How to create interactive documents

You can use Adobe InDesign CS6 to create dynamic web content or interactive documents. InDesign supports export to SWF or PDF.

Interactive web documents for Flash

For SWF files, you specify the page size according to monitor resolution (such as 800x600). An exported SWF file is ready for viewing in Adobe Flash Player and may include interactive elements such as page transitions, hyperlinks, and navigation buttons.

In this guide, you will learn how to create web documents by using InDesign (**Figure 1**). Steps include how to create an interactive button, how to add a page transition, and how to export to SWF format. InDesign includes many more options for adding interactivity to your web document. Once you are comfortable with the basics, try experimenting with additional features such as rollover and click states for buttons, animating objects by using animation motion presets, and modifying the export SWF options.

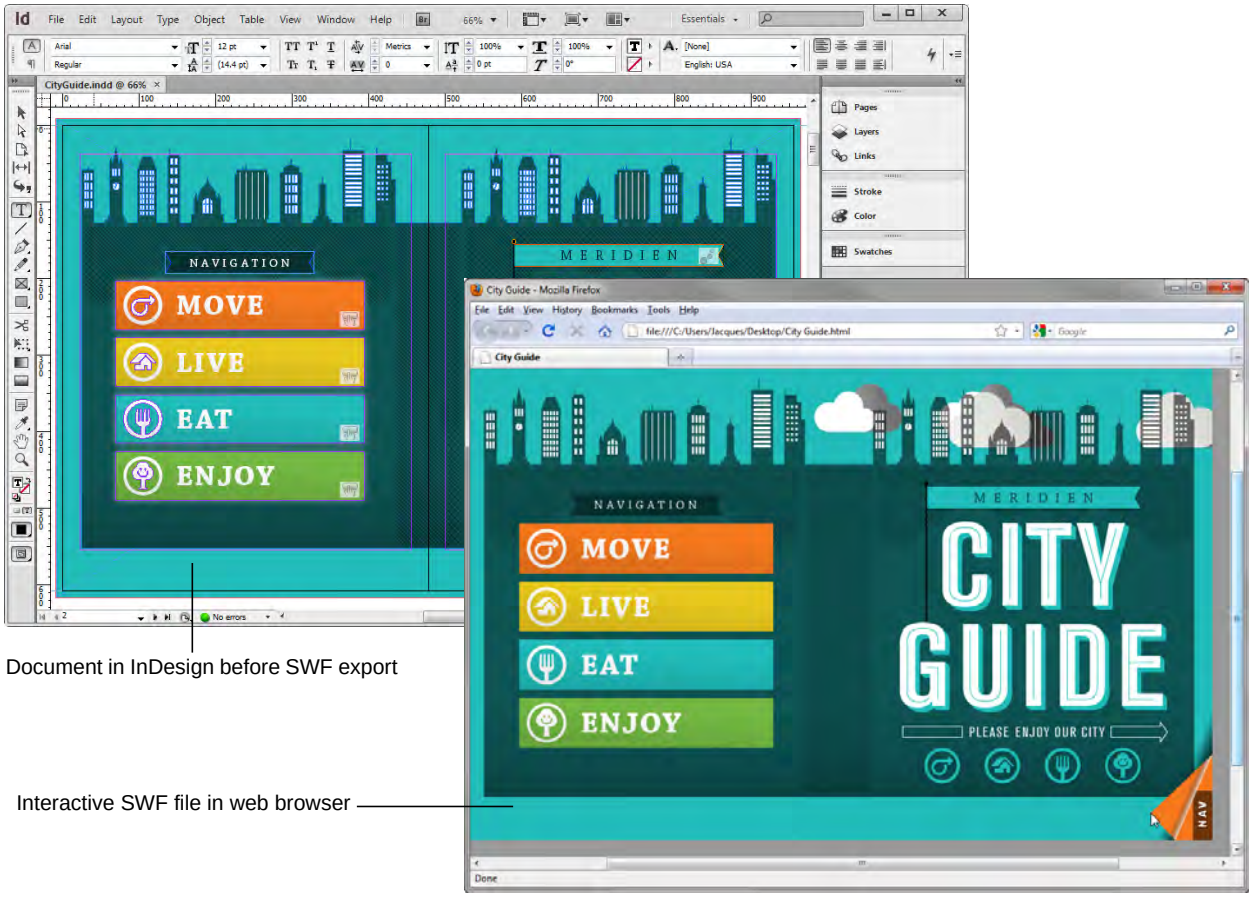

Figure 1 Create interactive documents by using InDesign

Consider the following factors when designing your InDesign document for SWF output.

