How to Convert Outlook Email Folder Into a Single PDF Document

An introduction to converting emails with AutoPortfolio[™] plug-in for Adobe[®] Acrobat[®]

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What Software Do I Need?

The AutoPortfolio[™] software requires a full version of Adobe Acrobat Standard or Professional for Microsoft Windows. It will not work with a free Acrobat Reader software that does not allow document editing and modification. The plug-in supports all versions of Adobe Acrobat starting from version 6. You can download a free 30 days trial version of AutoPortfolio[™] from

<u>http://www.evermap.com/autoportfolio.asp</u>. If you do not currently own a copy of Adobe® Acrobat® then you can download a trial version from <u>http://www.adobe.com/downloads</u>. The AutoPortfolio™ software, once installed, adds "AutoPortfolio Plug-in" sub-menu to the "Plug-ins" menu in Adobe® Acrobat®. Acrobat®.

Converting Emails into Single PDF Document

It is often necessary to take a folder of emails from Microsoft Outlook (or any other email application) and convert all emails including attachments into one regular PDF file. Once all emails and attachments are combined into a single searchable PDF document it becomes easy to add Bates stamps, view any page from any email and attachment, search and print. The output PDF document has the following page order:



The Adobe PDF Maker for Outlook provides two exporting options. It can export all emails either into a single PDF Portfolio or into multiple PDF files (one per each email). The PDF Portfolio is a special case of

the PDF file. It is an archive, a collection of multiple PDF documents. Although it offers some benefits, it is not convenient for document processing because all email attachments are still in their original formats and are not easy to search, read or print. It is also impossible to add Bates stamps to all pages of emails and their attachments. The solution is to convert all emails and attachments into one "flat" PDF file where attachments are converted into PDF format (if possible) and follow their parent emails.

Workflow Outline

The Microsoft Outlook uses PST file format to store email folders. Typically, there is a PST file that contains one or more email folders that need to be converted into a single PDF document. Here is the brief outline of the conversion procedure:

- 1. Open PST file in Microsoft Outlook application.
- 2. Convert selected folder into PDF Portfolio.
- 3. Start Adobe Acrobat and use AutoPortfolio plug-in to convert PDF Portfolio into regular PDF document.

Step 1: Loading PST file into Microsoft Outlook

Start the Microsoft Outlook application and select "File > Open > Outlook Data File..." from the menu (menu location can be different depending on your version of Outlook):



Step 2: Checking PDF Conversion Settings in Outlook

If you are performing this conversion for a first time, it is necessary to check Adobe PDF conversion settings in Microsoft Outlook to make sure they are properly configured. Select "Adobe PDF > Change Conversion Settings..." from the Outlook menu to open "Acrobat PDF Maker" dialog:

Settings Security Automatic Archival PDFMaker Settings Compatibility: Acrobat 9.0 (PDF 1.7 ADB Attachments: Include all attachments in t View Adobe PDF result Output Adobe PDF <u>P</u> ortfolio when creating Do not include folder name information Embed index for faster search Block download of external content	the Adobe PDF	>	
■ Enable Accessibility and Reflow with Tagg Page Layout Page <u>Size</u> : Letter ▼ Width: 8.50 Inches Height: 11.00 Inches Orientation: ● Portrait ● Landscape	Margins: Top: Botto <u>m</u> : Left: Right:	0.75 0.75 1.00 1.00	Inches Inches Inches Inches
Other Show this number of recent archives Show this number of recent archives (© 1987-2012 Adobe Systems Ind Adobe, the Adobe logo, Acrobat are either registered trademarks of the United States and/or other co	, the Adobe PDF or trademarks of	s licensors. A logo, PostSc	ript, and Reader

The Acrobat PDF Maker is part of the Adobe Acrobat installation and is responsible for exporting Outlook emails to PDF format. Make sure that "Attachment:" menu is set to "Include all attachments in the Adobe PDF" and "Output Adobe PDF Portfolio when creating a new PDF file" option is checked. You may also check other settings such as "Compatibility" and "Page Layout" to make sure they conform to your project requirements. In most cases, you do need to make any other changes to the settings. Press OK button to close this dialog and return back to the Outlook.

Step 3: Exporting Outlook Email Folder to PDF Portfolio File

Select an email folder (for example "Inbox") you want to convert and press right mouse button, then select "*Convert "Inbox" to Adobe PDF*" from the popup menu:



Specify output file name and location in the "Save Adobe PDF File As" dialog that will appear on the screen and press OK to start conversion. Once conversion is finished, the PDF Portfolio file will be created at the selected location.

