

User's Guide to Creating PDFs for the Sony® Reader



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I. Introduction

PDF (Portable Document Format)

PDF (Portable Document Format) is a cross-platform, device-independent page description language and file format developed by Adobe Systems. Its primary use is to render, store, and transmit formatted pages, capturing the entire page structure of a document just as it would have been rendered by a Postscript printer.

Most common file formats can be converted to PDF using Adobe® Acrobat® Standard or Professional or other PDF rendering applications, some of which are available at no cost.

Many professional book, magazine, and other printers prefer to be supplied with PDFs for printing because it is a standardized format and because unless a PDF is deliberately edited, its contents can be considered safe from unintended alteration. Properly generated and handled, PDFs can basically be thought of as a faithful electronic representation of the print version of any document.

One of the key differences between a PDF and an image file format (like jpeg, gif, etc.) is that PDF preserves formatting elements such as fonts and graphics by embedding them into the file in a manner that can be managed via various settings.

PDF is an excellent means of displaying content from a variety of common consumer applications, including the Microsoft® Office suite of applications and their OpenOffice.org open source counterparts, on the Sony® Reader. The key to generating PDFs that will display clearly on the Reader is to size the PDF properly when you create it, and to set margins, font sizes, etc. within a range that is suited to the Reader's screen size and resolution. This instructional document is intended to provide all the information necessary to create PDFs that are ready to be viewed in the Sony Reader from a variety of common applications.

PDF Creation Software

On a computer running the Microsoft Windows® operating system, you will need to have PDF creation software installed in order to generate PDFs from within the common desktop applications covered in this instructional document. Two good options are Adobe Acrobat (either Acrobat Standard or Acrobat Professional) and PDF Creator.

Adobe Acrobat Standard and Professional, unlike the free Adobe Reader, are used to create, edit, and add features to PDFs. (Adobe Reader can only be used to view them.) The Professional version of the Adobe Acrobat software includes a number of features and capabilities of interest to professional users, but Acrobat Standard is often sufficient for creating PDFs for the Sony Reader. These applications are available for purchase at <http://www.adobe.com/products/acrobat/>.

PDF Creator is an open source alternative to Adobe Acrobat Standard or Professional for generating PDFs from documents created in Windows applications. It has been released under the terms of the GNU General Public License and is available for download at <http://sourceforge.net/projects/pdfcreator/>.

Once you have successfully installed one of these applications, you will be able to create PDFs using the print menu of your applications.

The Sony® Reader screen dimensions and key specifications

Sony Reader screen size	
Page size:	3.57" width x 4.82" height (90.6 mm x 122.4 mm)
Screen resolution:	166 dots per inch (DPI)
Pixel count:	800 x 600 (SVGA)
Pixel size:	rectangular, 151 x 153 micron
Grayscale Capability:	2-bit (4 gray levels)

Font recommendations for the Sony® Reader

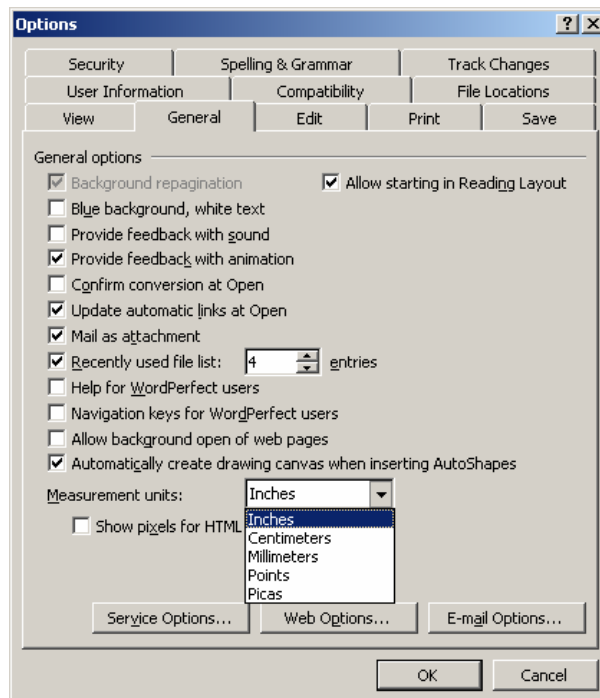
A range of fonts and font sizes will display clearly in PDFs on the Sony Reader. As a general starting point, we recommend using Arial and Times Roman as base fonts at sizes of 7 points. Text is legible at 6 points, though at this size it can lose some clarity. Large fonts will tend to use up screen space rather rapidly given the maximum document dimensions.

II. Creating PDFs from Word Processing Documents

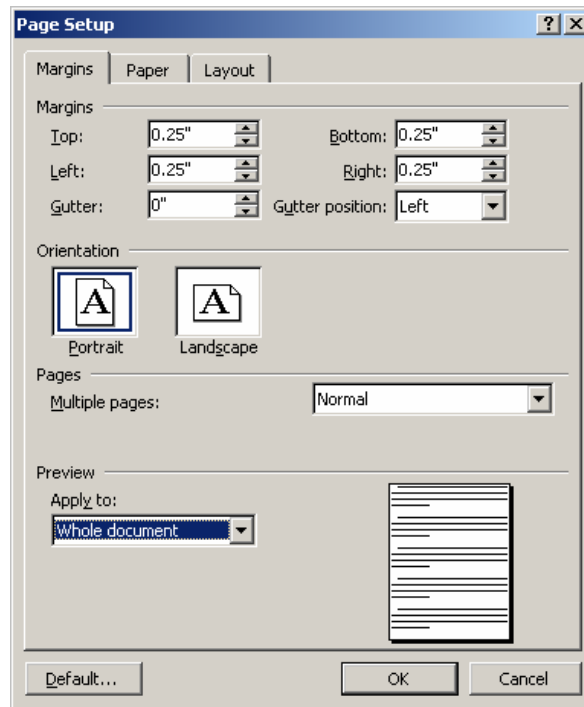
Following these step-by-step instructions will enable you use word processing software to produce PDFs that are optimized for display on the Sony® Reader. The first part of the overall process is to create a word processing document with the right dimensions and layout. The second part of the process is to generate a PDF with appropriate settings. Instructions for further enhancing your PDF with links are available in Section V (“Doing More with Adobe® Acrobat”).

Microsoft® Word

1. To set document size and margin settings, select File → Page Setup.
2. In the Margins tab, check that all units are calculated in terms of inches. (Throughout this instructional document, all measurements are displayed in inches.)
3. If you need to change measurement units to inches, click the “Cancel” button, then select Tools → Options.
4. In the General tab, change “Measurement units” to “inches.”

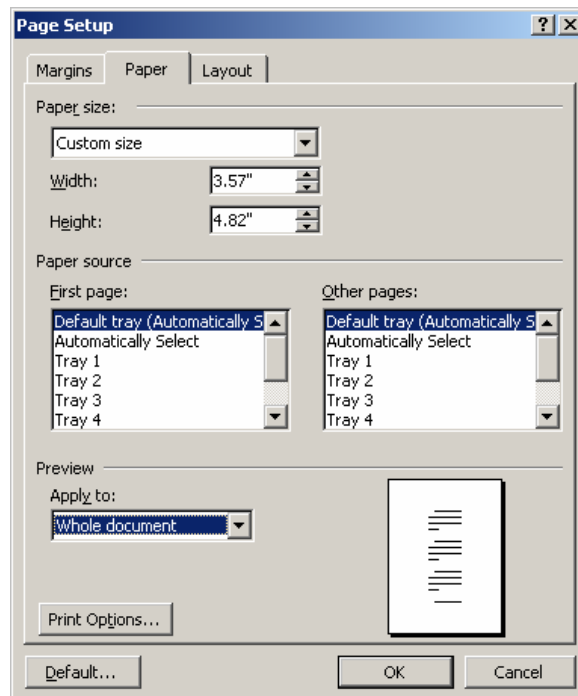


5. Click “OK,” then navigate once again to File → Page Setup.
6. In the Margins tab, set Left, Right, Top and Bottom margins at 0.25”.



7. In the Paper tab, set width to 3.57" and height at 4.82".

Under "Preview" section, select "Apply to" → "Whole document."



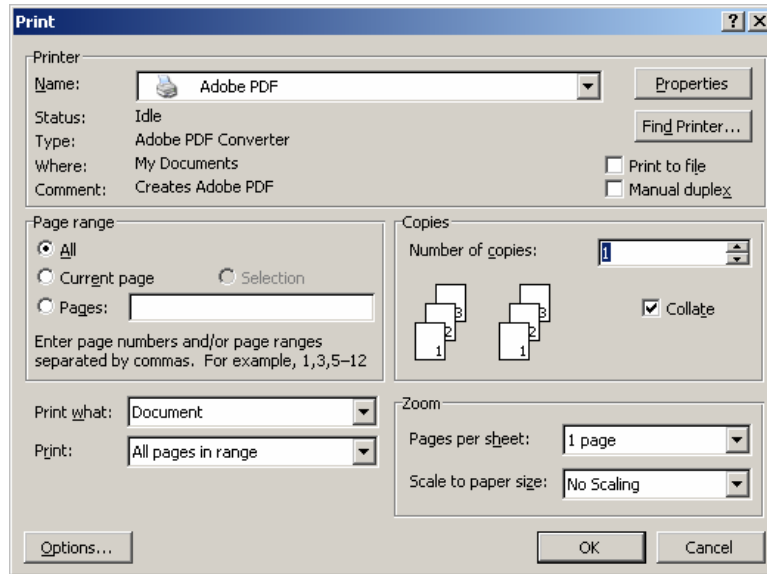
Press "OK."

Create PDF using Adobe PDF or PDF Creator printer.

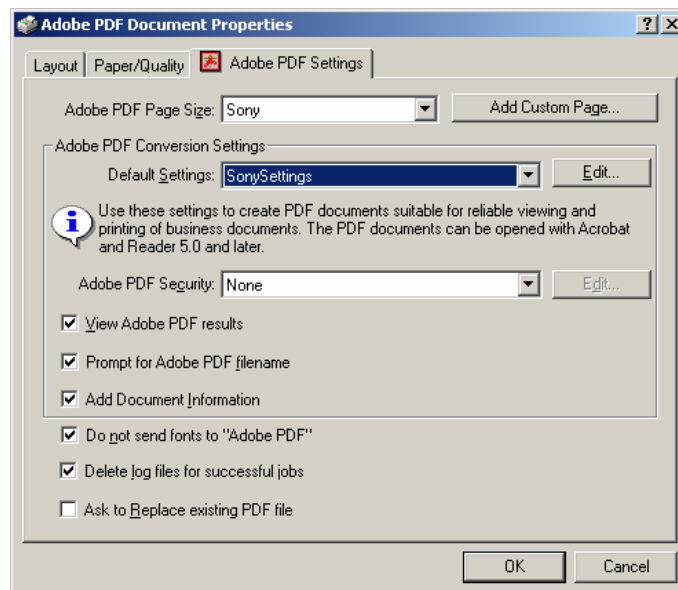
If you have purchased and installed Adobe® Acrobat® Standard or Professional, or if you have installed PDF Creator, you can create PDFs using Microsoft® Word's Print menu.

Adobe Acrobat Standard or Professional

1. Select File → Print.
2. For Printer, select "Adobe PDF."



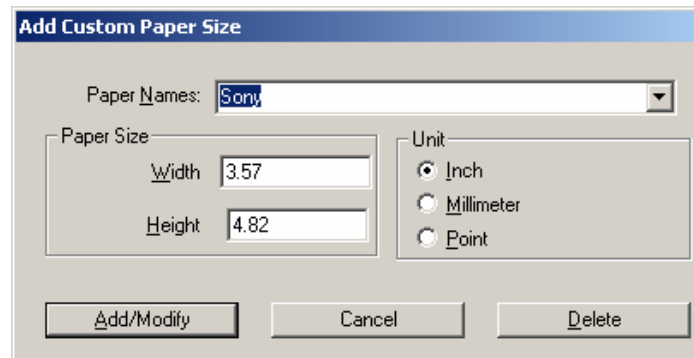
3. Click "Properties" in the "Print" dialog box. (This may appear as "Preferences" instead of "Properties," depending on the version of Windows you are using.) Select the "Adobe PDF Settings" tab.



4. Click the "Add Custom Page..." button.

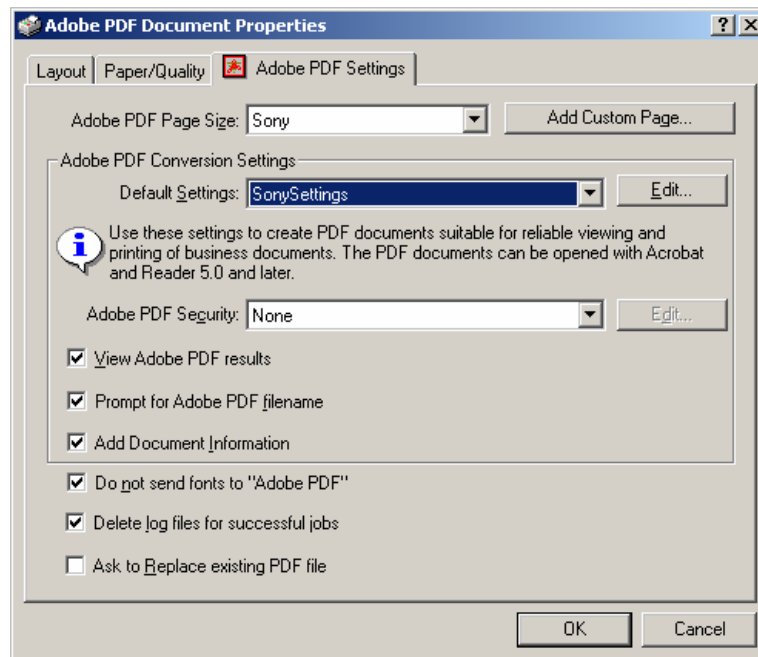
Name the custom paper size "Sony" (or whatever name you'd prefer to use) in the "Paper Names" field.

Set Width at 3.57 and Height at 4.82. Set the "Unit" as "Inch." Then click the "Add/Modify" button. (This will bring you back to the "Adobe PDF Settings" tab.)



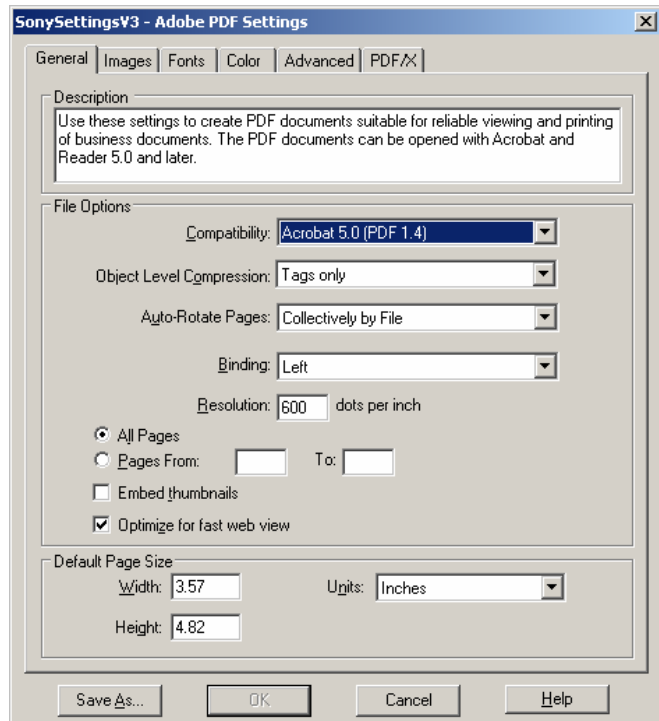
In the future, your new custom size will be available for you to select in the "Adobe PDF Settings" tab—no need to repeat the "Add Custom Page" routine.