Document setup factors

- *How InDesign pages are converted* When you export to SWF, InDesign spreads become separate clips in a timeline, like slides in a slide show. Each spread is mapped to a new keyframe. In Flash Player, you advance through the spreads of the exported document by pressing arrow keys or clicking interactive buttons.
- *Page size* When you create a document, you can choose a specific resolution, such as 800x600, from the Page Size menu in the New Document dialog box. During export, you can also adjust the scale or resolution of the exported SWF file.

Conversion factors

- *Color* SWF files use RGB color. When a document is exported to SWF, InDesign converts all color spaces (such as CMYK and LAB) to sRGB. InDesign converts spot colors to equivalent RGB process colors. To avoid unwanted color changes in artwork with transparent text choose Edit > Transparency Blend Space > Document RGB. To avoid unwanted color changes in images with transparency, avoid using a lossy compression during export.
- *Text* When exporting to SWF, you can determine whether to output text as Flash text or convert it to outlines or pixels. Text exported as Flash Classic Text remains fully searchable in web browsers when saved as SWF files.
- *Images* When you export images to SWF, you can change image compression, JPEG quality, and resolution settings during export.
- *Transparency* Before exporting to SWF, make sure that transparent objects do not overlap any interactive element, such as a button or hyperlink. If an object with transparency overlaps an interactive element, the interactivity may be lost during export. In some instances, choosing a lossy compression reduces the quality of images with transparency. When exporting, choose PNG (Lossless) to improve the quality.

Interactivity factors

You can include buttons, page transitions, hyperlinks, animation, and media files in exported SWF files.

- *Buttons* For buttons in an exported SWF file, the Next Page and Previous Page actions are especially useful controls for playback in Flash Player. However, some actions that work in interactive PDF files have no effect in Flash Player. When you choose an action in the Buttons panel, do not select an option from the PDF Only section.
- *Page Transitions* All page transitions work well in Flash Player. In addition to page transitions that appear when you turn the page, you can add an interactive page curl during export that lets you drag corners of pages to turn them.
- *Hyperlinks* Create links to websites or to other pages in the document.
- *Movies and sound clips* Movies and sound clips are included in an exported SWF file if they're in SWF format for movies and MP3 format for sound clips.

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To create interactive SWF (Flash) files for the web:

1. Start InDesign and choose File > New > Document.

   The New Document dialog box appears (**Figure 2**).

2. When creating a document intended for the web, choose Web from the Intent menu in the New Document dialog box.

3. Enter **2** or more pages in the Number Of Pages box.

4. Choose the default 800 x 600 from the Page Size menu.

5. Click OK to close the New Document dialog box.

   First, you need to create an interactive button that allows users to move from page to page in the exported SWF file.

6. Import an image, draw a shape, or add text to the document.

7. Use the Selection tool (**Figure 3**) to select the image, shape, or text frame that you want to convert to a button.

8. Choose Window > Interactive > Buttons And Forms.

   The Buttons And Forms. panel appears (**Figure 4**).

   Note: Sample buttons are also available. Click the Buttons And Forms panel menu to access the Sample Buttons And Forms panel (**Figure 5**), and scroll down for buttons. You can drag predefined navigation buttons and form elements into your document and attach actions to these instead of an existing image, shape, or text frame in the document.

9. Click the Convert To Button icon in the Buttons And Forms panel (**Figure 4**).

   The object is converted to a button and the Buttons And Forms panel is updated.

10. Name the new button in the Name text box and confirm that the Hidden Until Triggered option is not selected.

    Next, you need to define the mouse event and assign an action for the button.