Step 4: Starting Adobe Acrobat and Checking Conversion Preferences

The AutoPortfolio plug-in utilizes existing document conversion functionality that is available in the installed copy of Adobe® Acrobat®. All conversion from non-PDF formats into PDF documents is performed according to current Acrobat preferences. It is important to review these settings and make necessary adjustments in order to get the conversion results that conform to your project requirements. Select "Edit > Preferences" from main Adobe Acrobat menu to access conversion preferences. Select "Convert to PDF" category in order to see a list of all supported file formats.

Preferences			
Categories:		Converting To PDF	
Commenting Documents Full Screen General Page Display 3D & Multimedia Accessibility Action Wizard Catalog Color Management Convert From PDF Convert To PDF Forms Identity International Internet JavaScript Measuring (2D)	- III	3D Files Autodesk AutoCAD BMP Compuserve GIF EMF HTML JPEG JPEG2000 Microsoft Office Excel Microsoft Office Power Microsoft Office Word Microsoft Office Word Microsoft Publisher Multimedia PCX PNG	Click Edit Settings to

Most conversion settings do not require any adjustment and can be used with default configurations. However, by default, only a first worksheet is converted from Microsoft Excel spreadsheets into PDF format. It is necessary to adjust Acrobat conversion settings to allow conversion of multiple worksheets.

Editing Microsoft Excel Conversion Settings

Select "Microsoft Office Excel" format from a list of supported formats and click "Edit Settings" button in order to adjust conversion preferences for Excel worksheets:

Adobe PDF Settings for s	supported documents	×
Adobe PDF <u>S</u> ettings:	Standard 💌	E <u>d</u> it
Adobe PDF Security:	None	Edit
📝 Add <u>b</u> ookmarks to J	Adobe PDF file	
Add links to Adobe	PDF file	
Enable <u>a</u> ccessibility	and reflow	
Convert entire Excel	workbook	
ОК	Cancel	

Make sure "Convert entire Excel workbook" option is checked unless this option is not desirable for your specific project. Press "OK" button to save settings.

Editing Image Conversion Settings

Select "TIFF" and/or "BMP" format from a list of supported formats and click "Edit Settings" button. Adjust compression settings according to your requirements.

Adobe PDF Settings	×
Scan Optimizati	on and OCR Settings
Compression <u>M</u> onochrome:	JBIG2 (Lossless)
<u>G</u> rayscale:	JPEG (Quality : Medium)
<u>C</u> olor:	JPEG (Quality : Medium)

Press OK button to close Acrobat Preferences dialog.

Step 5: Starting AutoPortfolio[™] software

Select "Plug-ins > AutoPortfolio Plug-in > Convert Portfolio into Regular PDF" from the main Acrobat menu to start AutoPortfolio:

Plug-Ins Window Help		
AutoPortfolio Plug-in 🔹 🕨	Documentation and Getting Started	•
	Convert Portfolios Into Regular PDF	
/1 🖪 🖑 🗐 🖲	Convert PDF Files For Concordance and Summation (TIFF and Text)	
	Extract Files From Portfolio(s)	
	Extract Portfolio Metadata	
	Deduplicate Load Files	

Press the "Add File..." button to select PDF Portfolio created in the previous step:

Convert PDF Portfolios Into Regular PDF	×
Information Use this dialog to convert embedded files from one or more attachments) into a single regular PDF file.	re PDF Portfolios (including
Select Input Portfolios and Regular PDF Files	
Process each portfolio into a separate output (create output sub	-folders)
	Add Files Remove Remove All Sort Order
Select Output Options	
Output folder: C:\Data\Output\New folder\	Browse
 Extract and process attachments Convert non-PDF attachments into PDF format (if possible) Delete links in output documents 	Conversion Options File Naming Options
Help www.evermap.com	OK Cancel

Step 6: Selecting Emails for Conversion

Once you have select an input PDF Portfolio, the "Specify Sorting Order" dialog appears on the screen. If you want to process the entire portfolio, then simply press the "OK" button located in the lower-right corner of the screen. However, it is often advisable to convert large portfolios into several steps to keep size of output PDF document within reasonable limits. There are no any specific limitations, but the conversion of large files may produce very large output documents, degrade performance of your computer by consuming a lot of memory and take a long time to finish. It is recommended to keep the size of output document less than 1GB.