5. Select the "Edit" button next to the "Default Settings" field.

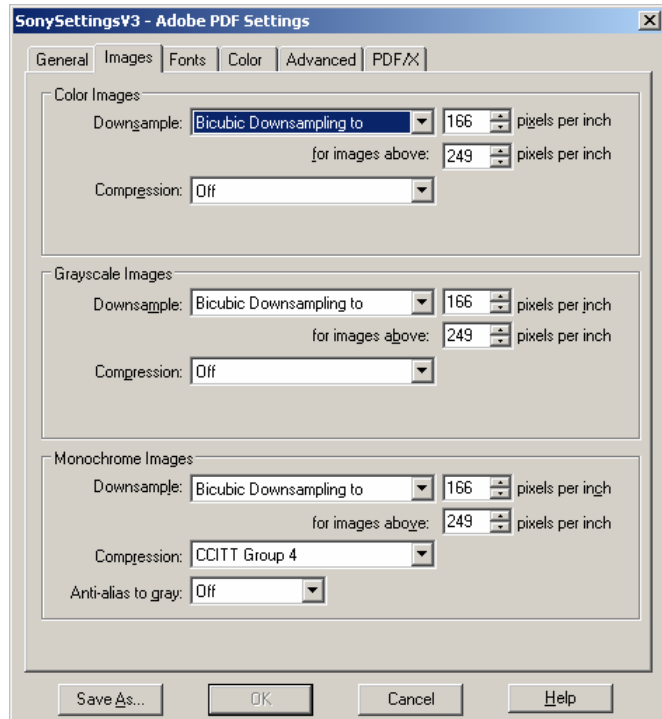


6. Select the settings shown in the following figures:

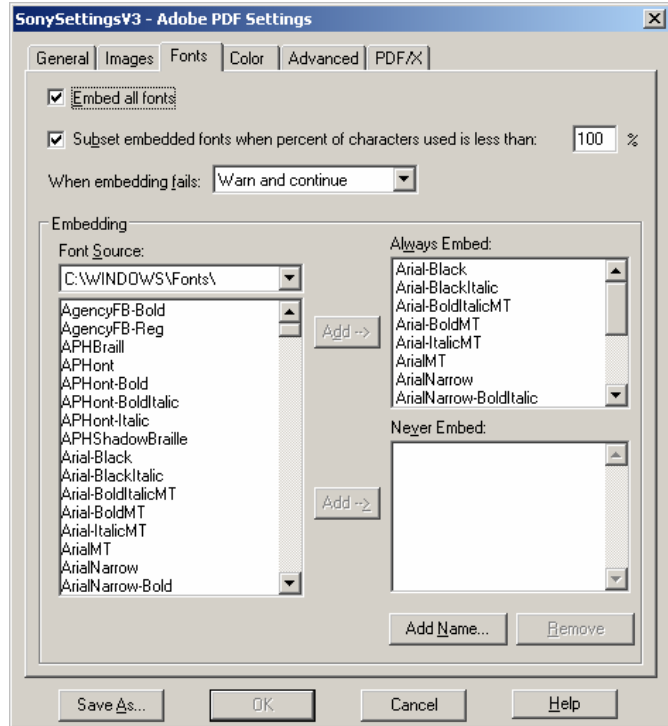
General tab



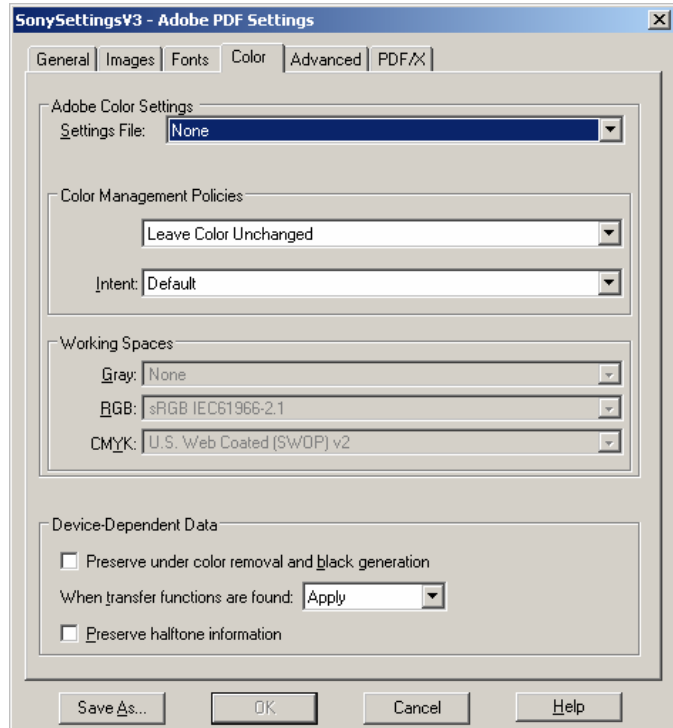
Images tab



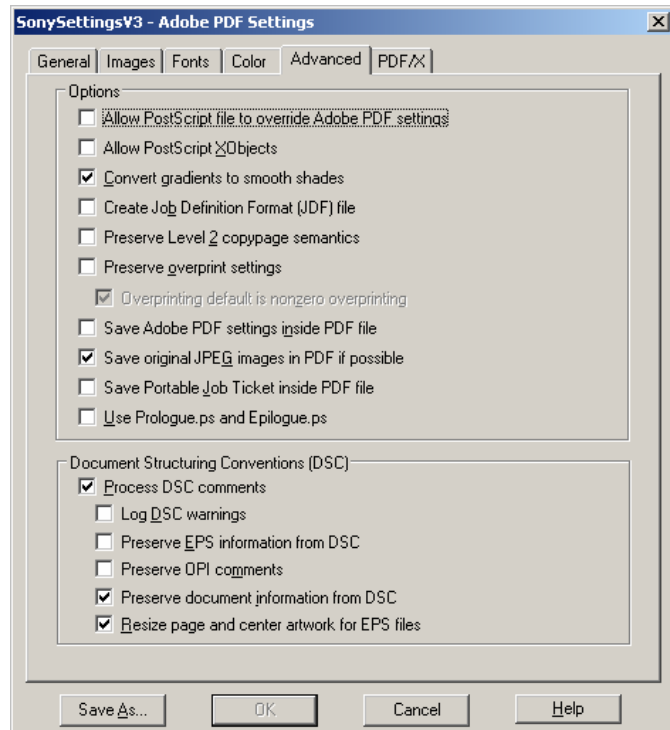
Fonts tab



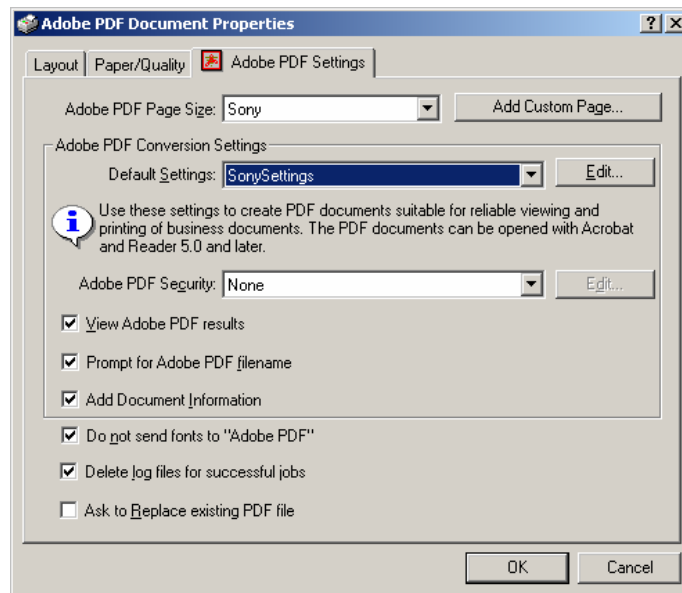
Colors tab



Advanced tab

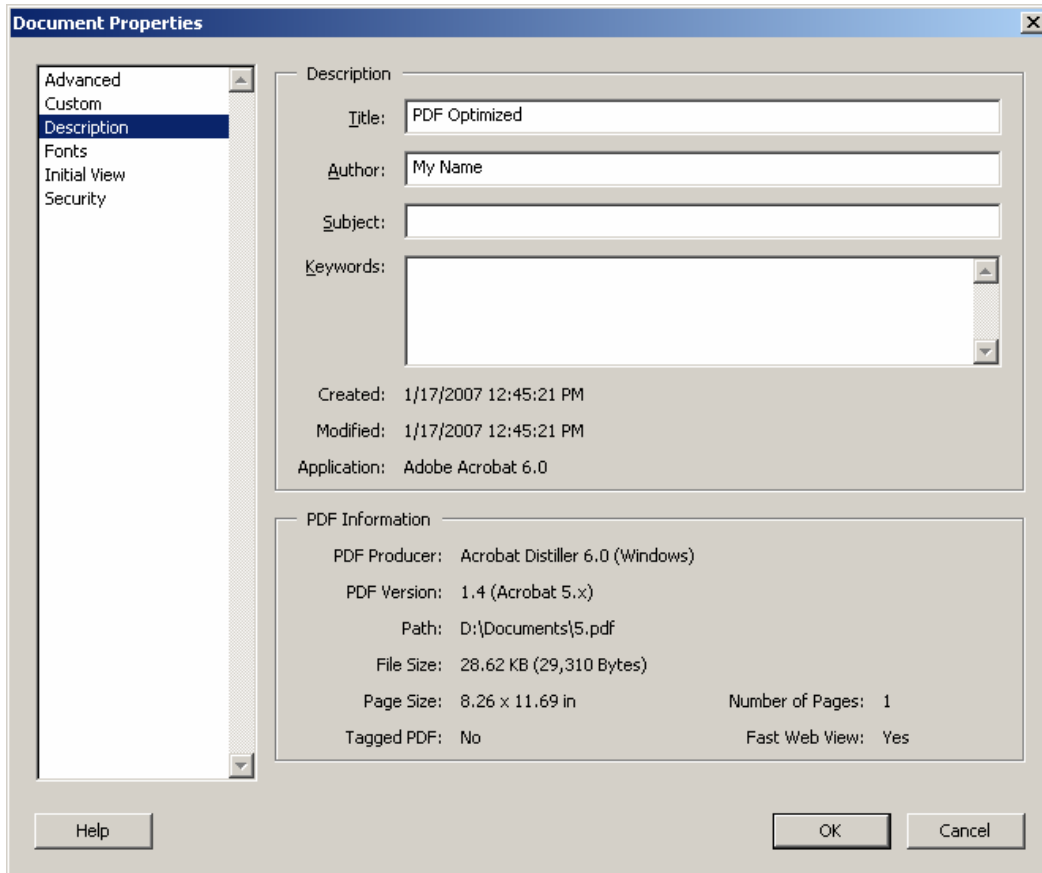


7. You can save the Adobe PDF settings that you just created as a preset that will be available in all applications that can print. Click the "Save As" button and provide a name for the settings preset. Next time you want to create a PDF optimized for the Sony Reader, just select the Adobe PDF printer, click "Properties" or "Preferences," and select your preset in the "Default Settings" list within the "Adobe PDF Settings" tab (see #3 above).
8. Press the "OK" button and provide a filename and location for your PDF file to be written to.



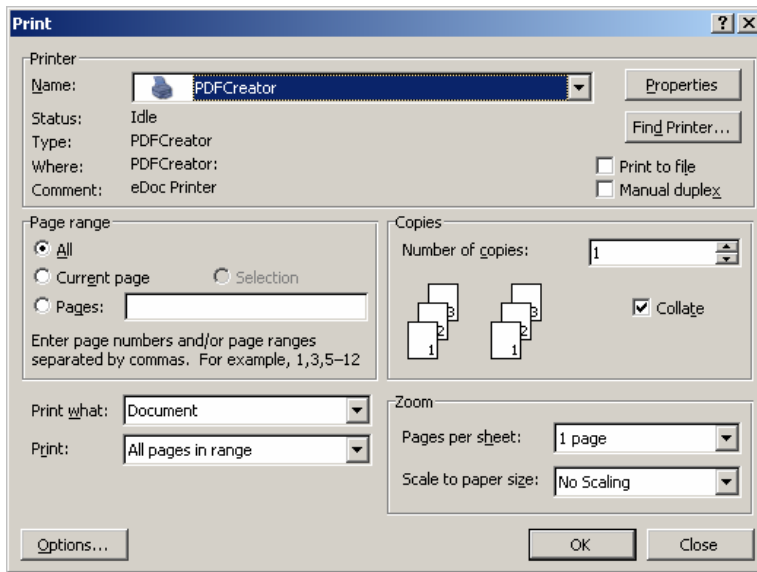
9. To set the filename and author that will appear in the Sony® Reader menu, open your PDF in Adobe® Acrobat® Standard or Professional.

From the File menu, select “Document Properties.” Type the title and author in the corresponding fields.



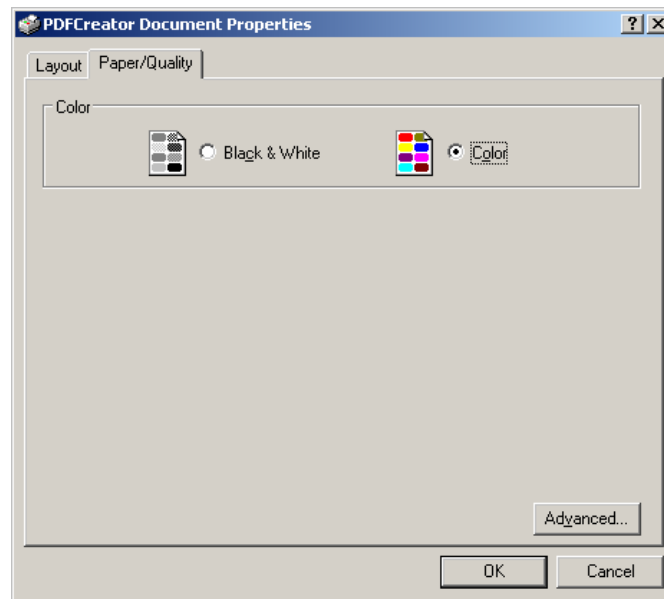
PDF Creator

1. Optimize document size and margin settings in Microsoft® Word—see p. 5, step 1.
2. Select File → Print.
3. For Printer, select “PDFCreator.”

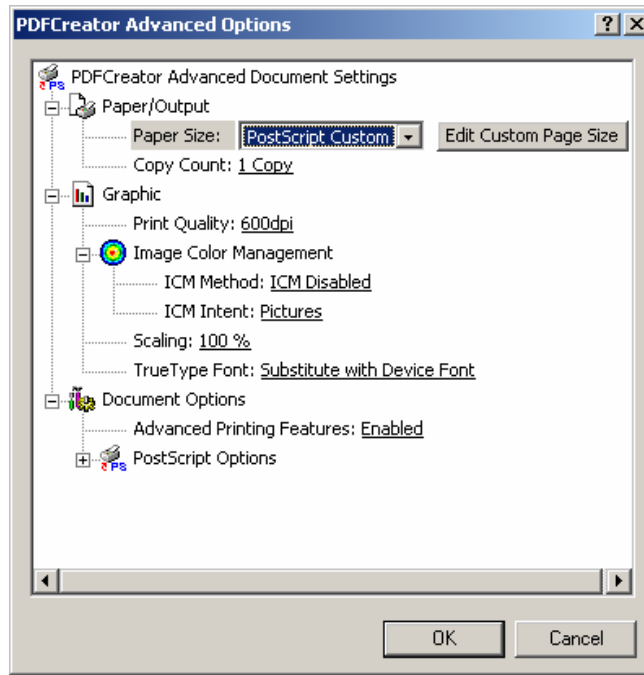


4. Click "Properties" in the "Print" dialog box.

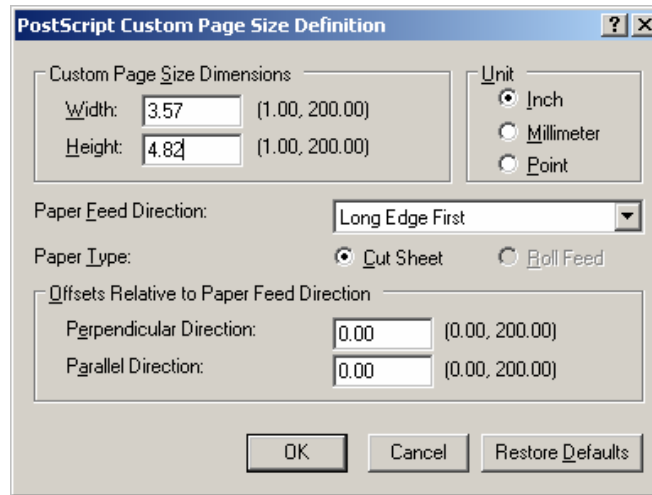
Select the "Paper/Quality" tab. With the "Color" option selected, click the "Advanced" tab.