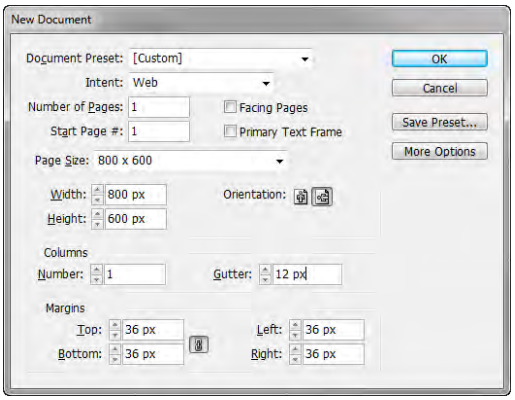

Figure 2 New Document dialog box

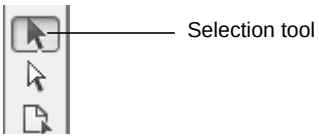

Figure 3 Tools panel

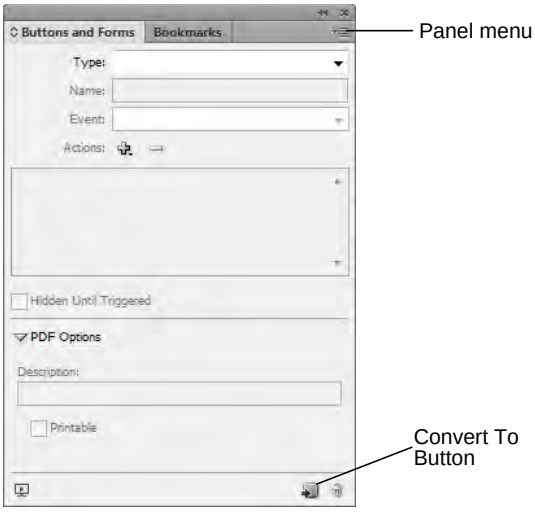

Figure 4 Buttons And Forms panel

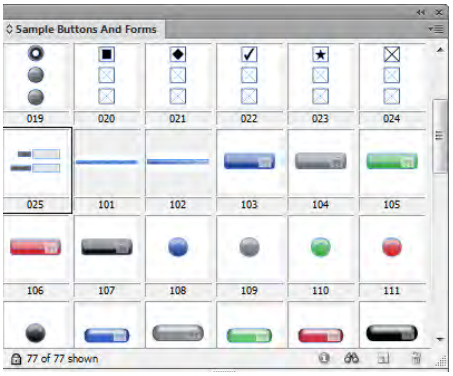

Figure 5 Sample Buttons and Forms panel

11. Click the Event menu, and select from the available options (**Figure 6**). An *event* defines how actions are activated.

- *On Release Or Tap* When the button is released after a click or a tap. This is the most commonly used event, because it gives the user one last chance to drag the cursor or touch off the button and not activate the action.
- *On Click* When the button is clicked (without being released). Unless you have a specific reason for using On Click, it's preferable to use On Release so that users have a chance to cancel the action.
- *On Roll Over* When the mouse pointer or touch action enters the button area defined by the button's bounding box.
- *On Roll Off* When the mouse pointer or touch action exits the button area.

12. Click the Add New Action button, and choose an action to assign to the event you just selected.

For example, if you are working with a multipage spread, you might choose Go To Next Page from the list of destination options (**Figure 7**).

If you choose Go To URL, specify the web page address. Some actions, such as Go To Next View, do not have additional settings.

13. With the object still selected, choose Window > Interactive > Page Transitions to add page transitions such as wipes or dissolves.

The Page Transitions panel appears (**Figure 8**).

14. From the Transition menu, select Page Turn (SWF Only).

You can move your mouse over the Preview area to see how the transition works.

15. Choose File > Save.

16. To export the document to SWF format, choose File > Export.

The Export dialog box appears.