Specify Sorting Order - 4 record(s)

Select Records		

Click on column headers to sort records into desired processing order. Use "Select Records" menu for more options.

Filename	Description
THIS IS A PORTFOLIO TEST.pdf	"EverMap LLC" 9/12/2011 THIS IS A PORTFOL
Test for JPG attachments.pdf	"EverMap LLC" 9/13/2011 Test for JPG attach
Test for MS Word attachment.pdf	"EverMap LLC" 9/13/2011 Test for MS Word a
Text File Attachment Example.pdf	"EverMap LLC" 9/13/2011 Text File Attachmer
	THIS IS A PORTFOLIO TEST.pdf Test for JPG attachments.pdf Test for MS Word attachment.pdf

The simplest way to process only a part of the input Portfolio is to select emails "by record number":

- 1. Press "Select Records" menu and choose "Unselect All Records".
- 2. Press "Select Records" menu and choose "Select by Record Numbers..." submenu.

Select / Unselect Records By Numb	er 🛛 🔍
Select Record Range	
range of records for sele	g record numbers to specify a continuous action or unselection operation. Please hanges record numbers.
Starting Record Num Ending Record Num	
	OK Cancel

- 3. Enter starting and ending record numbers to select a range of records (emails).
- 4. Press OK button to close this dialog and select records (emails).
- 5. Inspect selection results all selected records should have a checkmark in the first column.
- 6. Press OK button to close "Specify Sorting Order" dialog.

Step 7: Selecting Processing Options and Output Folder

Once you have selected input PDF Portfolio it is going to appear in the input file list:

onvert PDF Por	tfolios Into Regular PDF	×
Information Us at	se this dialog to convert embedded files from one or mo itachments) into a single regular PDF file.	ore PDF Portfolios (including
Select Input Po	ortfolios and Regular PDF Files	
Process (each portfolio into a separate output (create output su	ıb-folders)
(CR)EverMa	p PDF \Test Documents \AutoPortfolio \Emails With Differ	ent Attachm Add Files Remove Remove All Sort Order
Select Output	Options	
Output folde	er: C:\Data\portfolio\	Browse
Convert r	and process attachments non-PDF attachments into PDF format (if possible) iks in output documents	Conversion Options File Naming Options
Help	www.evermap.com	OK Cancel

Press "Browse..." button and select an output folder where to put a converted PDF file. This folder will be used during the conversion process. You may see a lot of temporary files created there. Most files will be deleted at the end of the processing.

Make sure to check both "Extract and process attachments" and "Convert non-PDF attachments into PDF format" options if you want to convert email attachments into PDF format.

Check "Delete links in output documents" option to remove all links to attachments in native format. If this option is not checked, then output PDF document will contain all non-PDF email attachments in their native file format. For example, if an email contains a Microsoft Word attachment, then in the output file, the link to the MS Word document will be removed. The attachment will only be available in its PDF representation. Checking this option may substantially decrease the output file size. Click the "Conversion Options..." button to open the "File Conversion Options" dialog.

Exclude File Types	Settings
File extensions (type one per line):	 Convert unknown file types as plain text Extract content of ZIP and MSG files Insert a cover page in front of each document Cover page style: Name of the File or Attachment
TIP: type one file extension per line without a period symbol. For example: "WMV"	Copy files that did not convert to a folder: Select Folder

This dialog provides a way to select the options that affect how certain non-PDF files are converted into PDF format. Click the "Select Folder..." button and select a folder on your computer where you want to place copies of the file attachments that did not convert into PDF format.

Step 8: Starting the Conversion Process

Press OK button located on "Convert PDF Portfolio Into Regular PDF" dialog to start the conversion process. Please note that the conversion process may take a considerable amount of time depending on the size of the input portfolio. It is generally a good idea to process smaller portfolios. The "PDF Portfolio Extraction Cover Page" document is automatically created for each job and displayed on the screen. The standard Acrobat progress dialog shows the progress at the bottom-right corner of the screen.