5. Select "PostScript Custom Page."

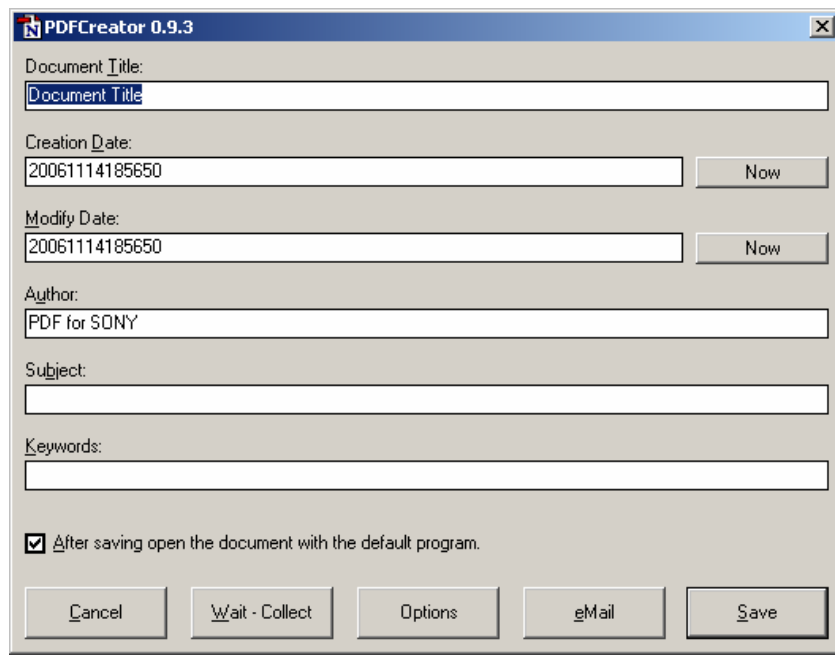


6. Set Custom Page Size Dimensions at 3.57 Width by 4.82 Height, with "Inch" as selected Unit.



Press the "OK" button.

7. In the PDF Creator dialog box, type the title and author that you want to appear in the Sony® Reader file menu.



8. Press the "Save" button and provide a filename and location for your PDF file to be written to.

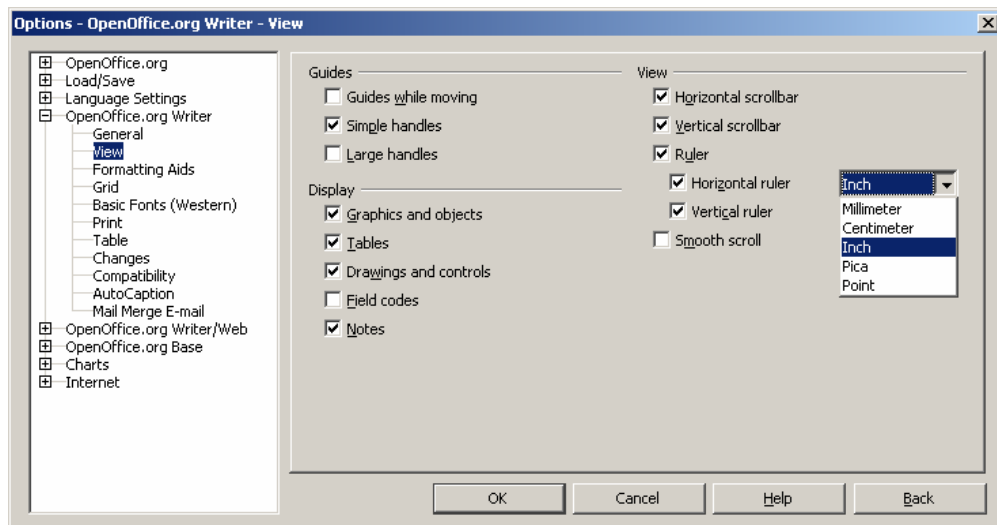
Note on links and bookmarks in your PDFs

See Section V ("Doing More with Adobe® Acrobat") for instructions on using Adobe® Acrobat® Standard or Professional to create links within your PDF document that can be navigated on the Sony® Reader. Please note, however, that bookmarks created in Microsoft® Word will not appear in the Reader.

OpenOffice.org Writer

OpenOffice.org is a suite of free, open-source, cross-platform applications intended to provide an alternative to Microsoft® Office.

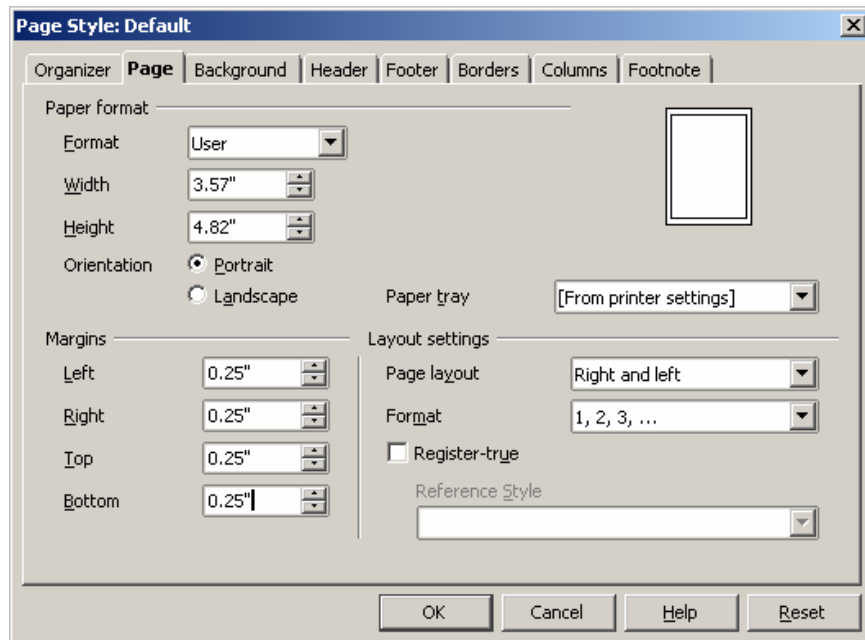
1. To set page settings, select Format → Page.
2. In the "Page" tab, check that units are displayed in inches. (Throughout this instructional document, all measurements are displayed in inches.)
3. If you need to change measurement units to inches, click the "Cancel" button, then select Tools → Options.
4. In the left pane, click the "+" next to the words "OpenOffice.org Writer," then click "OK" to expand the selection. Click View, then check the "Ruler" option. Select "Inch" from the drop-down menus for Horizontal ruler and Vertical ruler.



5. Click "OK," then return to Format → Page.

Under "Paper Format," set Width to 3.57" and Height to 4.82".

Under "Margins," set all margins to 0.25".



Create PDF using Adobe PDF or PDF Creator printer.

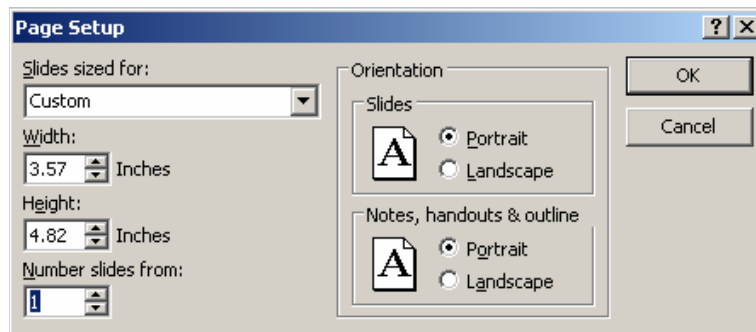
1. Select File → Print.
2. For Printer, select either "Adobe PDF" or "PDFCreator."
3. Follow instructions provided for creating PDFs in Microsoft® Word using either of these PDF rendering applications (see above).

III. Creating PDFs from Presentations

Following these step-by-step instructions will enable you use presentation software to produce PDFs that are optimized for display on the Sony® Reader. The first part of the overall process is to create a presentation with the right dimensions and layout. The second part of the process is to generate a PDF with appropriate settings. Instructions for further enhancing your PDF with links are available in Section V (“Doing More with Adobe® Acrobat”).

Microsoft® PowerPoint® presentation program

1. To set document size and margin settings, select File → Page Setup.
2. In the Page Setup dialog box, set Width at 3.57 inches and Height at 4.82 inches. (Inches is the default measurement unit in PowerPoint.)



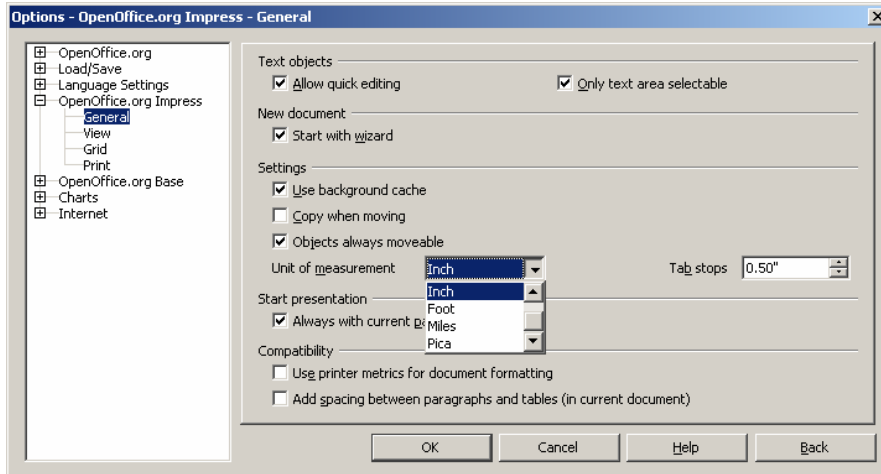
PowerPoint does not support margin setup.

Create PDF using Adobe PDF printer or PDF Creator.

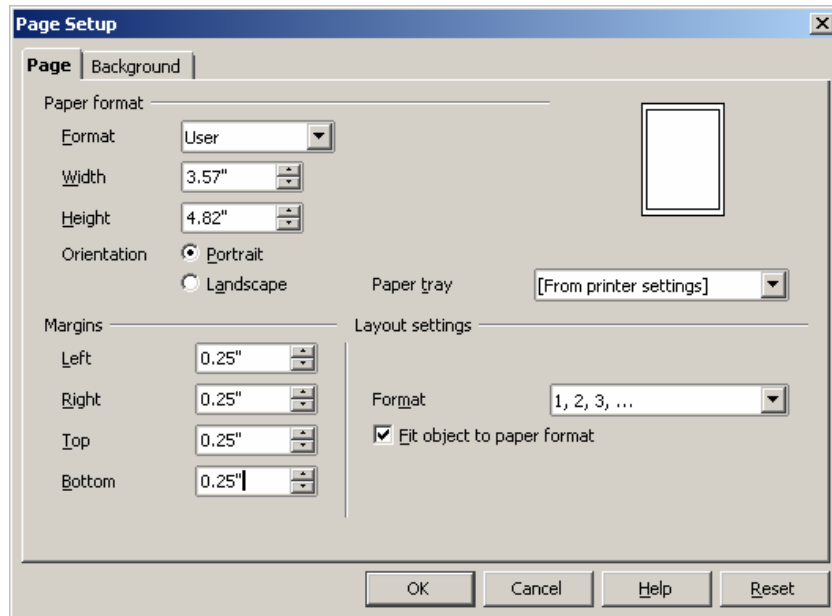
1. Select File → Print.
2. For Printer, select either “Adobe PDF” or “PDFCreator.”
3. Follow instructions provided for creating PDFs in Microsoft® Word using either of these PDF rendering applications (see above).

OpenOffice.org Impress

1. To set document size and margin settings, select Format → Page Setup.
2. In the “Page” tab, check that units are displayed in inches. (Throughout this instructional document, all measurements are displayed in inches.)
3. If you need to change measurement units to inches, click the “Cancel” button, then select Tools → Options.
4. In the left pane, click the “+” next to the words “OpenOffice.org Impress,” then click “OK” to expand the selection. Click General, then select “Inch” from the drop-down list for “Unit of measurement.”



5. Click "OK" and return to Format → Page. Under "Paper Format," set Width to 3.57 inches and Height to 4.82 inches. Under "Margins," set all margins to 0.25 inches. Then click "OK."



Create PDF using Adobe PDF printer or PDF Creator.

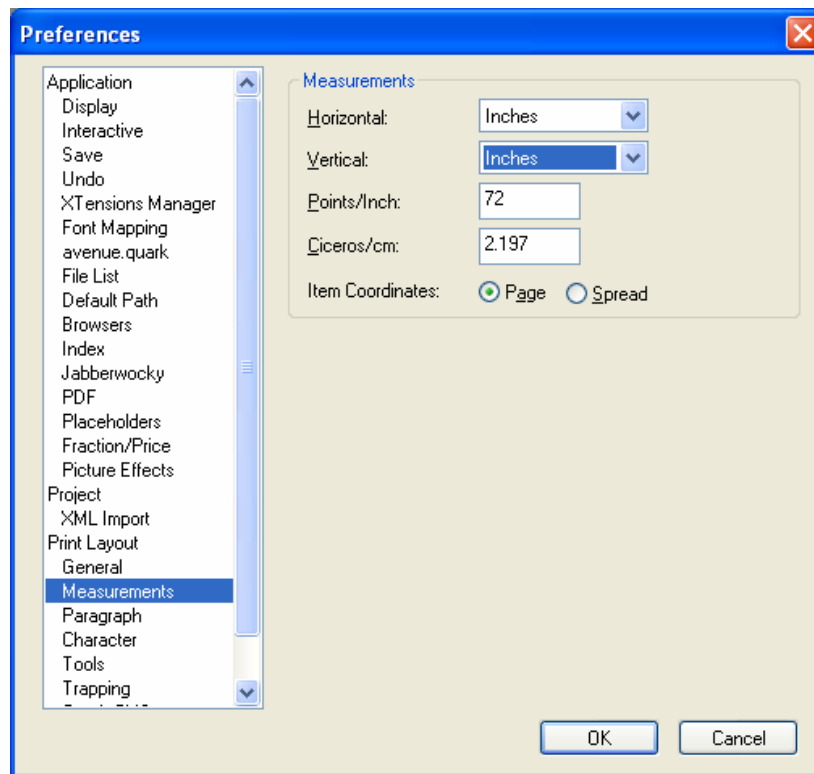
1. Select File → Print.
2. For Printer, select either "Adobe PDF" or "PDFCreator."
3. Follow instructions provided for creating PDFs in Microsoft Word® using either of these PDF rendering applications (see above).