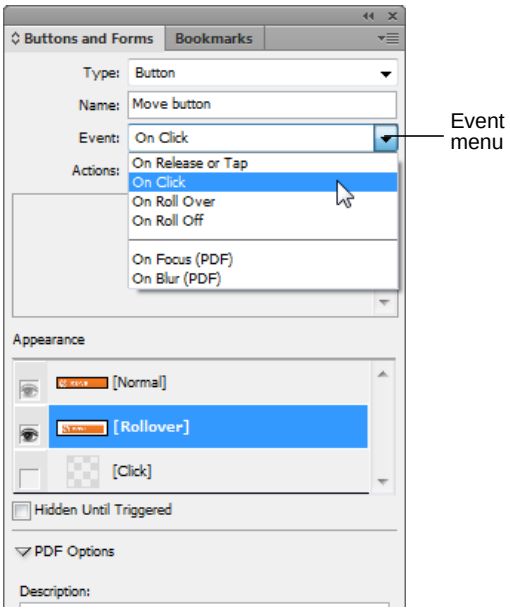

Figure 6 Event menu

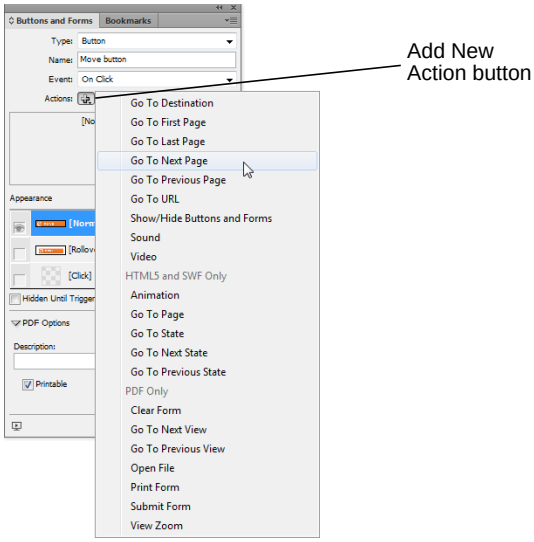

Figure 7 Add New Action menu

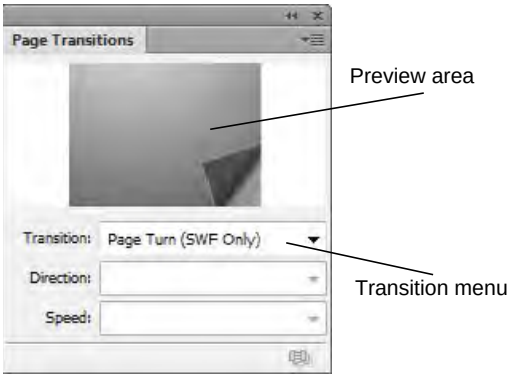

Figure 8 Page Transitions panel

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17. Choose Flash Player (SWF) from the Save As Type (Windows) or Format (Mac OS) menu, and click Save.

The Export SWF dialog box appears (**Figure 9**).

You can specify the export options in the Export SWF dialog box.

For this example, accept the default export options. For more information about Export SWF options, see "SWF export options" in InDesign Help.

18. Click OK.

The Generate Flash Player (SWF) progress dialog box appears and the file is processed.

The file opens in your default browser.

19. Test the button interactions in your interactive SWF file (**Figure 10**).

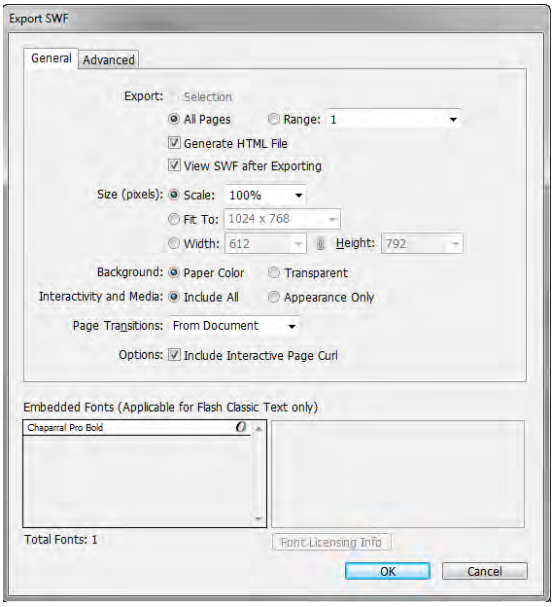

Figure 9 Export SWF dialog box

Figure 10 Testing hyperlinks in the browser

Animation

You can use Animation effects to make objects move in InDesign documents you export as SWF files. For example, you can apply a motion preset to drop a heading in from the top or to make an image of an automobile appear to move in from the right side of the screen and screech to a halt (**Figure 11**). Use the following tools and panels to animate documents.

- *Animation panel* Apply a motion preset and edit settings such as duration and speed.
- *Direct Selection tool and Pen tool* Edit the path on which the animated object travels.
- *Timing panel* Determine the order in which objects on a page are animated.
- *Preview panel* View the animation in an InDesign panel.

Figure 11 Examples of animation options

For more detailed information about how to use animation in InDesign, refer to InDesign Help.

Animating a document with motion presets

Motion presets are pre-made animations that you can apply to objects quickly. Use the Animation panel to apply motion presets and change animation settings such as duration and speed. The Animation panel also lets you specify when an animated object plays.

These motion presets are the same as those found in Adobe Flash Professional CS6. You can import any custom motion preset created in Flash Professional, and you can save motion presets you create and edit for sharing with others.

Note: Animation features are supported only when exporting to Adobe Flash Player (SWF). They are not supported when exporting to Interactive PDF. To add animation effects to a PDF file, export a selection as a SWF file from InDesign and place that SWF file in the InDesign document.

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Motion preset options

Motion preset options appear in the Animation panel (**Figure 12**). To display the Animation panel, choose Window > Interactive > Animation. Click the disclosure triangle beside Properties to display advanced settings.

