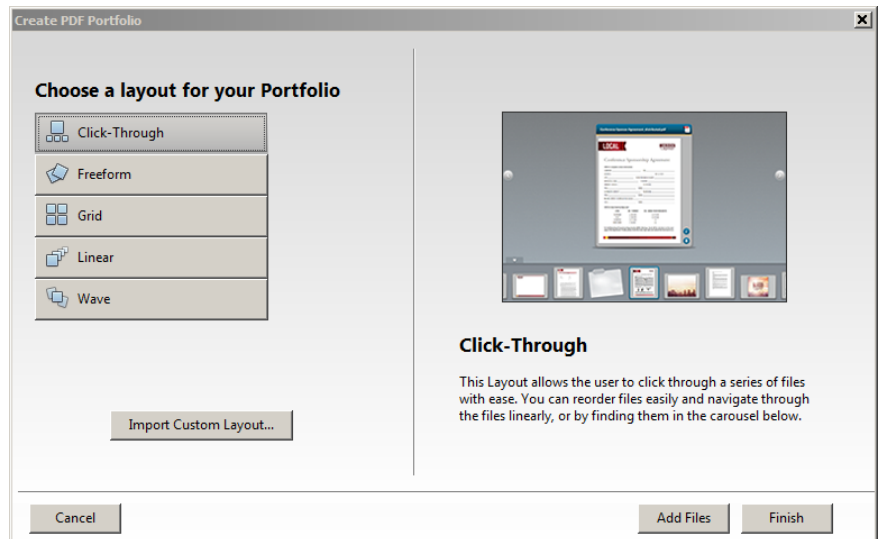https://helpx.adobe.com/flash-player.html

To create a Portfolio, open the Adobe Acrobat application. It doesn't matter what document you start in. From the pull down menu, select "File > Create > PDF Portfolio". This screen shot is using Adobe Acrobat Pro 11. The DC version may be slightly different.
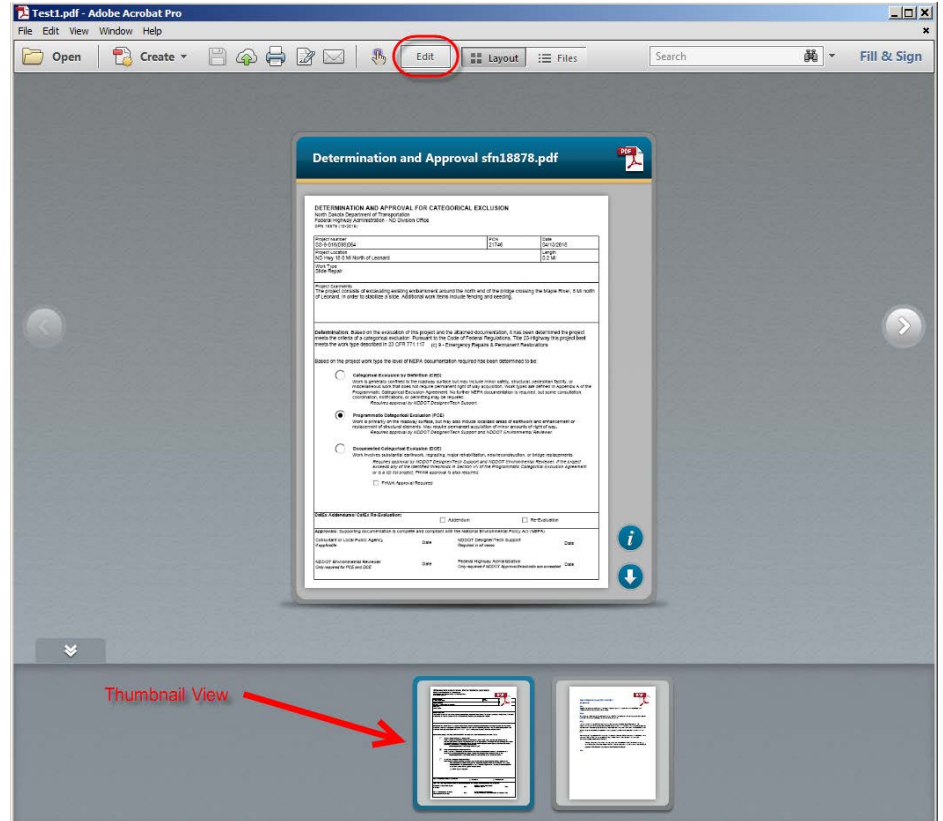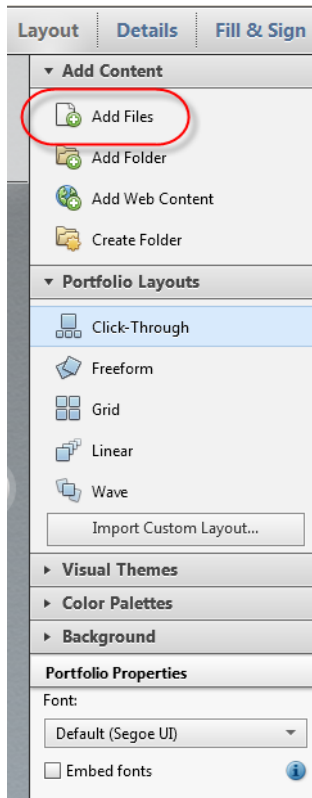
The "Create PDF Portfolio" dialog should open. There are options for the portfolio format. Always use the "**Click-Through**" layout. The portfolio format may be new to some viewers and the NDDOT wants to present a simple standard layout.

Use the Add Files button to select the individual pdf files. You can select multiple files at one time if desired, but is not required. You can also add additional files after the initial portfolio is created.

When files are added to a portfolio a thumbnail view of each document within the portfolio will be shown at the bottom of the screen in the "Click-Through" format.

You may need to click the "Edit" button in the tool bar to display the "Layout" tab with "Add Content" options. The "Add Files" tool will enable you to add additional files to the portfolio.

While in Edit mode, the thumbnail views shown at the bottom of the portfolio can be dragged forward or backward to change the view order within the portfolio. A pdf within the portfolio can be deleted by selecting the pdf or thumbnail and deleting it (delete key, Edit > Delete, or right click delete).

Be sure to "File > Save Portfolio" before exiting Adobe Acrobat.