IV. Creating PDFs from Professional Layout Applications

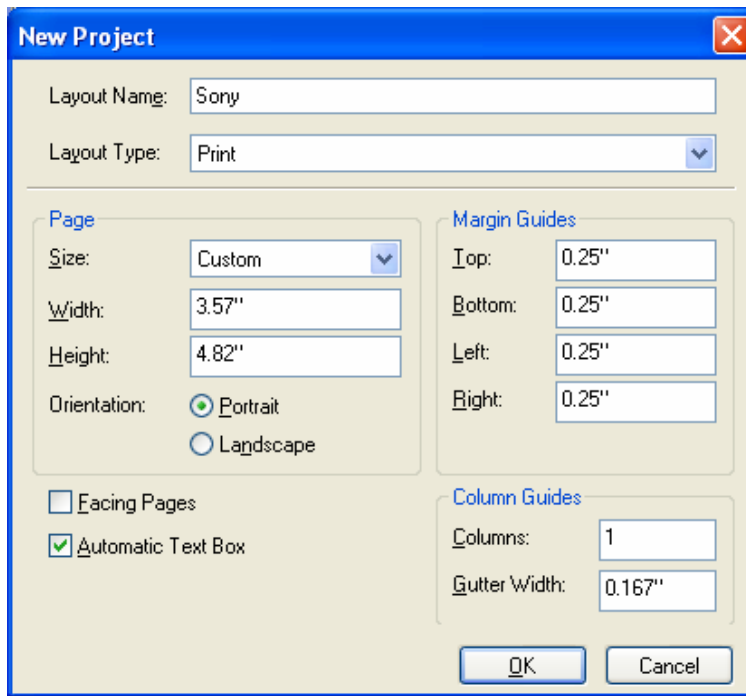
Following these step-by-step instructions will enable you use professional layout applications to produce PDFs that are optimized for display on the Sony® Reader. The first part of the overall process is to create a document with the right dimensions and layout. The second part of the process is to ensure that fonts and images used in your document will all be embedded properly before you output your PDF. The final part of the process is to generate a PDF with appropriate settings. Instructions for further enhancing your PDF with links are available in Section V (“Doing More with Adobe® Acrobat”).

QuarkXPress® software

1. First, ensure that the measurement fields that you will be seeing in all menus are in inches by navigating to Edit → Preferences, selecting “Measurements,” and selecting “Inches.”



2. Open a new document by selecting File → New → Project.
3. In the New Project dialog box, create a layout named “Sony” and provide settings for page dimensions and margins as shown below. (Automatic text box is optional.)



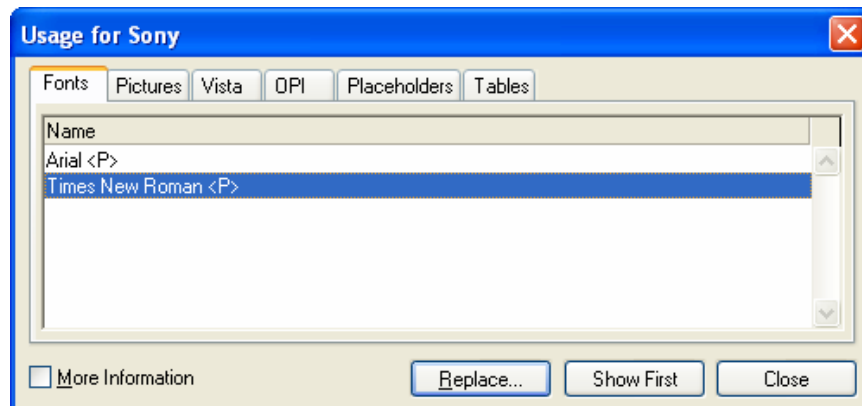
- Now you are ready to format your document within the optimized layout that you have generated.

As a general styling recommendation, fonts appear clearly on the Reader at a minimum size of 6 or 7 points.

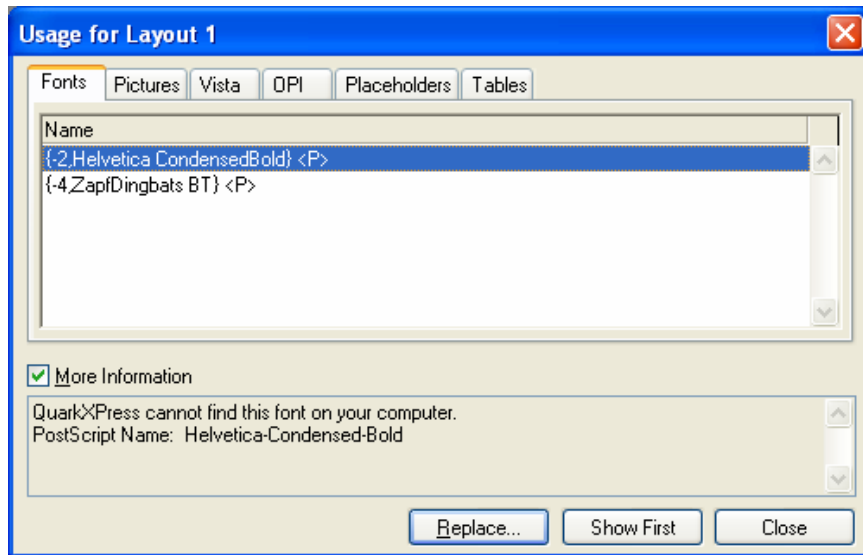
- Before opening the Print menu to output your PDF, it is important to ensure that QuarkXPress® program can locate all fonts that you have used in your document on your computer. Any font that QuarkXPress cannot find will not be properly embedded in your PDF.

To check your font usage, go to the Utilities menu, select Usage, and then select the Fonts tab.

If all fonts have been properly embedded, the fonts will simply be listed by name, as in the following screenshot.

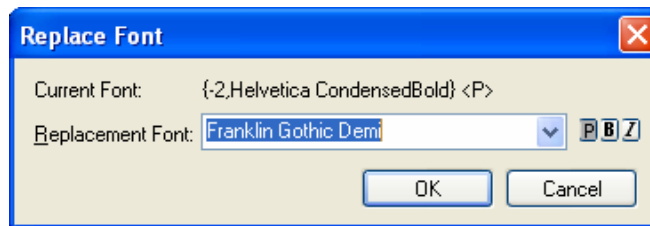


However, if you have used fonts in your document that QuarkXPress program cannot find, each of these fonts will be listed in the Usage menu inside curly brackets, as shown below.



This problem can be solved in two ways.

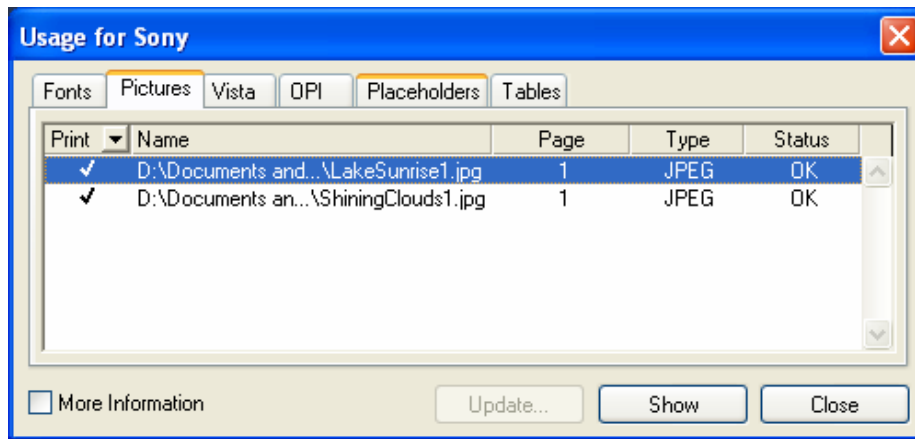
- (a) You can find or purchase the missing fonts and place them in the fonts folder on your computer. A common location for the fonts folder on Windows® systems is C:\WINDOWS\Fonts.
- (b) You can use the Replace button in QuarkXPress to substitute other fonts that are available to the application.



6. It is also important to ensure that all images and graphics that you have used in your document are properly linked. This is because if you place an image inside your QuarkXPress document, what you see inside the QuarkXPress document itself is a low-resolution preview of the original image—the original is still being stored separately on your hard drive. If you then move the original image file to another location on your hard drive before creating your PDF, you need to tell QuarkXPress program the new location. Otherwise, the PDF that you create will have the low resolution preview embedded within it rather than the high resolution original, as you intended.

To check your image usage, go to the Utilities menu, select Usage, and then select the Pictures tab.

If an images has been properly embedded, it will be listed with status "OK."



If the image status is "Missing," click the "Update" button and navigate to the location of the original image file.

Once all images are properly linked, press the "Done" button.

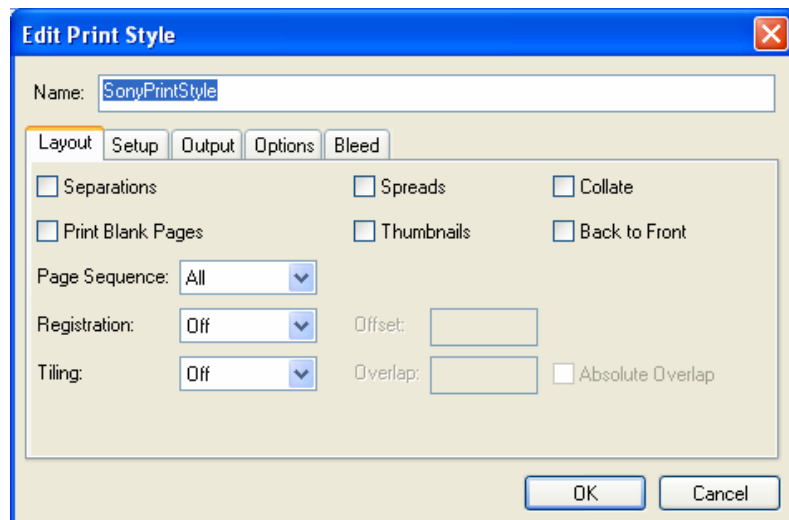
- When you are ready to output your PDF, the first step is to define a Print Style appropriate for the Sony® Reader. Once you have created this Print Style, it will remain available for future use.

To define a Print Style, go to Edit → Print Styles.

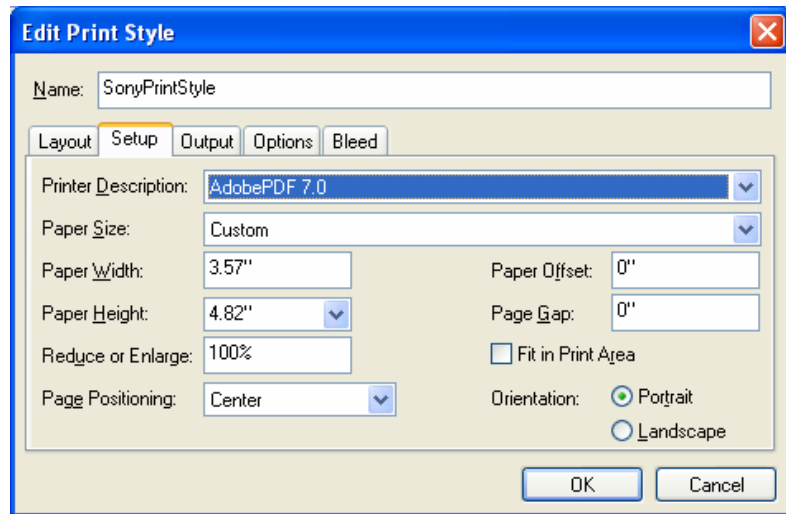
In the dialog, select "New" and provide a name for your Sony® Reader-optimized print style (for example, "SonyPrintStyle").

Settings for the print style are as follows:

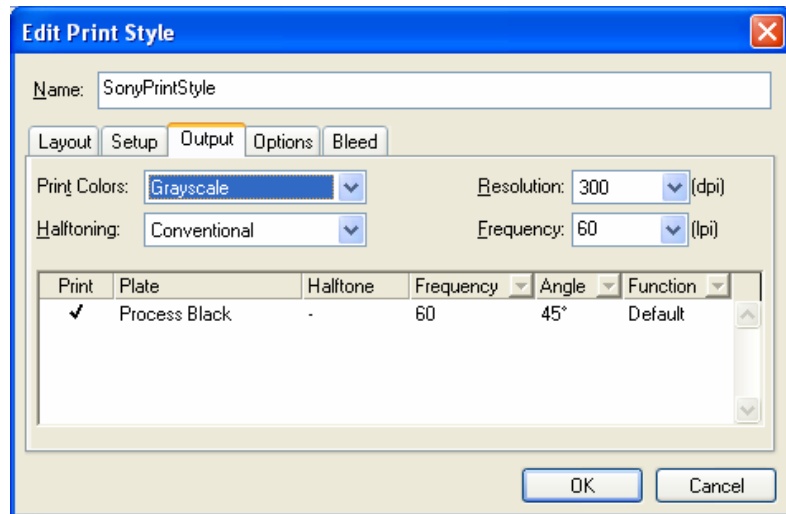
Layout



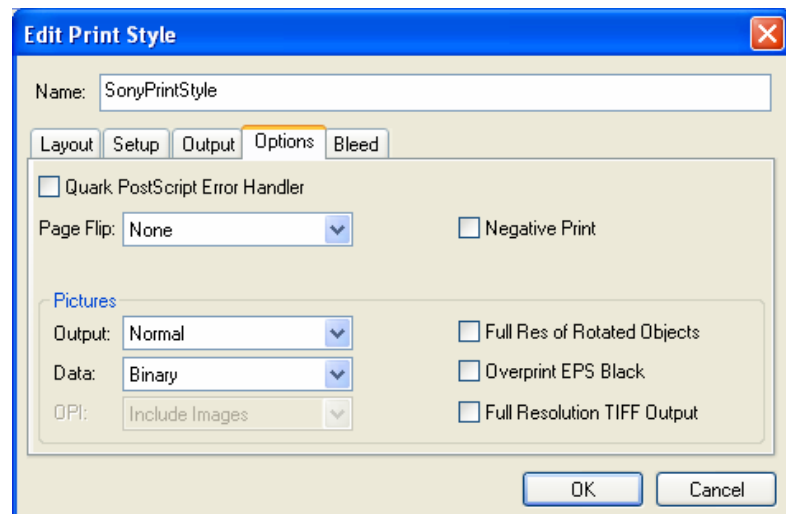
Setup



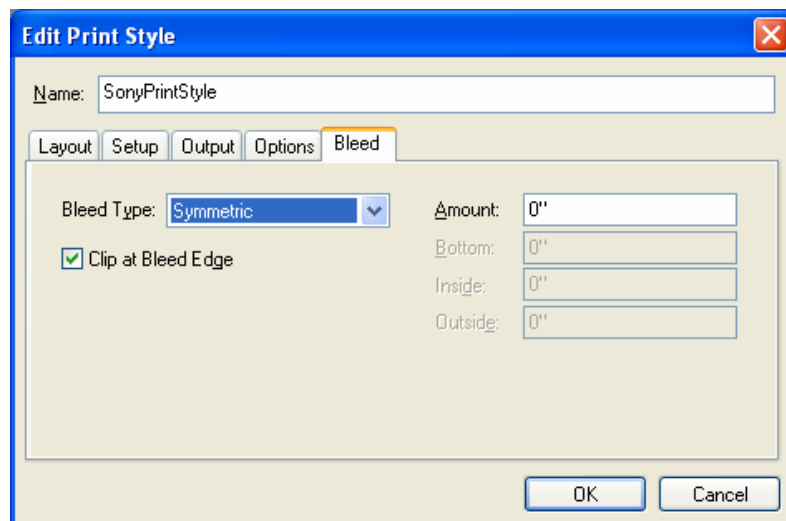
Output



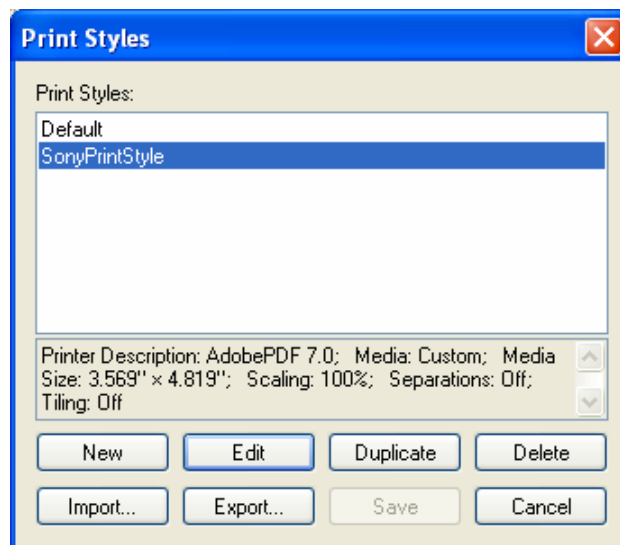
Options



Bleed



Click "OK," and in the next dialog, click "Save." You will now have your new Print Style saved in the Print Style menu for future use.