- *Name* Specify a name for the animation. Descriptive names are especially useful when setting up an action that triggers the animation.
- *Preset* Choose from a list of predefined motion settings.
- *Event(s)* By default, On Page Load is selected, which means the animated object plays when the page opens in the SWF file. Choose On Page Click to trigger the animation when readers click the page. Choose On Click (Self) or On Roll Over (Self) to trigger the animation when readers click the object or move the mouse over it. If you create a button action that triggers the animation, On Button Event is selected. You can specify multiple events to start the animation. If you select the On Roll Over (Self) event, you can also select Reverse On Roll Off. This option reverses the action of the animation when the mouse moves off the object.
- *Create Button Trigger* Click this button to trigger the animation from an existing object or button. After you click Create Button Trigger, click the object that triggers the animation. The object is converted to a button, if necessary, and the Buttons panel appears.
- *Duration* Specify how much time it takes for the animation to occur.
- *Play* Specify the number of times the animation is played, or select Loop to cause the animation to play repeatedly until it's stopped.
- *Speed* Choose an option to determine whether the animation speed is a steady rate (None), starts slowly and speeds up (Ease In), or slows down at the end (Ease Out).

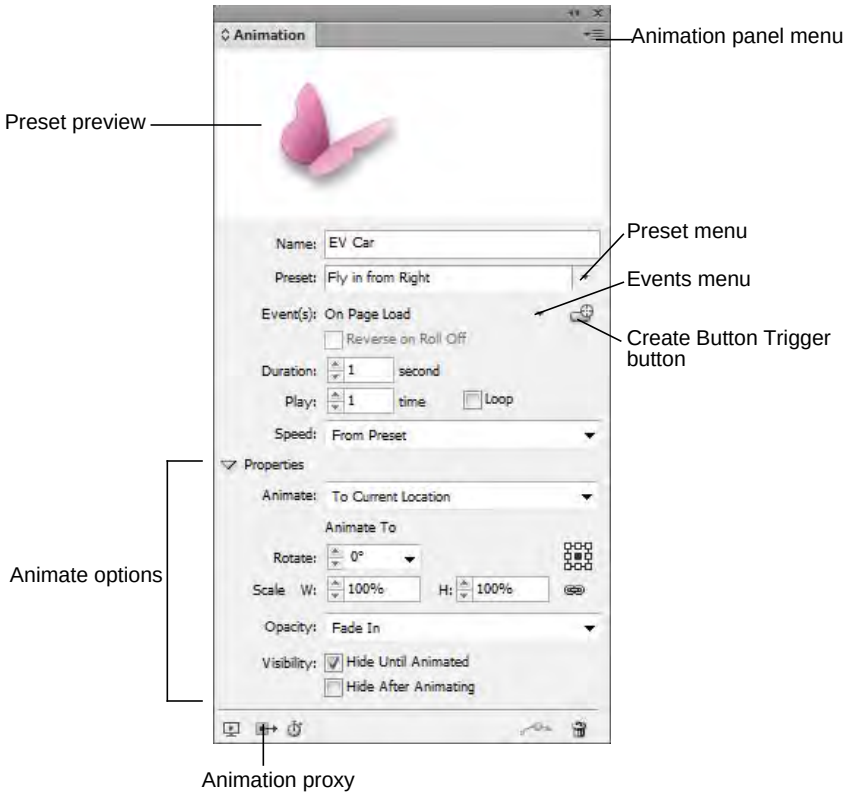

Figure 12 Animation panel

The following options are available when Properties is expanded (**Figure 12**).

- *Animate* Choose one of the following settings from the Animate menu. Each setting is illustrated in the example (**Figure 13**).
  - *From Current Appearance* uses the object's current properties (scale percentage, rotation angle, and position) as the starting point of the animation.
  - *To Current Appearance* uses the object's properties as the ending point of the animation. This option is especially useful in slide shows. For example, objects that fly in from off the page can appear on the page rather than on the pasteboard, improving the appearance of the printed document.
  - *To Current Location* uses the current object's properties as the starting point of the animation and the object's position as the ending point. This option is similar to From Current Appearance, except that the object finishes in its current location and the motion path is offset. This option is especially useful for certain presets, such as blurs and fades, to prevent the object from appearing in an undesirable state at the end of the animation.

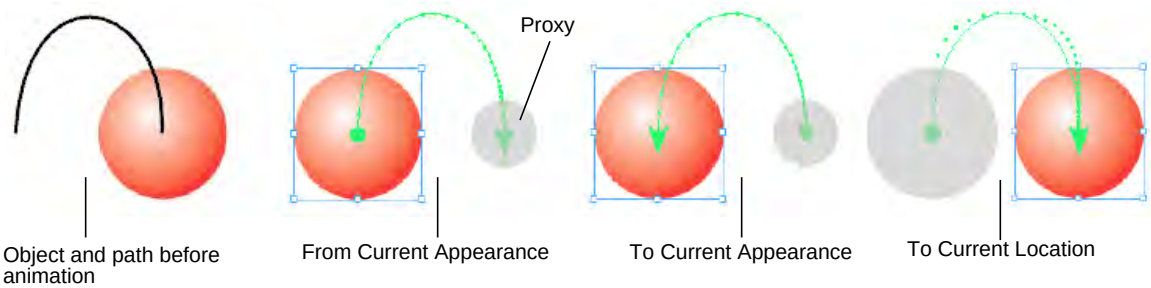

Figure 13 Animate settings

Note: To display the proxy at the end of the motion path, click the Show Animation Proxy at the bottom of the Animation panel. A *proxy* is the visual representation of the object at the end of a motion path.