Once the processing is completed, a report message is going to appear on the screen asking if you want to display a processing report. Click "OK" to display a detailed processing report in your default web

browser (this report is in HTML format):



Step 8: Reviewing the Results

The AutoPortfolio processing report will be automatically open in the web browser window. The report lists the file name, description (from a metadata field), creation and modification dates, file size in bytes, number of attachments, and MD5 hash value:

PDF Portfolio Extraction	Reș ×						
→ C ▲ ③ file	e:///C:/Data/portfo	lio/PDF%20Portfo	lio%20Ex	traction%	20Repo	ort.htm	🖾 🖧 🔛
 Input PDF Package 	F Portfolios proc ta\portfolio\ CSV text file) ve / File: <u>C:\EverMap P</u> acted files (first level t files: 4	essed: 1 rsion of this rep DF\Test Documents\	ort: <u>C:\D</u>	ata\port		DF Portfolio Extraction Report	.CSV
Filename	Original Filename	Description	Created	Modified	File Size	MD5 Hash	Num Attachments
THIS IS A PORTFOLIO TEST.pdf	THIS IS A PORTFOLIO TEST.pdf	"EverMap LLC" 9/12/2011 THIS IS A PORTFOLIO TEST.pdf	09/13/11 08:29:43		59038	edca43ddeb35b3809a5de54790dfe22b	1
Attachments:	•					•	
Multilinetext.xlsx	Multilinetext.xlsx		06/05/12 15:03:32		8334	b0b1a51e23bb714ac84967e7363c7cc9	0
Multilinetext.pdf	Multilinetext.xlsx		06/05/12 15:04:18		26351	e76d30360bf6ccf2f99bcb745df6bdb5	0
Test for JPG attachments.pdf	Test for JPG attachments.pdf	"EverMap LLC" 9/13/2011 Test for JPG attachments.pdf	09/13/11 08:29:43		56250	5fbfb00ecf2e253a60691365645bb24b	1

It is a good idea to inspect the report and see if there are any file attachments that were not converted into a PDF file format. You would see a red line in the table for every file attachment that failed to convert. Scroll down to the end of the "AutoPortfolio Process Report" to see the total count of non-PDF

file attachments that were converted and not-converted into a PDF format. Please note that there are some files that cannot be converted to PDF format due to number of different reasons. Some file formats do not have a visual representation and therefore cannot be converted into PDF. Passwordprotected PDF and Microsoft Word documents also cannot be automatically inserted into output PDF document.

Attachment Example.pdf	Example.pdf	Attachment Example.pdf	08:29:43	08:29:43	54217		
Attachments:			•				
LeadingZeros.txt	LeadingZeros.txt			06/05/12 15:04:35	30	a891b28275485120d2afe0f041f2acf3	0
LeadingZeros.pdf	LeadingZeros.txt			06/05/12 15:04:35	4214	5f7084a56120c17417376f9dd318c67c	0

Now, let's look at the output PDF document that is going to be automatically open in Adobe Acrobat once processing is completed:

🔁 Converted To PDF.pdf - Adobe Acrobat Pro						
<u>File Edit View Plug-Ins Window H</u> elp ×						
Create ▼ Image: Create ▼ Image: Create ▼ Image: Create ∇ Image:						
	Bookmarks	nen ballasia Degen Massachika Ital				
P	e=• 🛍 🖾 🔅	Non Sector Control of the Control of				
 EverMap LLC" 9/12/2011 THIS IS A PORTFOLIO TEST.pdf Attachment 1: Multilinetext.xlsx TeverMap LLC" 9/13/2011 Test for JPG attachments.pdf Attachment 1: EverMapLogo.jpg TeverMap LLC" 9/13/2011 Test for MS Word 						
	attachment.pdf Attachment 1: THIS IS A TEST FOR MS WORD FILE.docx File.docx File.doft Attachment 1: LeadingZeros.txt					

All individual PDF portfolio entries (PDF files) are now stored in a single PDF document that can be processed using standard Adobe Acrobat tools. Every file (email in the case of email portfolios) is

bookmarked with child bookmarks pointing to the corresponding file attachments. The "Description" metadata field is used for the bookmark title. Click on the bookmark to automatically display a corresponding document or attachment. The output document is ready now to be Bates-stamped and/or printed. The output document is automatically named "Converted To PDF.pdf". Use the "File > Save As..." menu to save this document under a different filename or location.

Getting Help

Contact technical support (<u>mailto:tech@evermap.com?subject=Technical Support Request</u>) for help with configuring AutoPortfolio for your particular document or project. It is always helpful to include a sample PDF document.

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How to convert Outlook Email Folder Into Single PDF Document ™

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