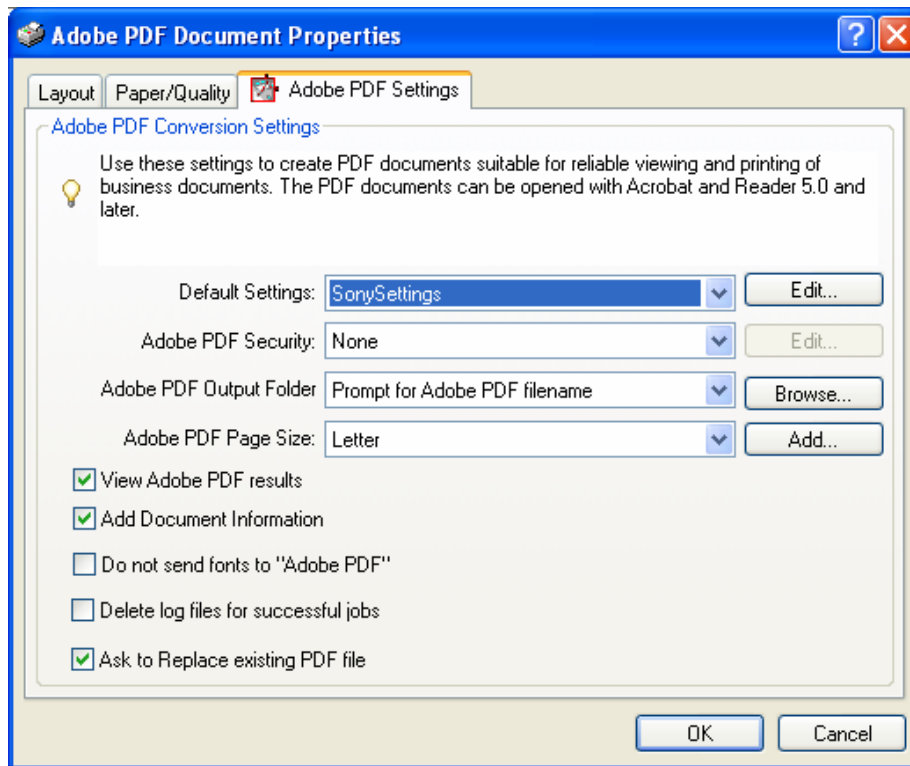
8. To create your PDF, select File → Print. This will launch the print dialog.

From the Printer menu at the top of the dialog, select "Adobe PDF."

9. Click the "Properties" button to the right of the "Printer" menu in order to select the proper PDF settings.

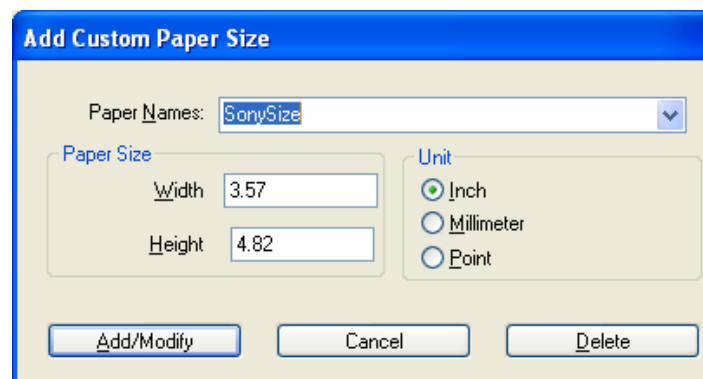
In the "Default settings" menu, select "Sony Settings." (See Section V ["Doing More with Adobe® Acrobat"] for instructions on creating or installing this Sony-optimized PDF preset.)

In the "Adobe PDF Settings" tab, ensure that "Do not send fonts to 'Adobe PDF'" is not checked.

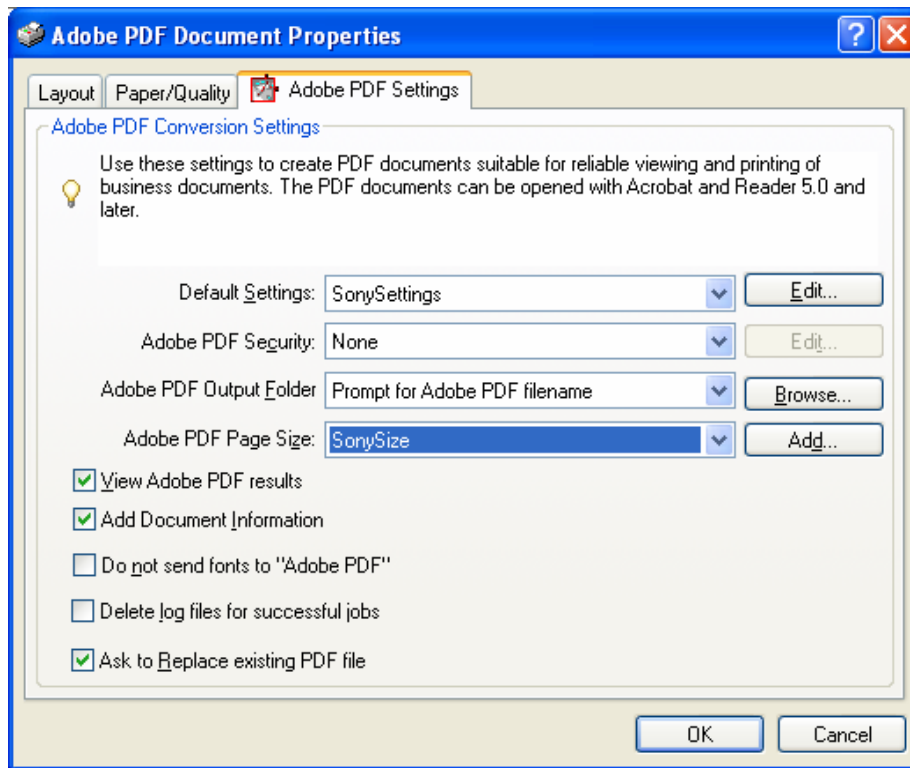


10. From the same "Adobe PDF Settings" tab, click the "Add" button next to the "Adobe PDF Page Size" menu.

Change the Width and Height fields to the values shown below. Provide a new "Paper Name" (for example, "SonySize"), and then click the "Add/Modify" button.



11. You will be returned to the "Adobe PDF Document Properties." Make sure to select your new Paper Name in the "Adobe PDF Page Size" field.

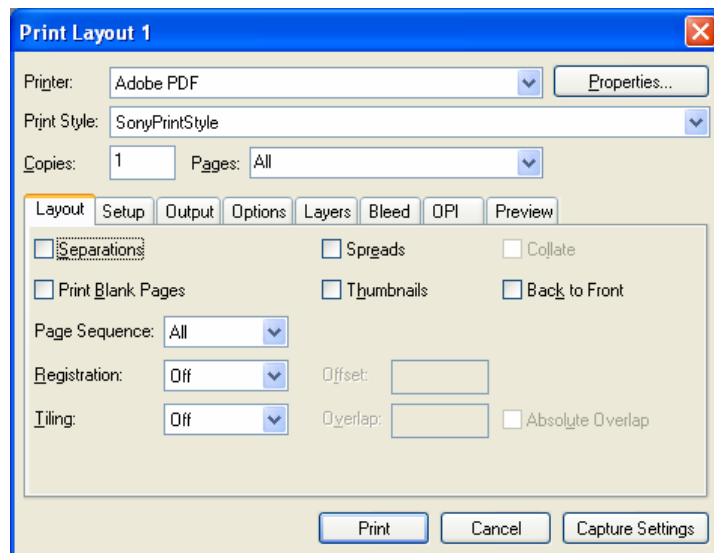


12. Press “OK,” and you will return to the Print menu.

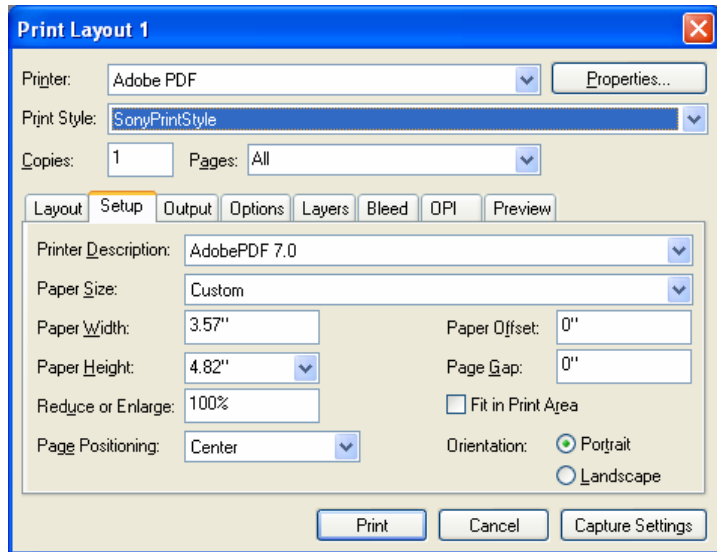
From the Print Style menu, be sure to select the Sony® Reader-optimized print style that you created in step #7 above (for example, “SonyPrintStyle”).

This print style will generate most of the settings in the various tabs depicted below. The key exception to this is the “OPI” tab, so please be sure to follow instructions for that tab below.

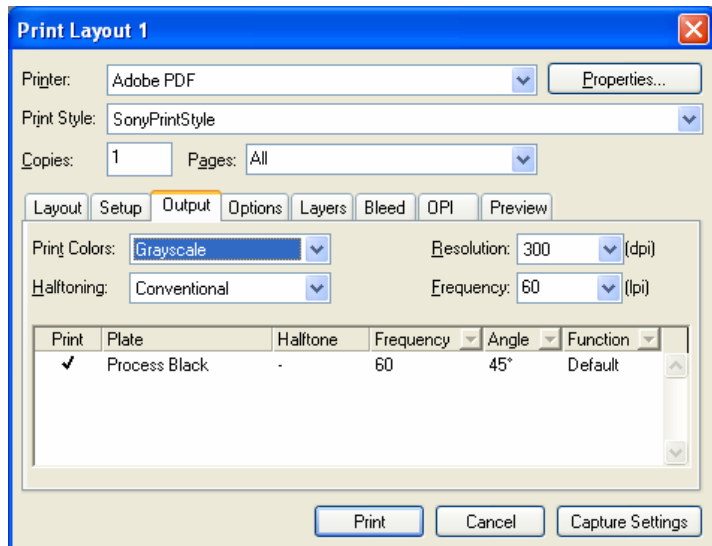
Layout



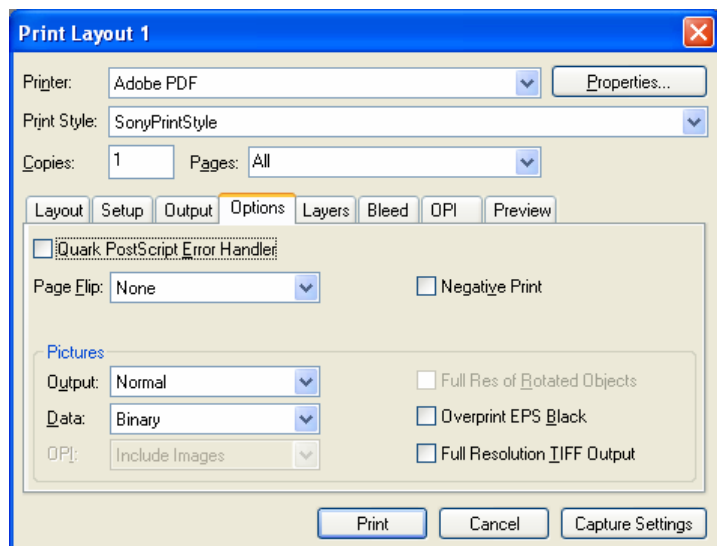
Setup



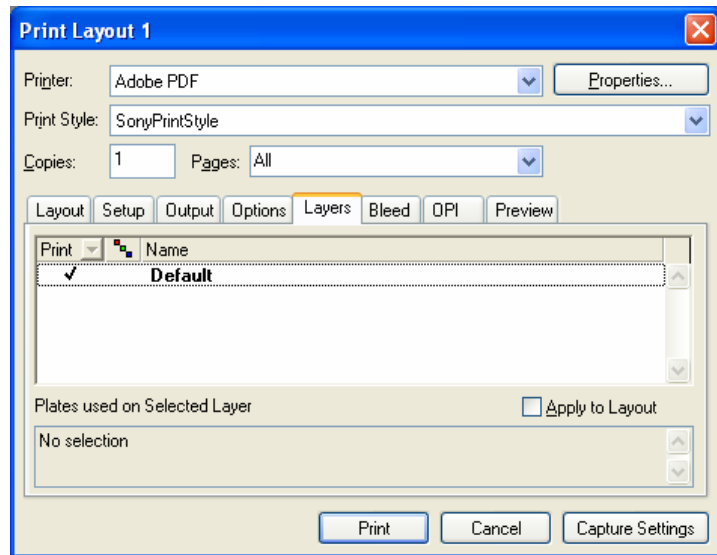
Output



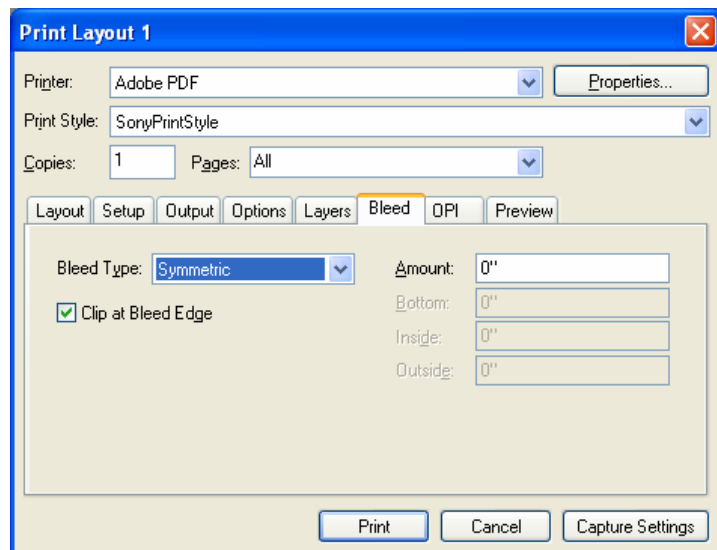
Options



Layers

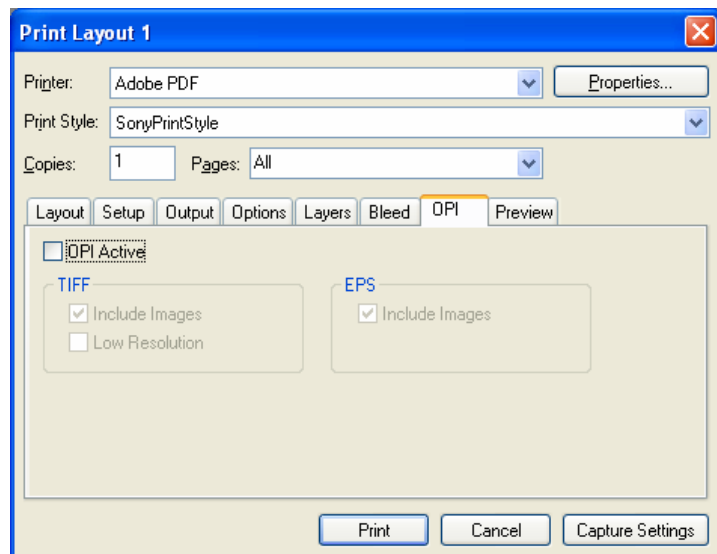


Bleed



OPI

Ensure that "OPI Active" is unchecked and that the rest of the settings are grayed out.