- *Rotate* Specify a rotation angle that the object completes during the animation.
- *Origin* Use the proxy to specify the origin point of the motion path on the animated object.
- *Scale* Specify a percentage value to determine whether the object increases or decreases in size during playback.
- *Opacity* Choose an option to determine whether the animation remains solid (None), gradually becomes visible (Fade In), or gradually becomes invisible (Fade Out).
- *Visibility* Select Hide Until Animated or Hide After Animating to make an object invisible before or after playback.

To animate a document with motion presets:

1. Place the object you want to animate in your document.
2. Choose Window > Interactive > Animation.

   The Animation panel appears (**Figure 12**).

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3. Choose a motion preset from the Preset menu, such as Fly In From Right.

   A green *motion path* appears, indicating the start, finish, and travel path of the object (**Figure 14**).

4. Specify other motion preset options such as Event(s), Duration, Play, and Speed.

5. To edit the motion path, use the Pen tool and Direct Selection tool.

6. (Optional) If you place more than one object in the document, use the Timing panel (Window > Interactive > Timing) to determine the order of when animated objects play (**Figure 15**).

   For example, you can change one set of animations that occur when the page is loaded, and then change another set of animations that occur when the page is clicked.

   Animated objects are listed in the order they were created. Animations listed for the Page Load event occur sequentially by default. Animations listed for the Page Click event are played in sequence each time the page is clicked.

7. Choose Window > Interactive > SWF Preview to preview the animation in InDesign (**Figure 16**).

8. If you made changes to the motion preset and you want to save the custom preset for other uses, choose Save from the Animation panel menu.

   Note: You can also delete, duplicate, import, or export motion presets from the Animation panel menu.

9. Type a name for the preset and click OK.

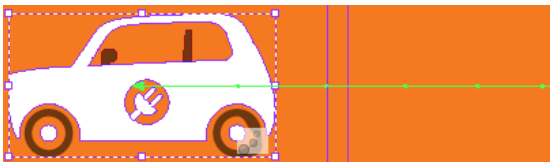

Figure 14 Motion path

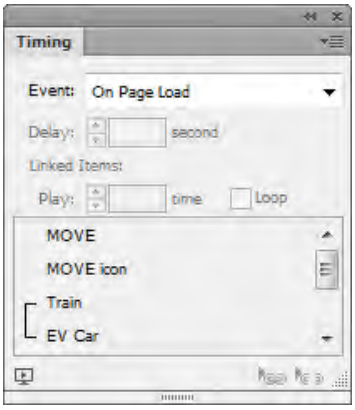

Figure 15 Timing panel

Figure 16 SWF Preview panel

Dynamic PDF documents

Creating a dynamic PDF document is a good way to create an interactive slide show. As with interactive SWF documents, you can create interactive PDF documents with buttons, movies and sound clips, hyperlinks, bookmarks, and page transitions. You can also set up documents in InDesign and convert themto forms in Acrobat.

In this guide you will learn how to create dynamic PDF documents by using InDesign. Steps include how to create a bookmark, insert a URL link, apply a decorative page transition, and export to PDF format. Once you are familiar with the basics, try adding movies and sound clips into your dynamic PDF document.

Create interactive documents for PDF

You can export Adobe PDF documents that include the following interactive features.

- *Bookmarks* Bookmarks you create in the InDesign document appear in the Bookmarks tab on the left side of the Adobe Acrobat or Adobe Reader window. Each bookmark jumps to a page, text, or graphic in the exported PDF file.
- *Movies and sound clips* You can add movies and sound clips to a document, or you can link to streaming video files on the Internet. These movies and sound clips can be played back in the exported PDF file.
- *Hyperlinks* In an exported PDF document, clicking a hyperlink jumps to another location in the same document, to a different document, or to a website. You can create hyperlinks to pages, URLs, text anchors, e-mail addresses, and files. If you create a hyperlink to a page or text anchor in a different document, make sure the exported files appear in the same folder.
- *Cross-references* A cross-reference refers readers from one part of your document to another in the exported PDF file. Cross-references are especially useful in user guides and reference manuals. When you export a document with cross-references to PDF, the cross-references act as interactive hyperlinks.
- *Page transitions* Page transitions apply a decorative effect, such as a dissolve or wipe, when you turn the page in the exported PDF while in Full Screen mode.