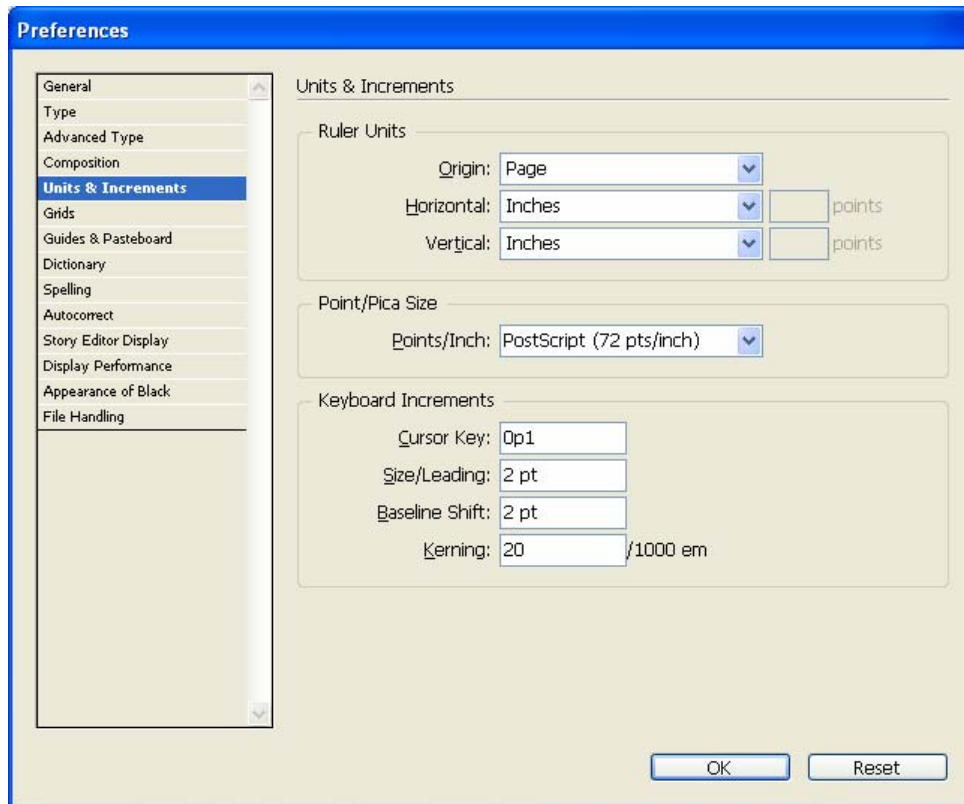


13. Click the "Print" button to generate your Sony® Reader-optimized PDF.

Adobe® InDesign

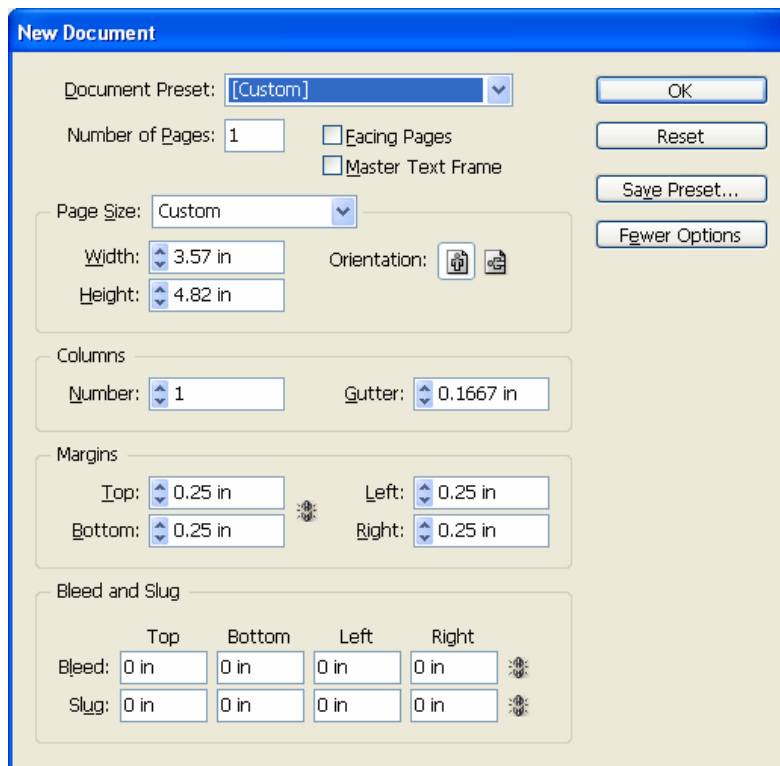
1. Navigate to Edit → Preferences → Units & Increments.

Set origin to page and ensure that units are in inches.



2. Open a new document by selecting File → New → Document.

Apply settings shown in the image below. Click the “More Options” button if the bleed settings are not visible.

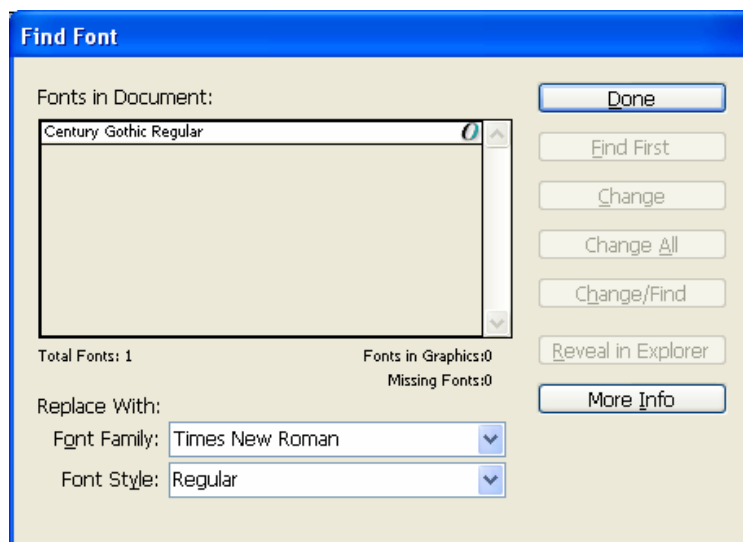


3. Click the "Save Preset" button and name your preset "Sony Preset."
4. Now you are ready to develop and format your document.

As a general styling recommendation, fonts appear clearly on the Reader at a minimum size of 6 or 7 points.

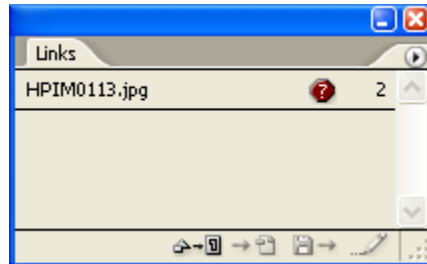
5. Before generating a PDF, check font usage by going to Type → Find Font.

Any fonts that are identified as missing should be replaced using the "Replace with" menu or moved into the fonts folder on your Windows® PC.



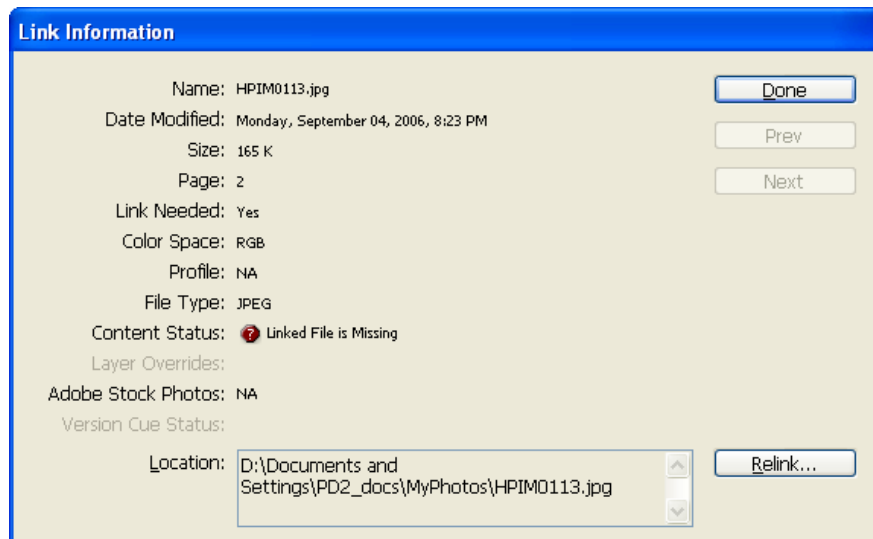
- Review the “Links” palette to check that all images used in your document are properly linked to your InDesign file. (If the “Links” palette is not visible, select “Links” in the “Window” menu.)

A question mark icon beside the image filename means that the image is not properly linked. It has most likely been moved at some point since it was first imported into your InDesign document, and the link has not yet been updated.



To update a link, double-click the image name in the Links palette to launch the “Link Information” dialog.

Click the “Relink” button and navigate to the new location of the image in order to relink it. When you return to the “Links” palette, the question mark icon will be gone.

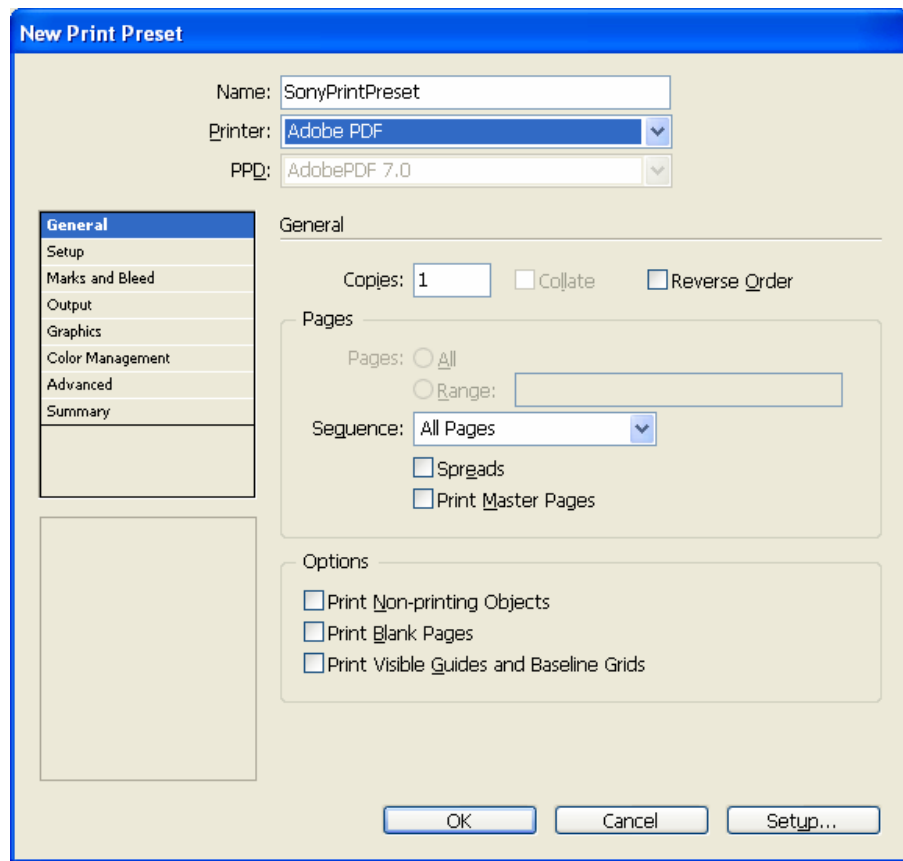


- Before outputting your PDF file, go to File → Print Presets → Define to create a reusable print preset.

Click the “New” button.

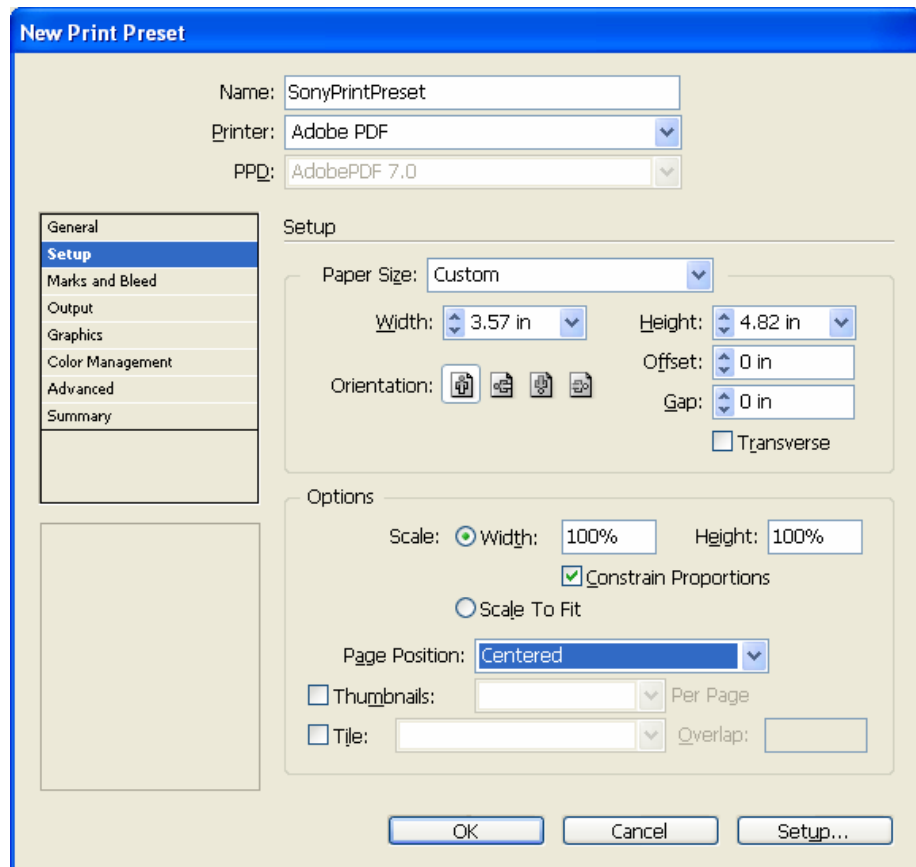
- Name the New Preset “SonyPrintPreset.” Provide settings as shown in the following screenshots.