To create an interactive document for PDF:

1. Start InDesign and choose File > New > Document.

   The New Document dialog box appears.
2. When creating a document intended for printing, accept the default Print from the Intent menu in the New Document dialog box.
3. Enter **2** or more pages in the Number Of Pages box.
4. Choose Letter from the Page Size menu.
5. Click OK to close the New Document dialog box.

   The first step is to create a bookmark to another section of the document.
6. Choose Window > Interactive > Bookmarks.

   The Bookmarks panel appears (**Figure 17**).
7. Select text in your document.

   By default, the text you select becomes the bookmark label.
8. Do one of the following to create the bookmark:
   - Click the Create New Bookmark button in the Bookmarks panel.
   - Choose New Bookmark from the panel menu.

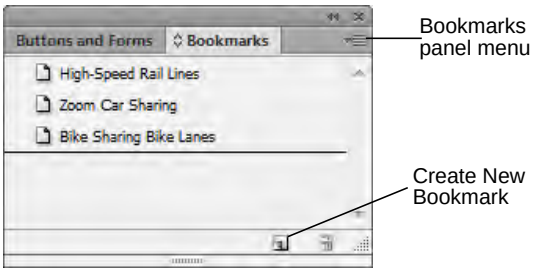

Figure 17 Bookmarks panel

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9. Accept the default bookmark name, or rename the bookmark.

   Bookmarks appear in the Bookmarks navigation pane when you open the exported PDF file in Adobe Reader or Acrobat.

   Note: You can use the Bookmarks panel menu to rename and delete bookmarks. Drag bookmarks in the panel to rearrange them. You can nest a list of bookmarks to show a relationship between topics. Nesting creates a parent/child relationship. You can expand and collapse this hierarchical list as desired. Changing the order or nesting order of bookmarks does not affect the appearance of your actual document.

   Next, you create a hyperlink that takes you to an external website destination.

10. Choose Window > Interactive > Hyperlinks.

    The Hyperlinks panel appears (**Figure 18**).

11. Select the text, frame, or graphic you want to be the hyperlink's source.

12. Do one of the following to create the hyperlink:

    - Click the Create New Hyperlink button in the Hyperlinks panel.
    - Choose New Hyperlink in the Hyperlinks panel menu.

    The New Hyperlink dialog box appears (**Figure 19**).

    Note: Use the Hyperlinks panel menu to edit, delete, reset, or locate hyperlinks.

13. Choose URL from the Link To menu.

14. In the URL text box, type or paste the destination URL for the hyperlink.

15. Specify appearance options, such as the following:

    Character Style Choose a character style to apply to the hyperlink source. The Character Style option is available only if the hyperlink source is selected text, not a selected frame or graphic.

    Type Select Visible Rectangle or Invisible Rectangle.

    Highlight Select Invert, Outline, Inset, or None. These options determine the appearance of the hyperlink when readers click it in the PDF file.

    Color Select a color for the visible hyperlink rectangle.

    Width Select Thin, Medium, or Thick to determine the thickness of the hyperlink rectangle.

    Style Select Solid or Dashed to determine the appearance of the hyperlink rectangle.

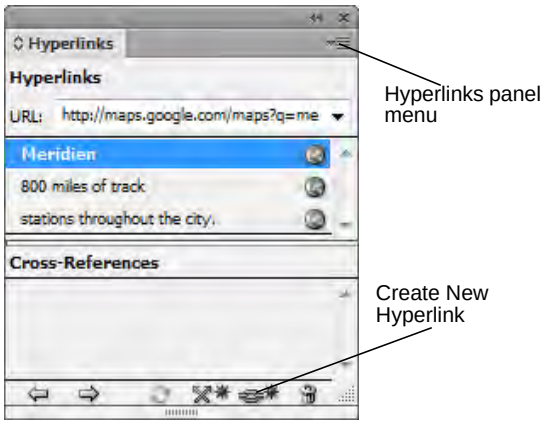

Figure 18 Hyperlinks panel

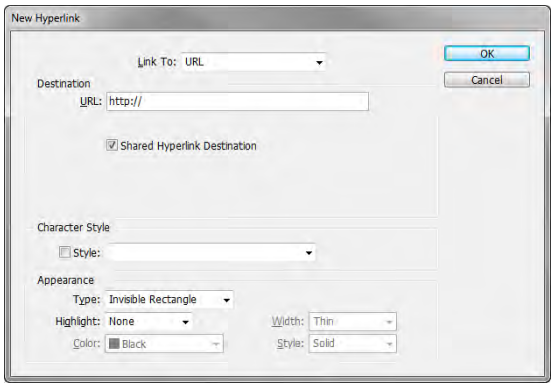

Figure 19 New Hyperlink dialog box

16. Click OK.

Note: If a URL hyperlink isn't working in the exported PDF, the problem may be that the hyperlink is a shared destination. Double-click the hyperlink in the Hyperlinks panel, choose URL from the Link To menu, deselect Shared Hyperlink Destination, and click OK.