General

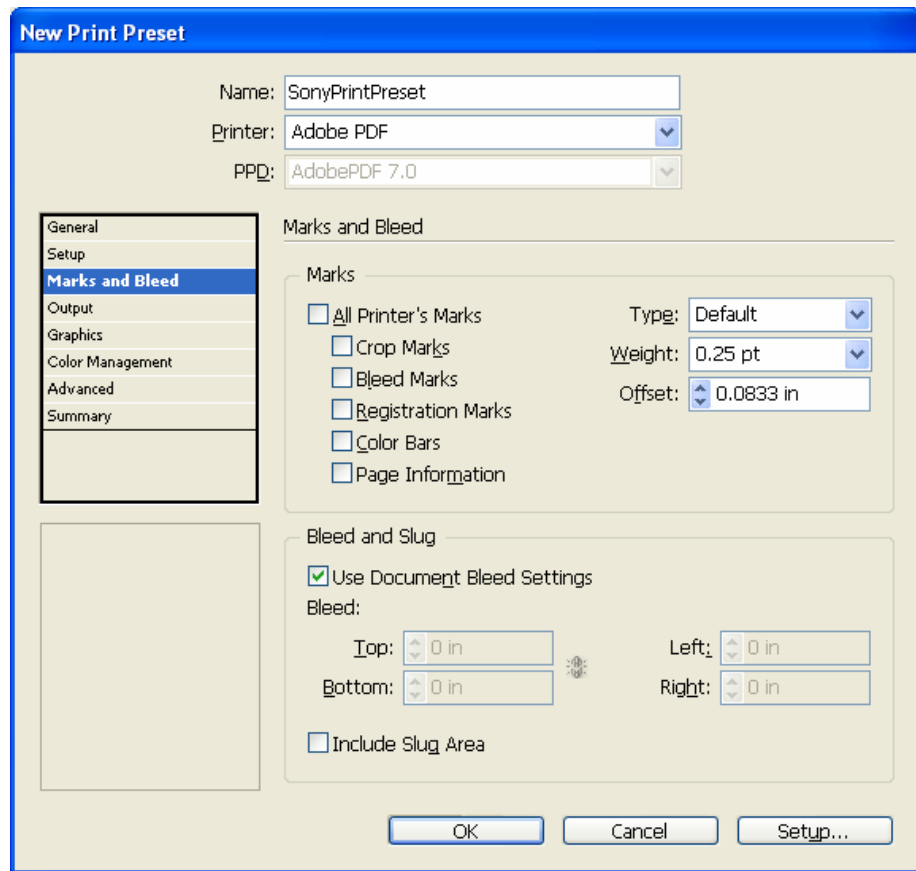


Setup

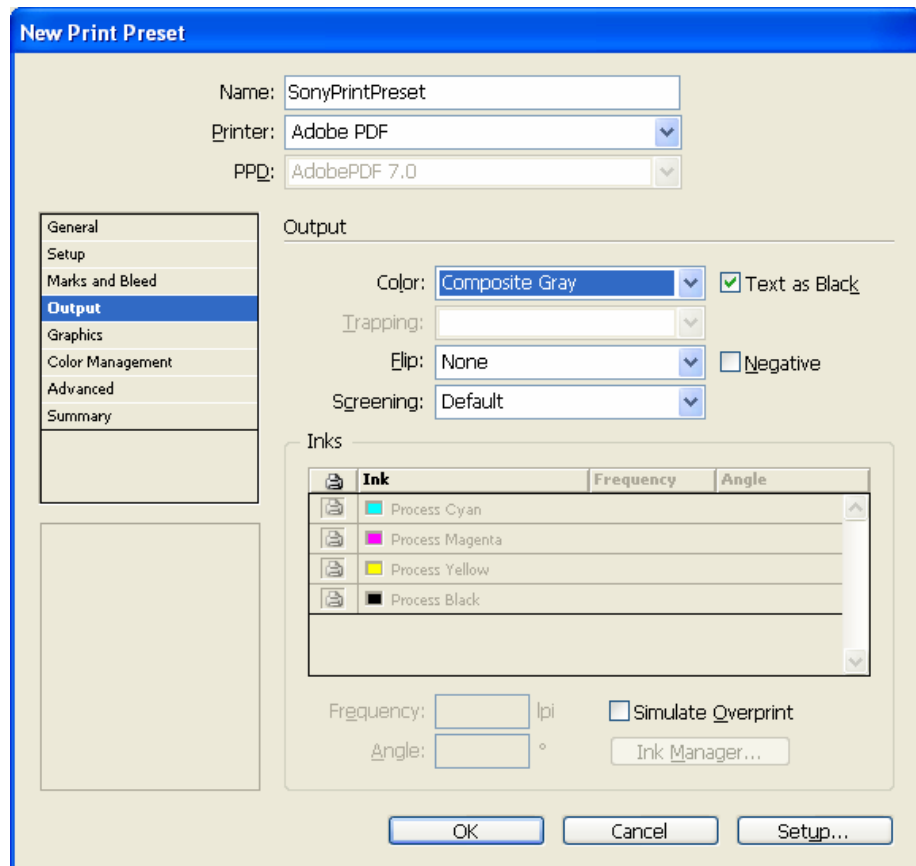
For "Paper Size," select "Custom. Then provide settings as shown below.



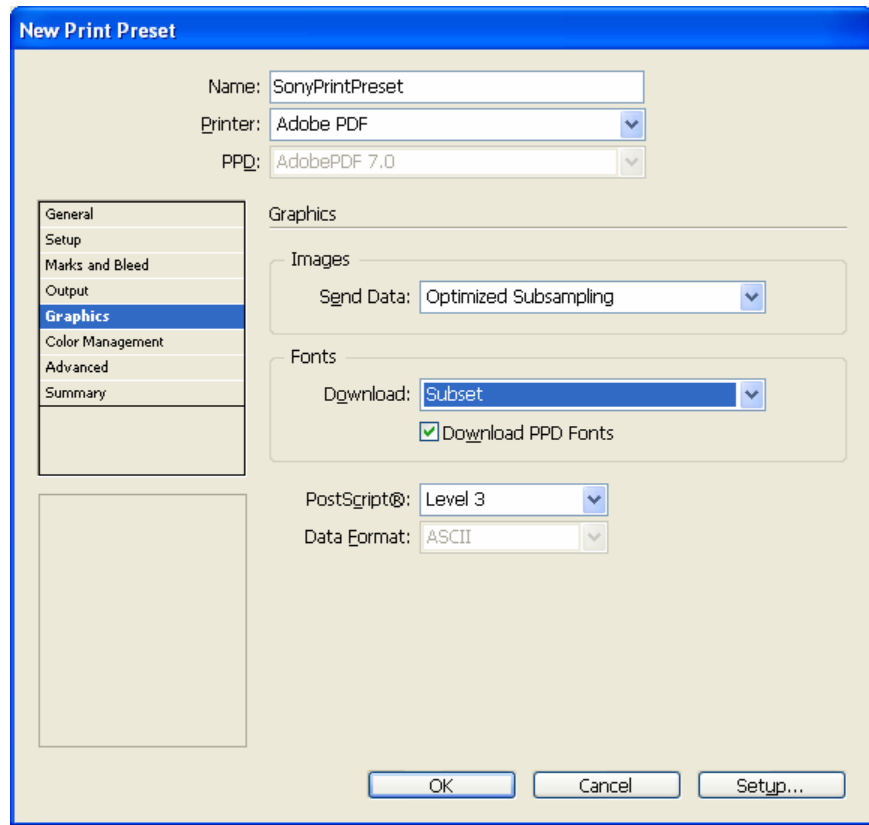
Marks and Bleed



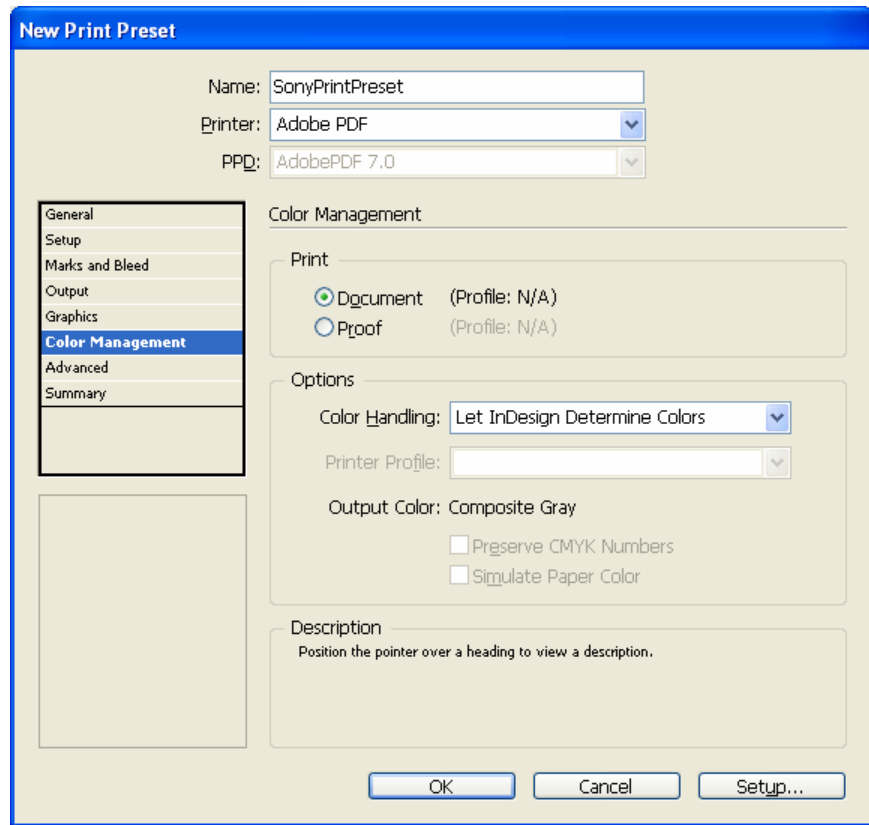
Output



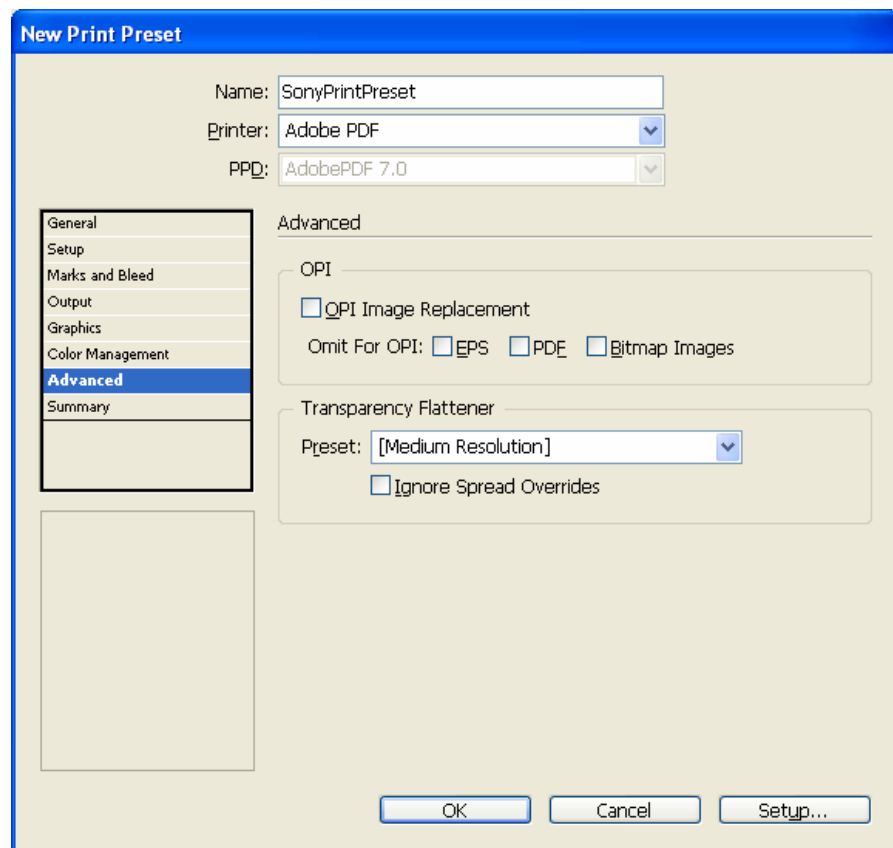
Graphics



Color Management



Advanced



Click "OK." The Print Preset that you have created will now be available as a setting in the InDesign Print menu.

9. To generate your PDF, select File → Print.

In the Print dialog, select "SonyPrintPreset" as the Print Preset.

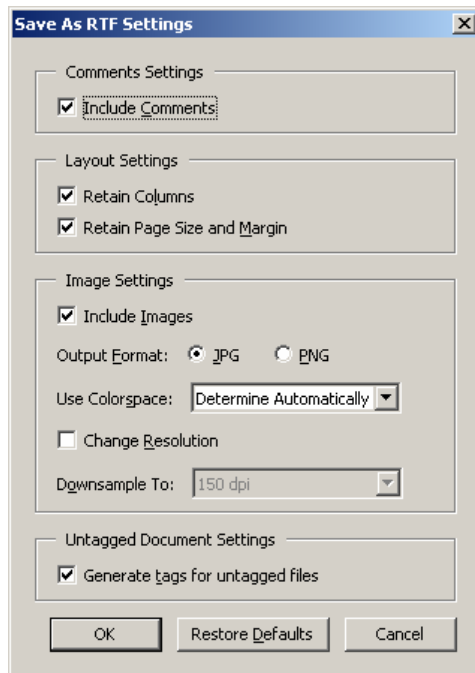
All fields will be populated with the settings from your Print Preset.

Click "Print."

V. Doing More with Adobe® Acrobat

Reformatting a PDF for the Sony® Reader in Microsoft® Word or OpenOffice.org Writer

1. Open the PDF in Adobe® Acrobat® Standard or Professional. Select File → Save As.
2. In the “Save as type” drop-down menu, select “Rich Text Format (*.rtf).” (Please note that if security settings have been applied to the PDF, this option may not be available.)
3. Click the “Settings” button. Select the settings shown in the screenshot below.

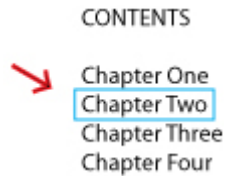


Name and save the RTF file.

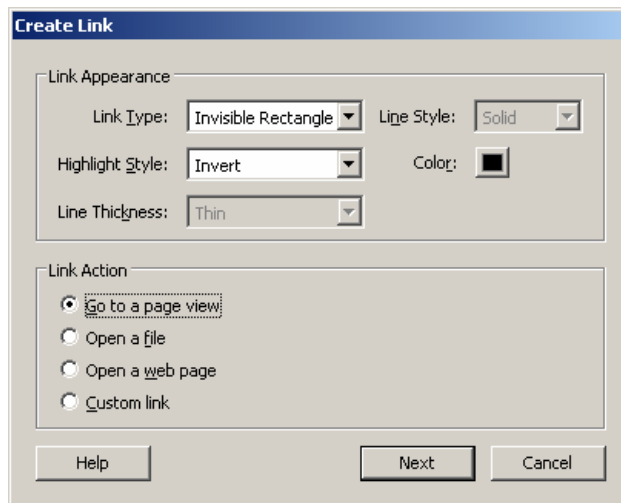
4. Open the RTF file in Microsoft® Word or OpenOffice.org Writer and optimize it for the Sony® Reader by applying settings provided in Section II of this instructional document.

Creating a linked Table of Contents in Acrobat

1. Open the PDF in Adobe® Acrobat® Standard or Adobe Acrobat Professional.
2. Open Tools → Advanced Editing → Link Tool.
3. Using the Link Tool, draw a rectangle around the text to be linked.

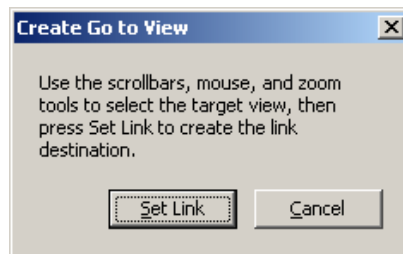


4. Releasing the cursor after drawing the rectangle will launch the “Create Link” dialog. Apply the settings shown below. Be sure that “Go to a page view” is selected.



Click “Next” to bring up the “Create Go To View” dialog.

5. DO NOT select “Set Link” immediately. Instead, scroll to the page that you want the link to navigate to when it is clicked in your PDF. (You can also use View → Go To → Page and enter the page number to go directly to that page.)