17. Choose File > Export.

18. Specify a name and location for the file.

19. For Save As Type (Windows) or Format (Mac OS), choose Adobe PDF (Interactive).

20. Click Save.

The Export To Interactive PDF dialog box appears (**Figure 20**).

21. Select the Open In Full Screen Mode option to ensure the interactive PDF fills the entire screen when it opens.

22. Click OK.

The Generating PDF progress dialog box appears and the file is processed.

The file opens in your default application for PDF files.

Note: If you are asked whether you want to view the document in Full Screen mode, click Yes.

23. Click anywhere in the PDF document to advance to the next page.

24. Test the hyperlinks you created (**Figure 21**).

Note: If you receive a warning that the document is trying to connect to a website, click Allow.

25. Close Full Screen mode by pressing Ctrl+L (Windows) or Command+L (Mac OS) or Esc.

26. To display the navigation pane in Adobe Acrobat or Adobe Reader, do one of the following:

- Click any panel button on the left side of the work area to display that panel.
- Choose View > Show/Hide > Navigation Panes > Show Navigation Pane.

27. Test the bookmarks you created (**Figure 22**).

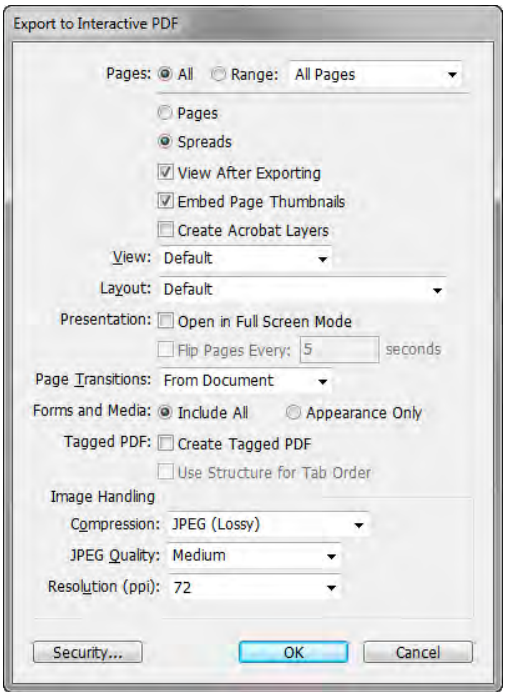

Figure 20 Export To Interactive PDF dialog box

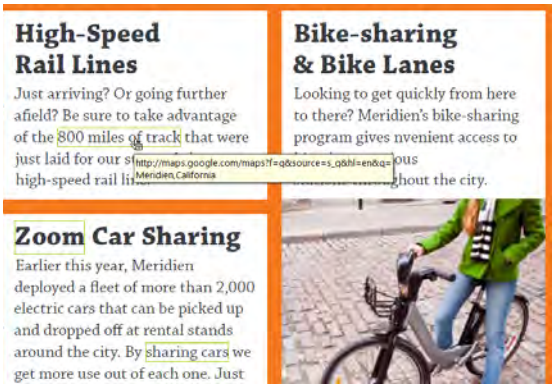

Figure 21 Testing hyperlinks in Acrobat

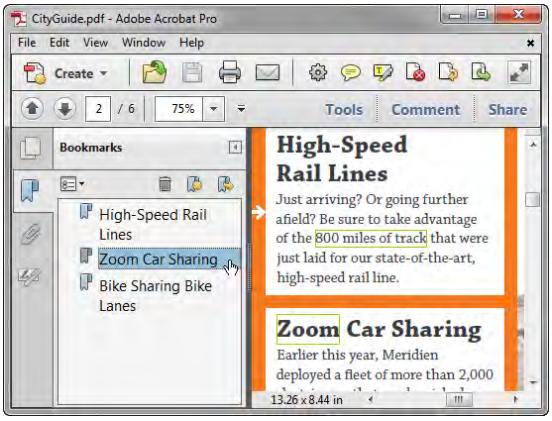

Figure 22 Bookmarks in the navigation pane in Acrobat

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