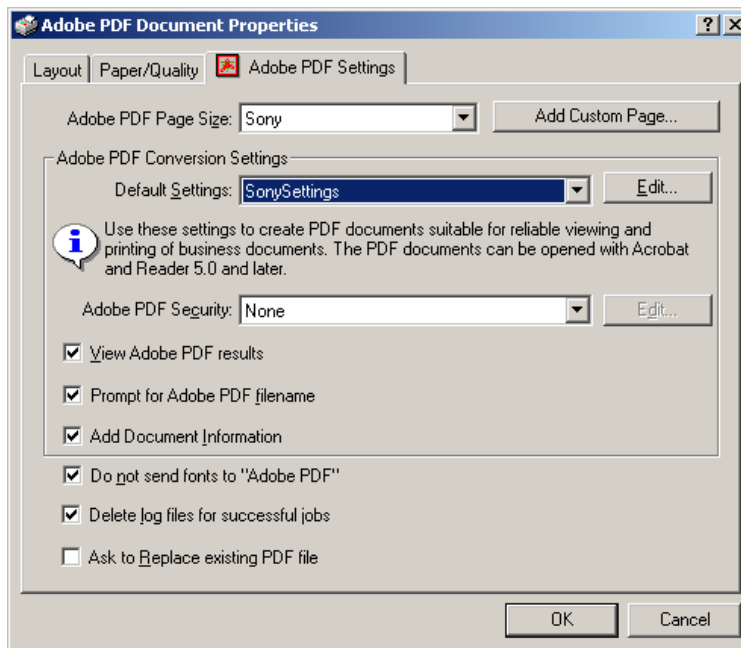


6. Click “Set Link” to complete the link.

Creating a Sony® Reader-optimized PDF preset

Once you create this preset, you will be able to use it to generate Sony Reader-optimized PDFs from all applications that allow printing. The preset can also be exported as a .joboptions file that can be readily installed in other Windows or Macintosh systems.

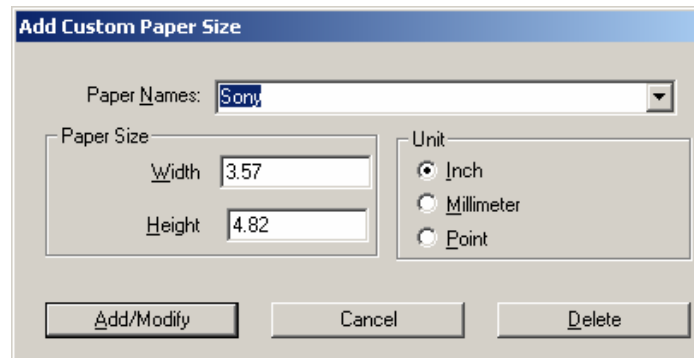
1. Click "Properties" in the "Print" dialog box in Microsoft Word or any of the other applications covered in this instructional document. (Note that this may appear as "Preferences" rather than "Properties," depending on the version of Windows® operating system being used.) Select the "Adobe PDF Settings" tab.



2. Click the "Add Custom Page..." button.

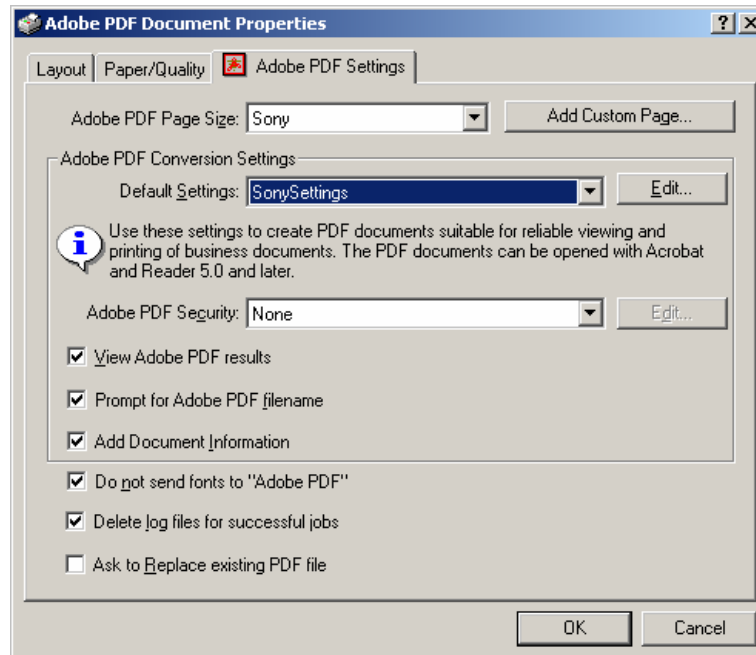
Name the custom paper size "Sony" (or whatever name you choose) in the "Paper Names" field.

Set Width at 3.57 and Height at 4.82. Set the "Unit" as "Inch." Then click the "Add/Modify" button. (This will return you to the "Adobe PDF Settings" tab.)



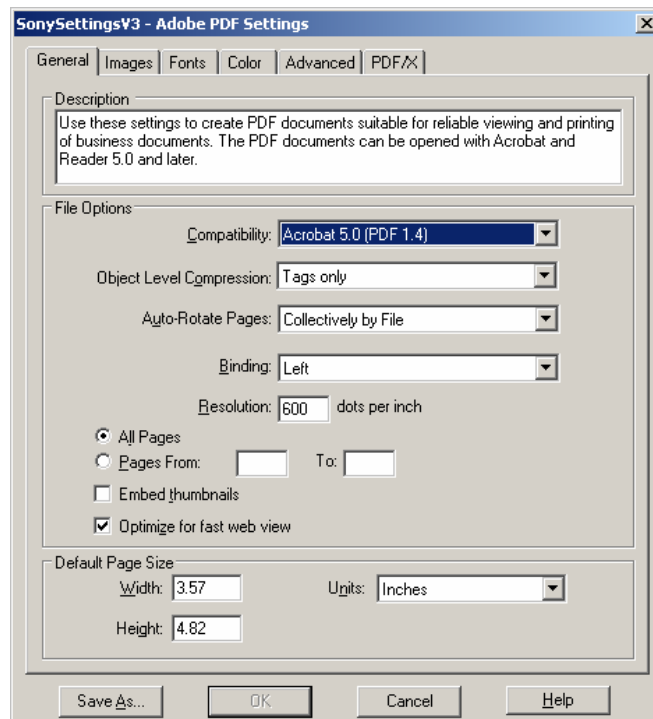
In the future, your new custom size will be available for you to select in the "Adobe PDF Settings" tab—no need to go through the "Add Custom Page" routine.

3. Select the "Edit" button next to the "Default Settings" field.

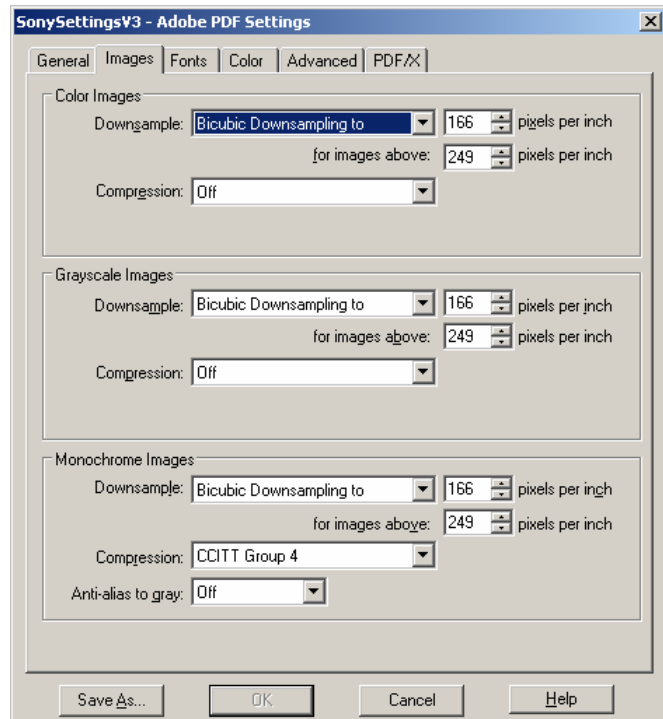


4. Select the settings shown in the following figures:

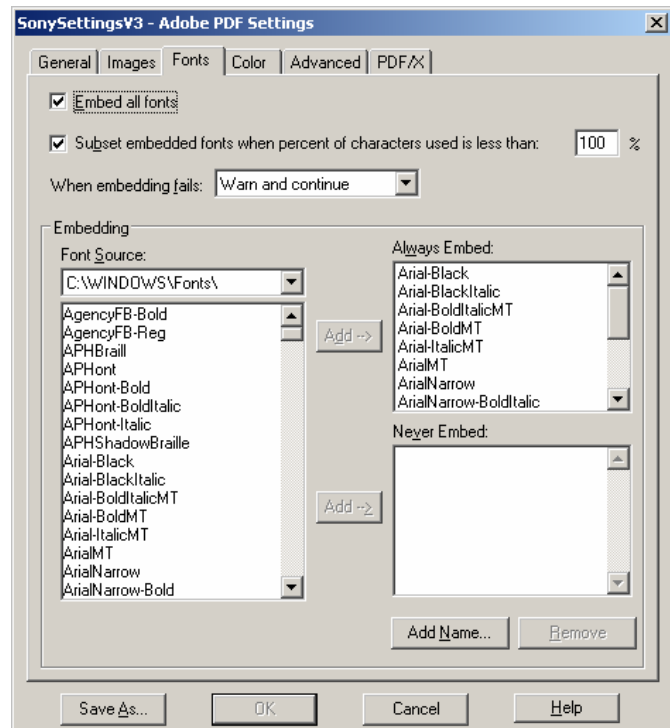
General tab



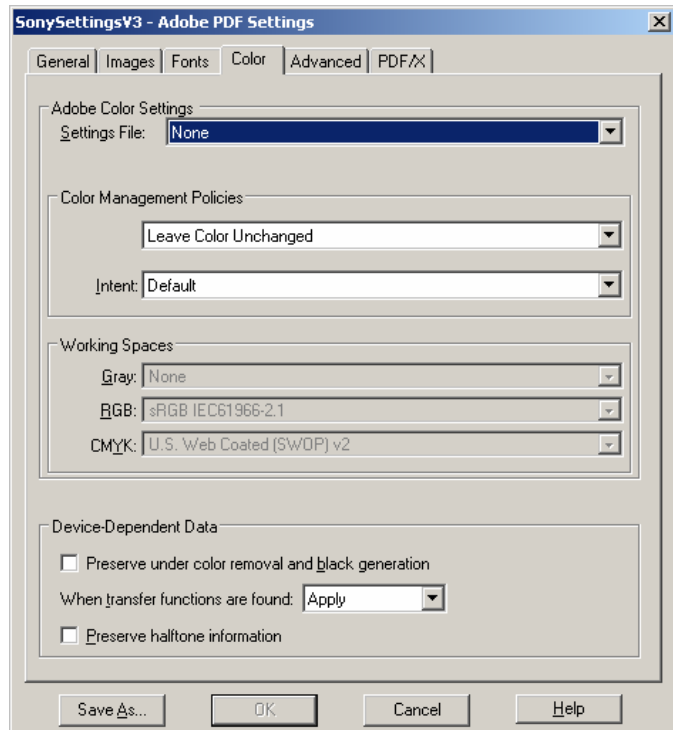
Images tab



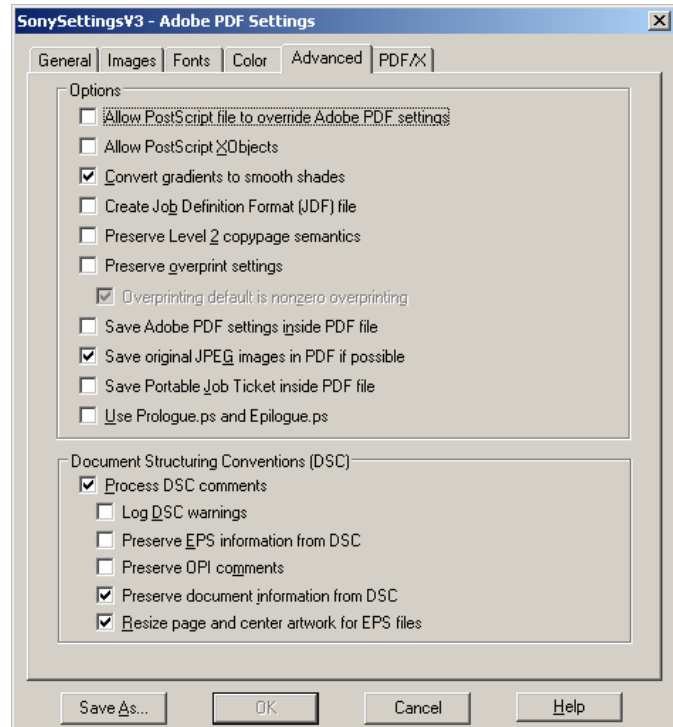
Fonts tab



Colors tab



Advanced tab



5. Click the “Save As” button and provide a name for the settings preset (for example, “SonySettings”). Next time you want to create a PDF optimized for the Sony® Reader, just select the Adobe PDF printer, click “Properties” or “Preferences,” and select your preset in the “Default Settings” list within the “Adobe PDF Settings” tab.

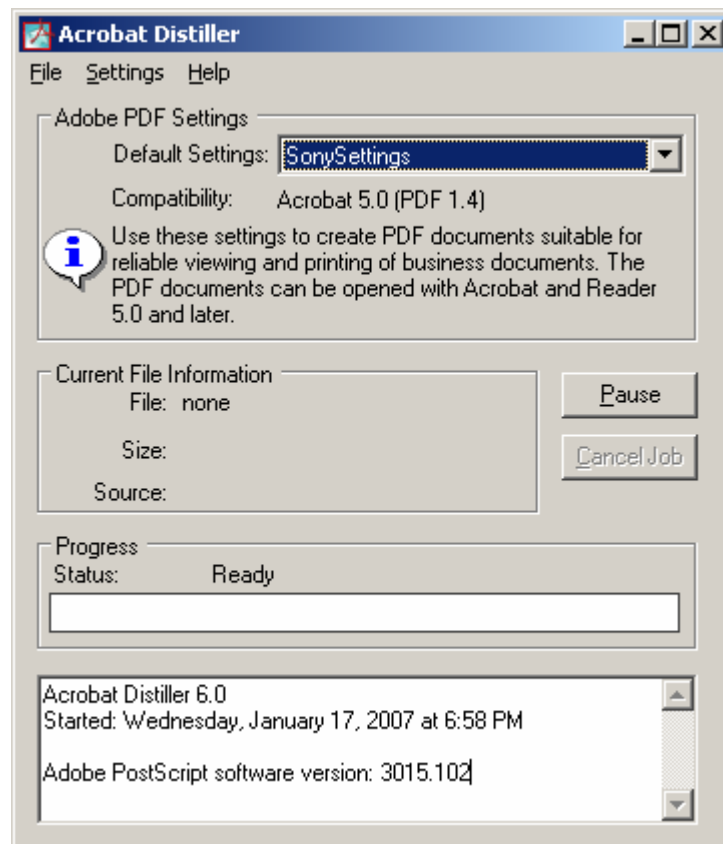
Using Adobe® Acrobat® Distiller to load Sony® Reader-optimized PDF settings as a preset within your applications

Acrobat Distiller is the rendering engine used within the Acrobat suite to generate PDFs as well as to manage rendering settings. It is included by Adobe along with both Acrobat Standard and Acrobat Professional.

1. Launch Acrobat Distiller.
2. Select Settings → Add Adobe PDF Settings.

Navigate to the directory where the .joboptions file is stored and select “Open.”

3. “SonySettings” will appear in the “Default Settings” menu in Distiller.



4. “SonySettings” will now also be available in the “Adobe PDF Settings” in other applications.

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