

VISUAL QUICKSTART GUIDE

DIGITAL EDITION



InDesign CS6



SANDEE COHEN

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VISUAL QUICKSTART GUIDE

InDesign CS6

FOR WINDOWS AND MACINTOSH

SANDEE COHEN

Visual QuickStart Guide
InDesign cs6

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Introduction

Welcome to the *InDesign CS6 Visual QuickStart Guide*, my ninth version of the book. From its humble start, InDesign is now the primary application for desktop publishing and page layout. I feel very lucky to have been working with and teaching InDesign since its very first beta. In fact, this is the only third-party book that has had editions for all versions of InDesign.

Using This Book

If you have used any of the other Visual QuickStart Guides, you will find this book to be similar. Each chapter is divided into different sections that deal with a specific topic — usually a set of tools or similar commands. For instance, the chapter on text has sections on creating text frames, typing text, selecting text, and so on.

Each of the sections contains numbered exercises that show you how to perform a specific technique. As you work through the steps, you gain an understanding of the technique or feature. The illustrations help you judge if you are following the steps correctly.

I've also sprinkled sidebars, printed in colored boxes, throughout the chapters. Some of these sidebars give you a bit of history or background for a specific feature. Other times, I've written out humorous stories about desktop publishing. These sidebars are the same little stories and anecdotes I tell my students in the classes I teach.

Strictly speaking, you don't have to work through the book in the same order as it is printed. If you want to learn more about imported images, you can skip right over to that chapter.

However, the book is organized in the same order that I run my InDesign beginner classes. We start with the document setup, then move to basic text, color, and so on. It's just as if you were sitting in one of my classes. The only thing you won't see is a lunch break.

Instructions

You will find it easier to use this book once you understand the terms I am using. This is especially important since some other computer books use terms differently. Therefore, here are the terms I use in the book and explanations of what they mean.

Click refers to pressing down and releasing the mouse button on the Macintosh, or the left mouse button on Windows. You must release the mouse button or it is not a click.

Press means to hold down the mouse button, or a keyboard key.

Press and drag means to hold the mouse button down and then move the mouse. I also use the shorthand term **drag**.

Menu Commands

InDesign has menu commands that you follow to open dialog boxes, change artwork, and initiate certain actions. These menu commands are listed in bold type. The typical direction to choose a menu command might be written as **Object > Arrange > Bring to Front**. This means that you should first choose the Object menu, then choose the Arrange submenu, and then choose the Bring to Front command.

Modifier Keys

Modifier keys are always listed with the Macintosh key first and then the Windows key second. So the instruction “Hold the Cmd/Ctrl key” means hold the Cmd key on the Macintosh platform or the Ctrl key on the Windows platform. When the key is the same on both computers, such as the Shift key, only one key is listed.

Keyboard Shortcuts

You’ll notice that I don’t usually provide the keyboard shortcut for commands. For instance, I’ll list the menu command for File > New, but not the keyboard shortcut Cmd/Ctrl-N.

While keyboard shortcuts help you work faster, you really don’t have to start using them right away. In fact, you will most likely learn more about InDesign by using the menus. As you look for one command, you may see another feature that you would like to explore.

So don’t worry about keyboard shortcuts as you start. Focus on the big picture.

My Thanks to:

Nancy Ruenzel, publisher of Peachpit Press.

Becky Morgan, my editor at Peachpit Press. Thanks for being so patient with me.

Becky Winter, for her eagle production eye and blazingly fast corrections.

The staff of Peachpit Press, all of whom make me proud to be a Peachpit author.

The **InDesign team** in Seattle, who has made InDesign my favorite program to use and to write about.

And a very special thanks to **David Lerner of Tekserve**, who has helped me keep my computers running in the middle of the book crunch. Tekserve (www.tekserve.com) is the best place to buy, fix, or enhance Macintosh computers.

Colophon

This book was created using InDesign CS5.5 running on a MacBook Pro and a Dell Vostro. Screen shots were taken using Snapz Pro X (Mac) and Snagit (Win). InDesign CS6 beta ran on the Macintosh OS X (Lion) and on Windows 7. Fonts are Myriad Pro from Adobe.

And Don’t Forget...

Whether you’re learning InDesign in a class or on your own, I hope this book helps you master the program.

Just don’t forget to have fun!

Sandee Cohen

(Sandee@vectorbabe.com)

June, 2012

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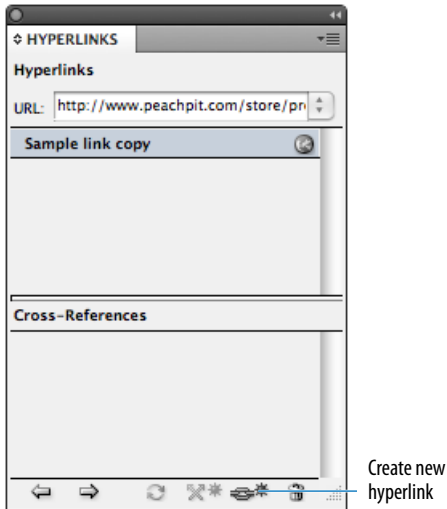
At the risk of sounding like an old codger, I can remember when a page-layout program only laid out print files. The idea of creating “push buttons” that sent you flying to other pages — or even other documents — was totally unfathomable. After all, how was someone supposed to press on a weather summary on the front page of a newspaper to jump to the full weather map on the last page?

So it is with some amazement that I write this chapter. Page layout no longer refers to just printed pages. InDesign has a wealth of features that let you create interactive elements for electronic documents.

Types of Interactive Elements

There are five types of interactive elements you can add to InDesign documents: Hyperlinks, Cross-References, Bookmarks, Buttons and Forms. Each has its own particular uses, but some of the features may overlap. Before you start work, decide which type of interactive element is right for you.

Feature	Description	Advantages	Limitations
Hyperlink	Adds a hotspot area to text or objects where you can click to move to other parts of the document, other documents, or Web pages.	Can be applied directly to the text inside a story. Hyperlinks can also be automatically applied to the entries in a table of contents or index using those InDesign features.	Provides only very primitive visual indications of the linked area.
Cross Reference	Adds a hotspot area to text that is linked to other parts of the document.	Also adds dynamic text that indicates the position of the cross-reference.	Provides only primitive visual indications of the linked area.
Bookmark	Adds a navigational element that is visible in the Bookmarks pane of Adobe Reader or Adobe Acrobat.	The Bookmark pane can be set to be visible at all times in the PDF document. Can be created automatically using the Table of Contents feature.	Requires some education to teach the reader how to use the Bookmarks pane in the Reader. Is not directly on the document page. No special visual indication in the document.
Button	Adds a hotspot area that can contain text or graphics. This hotspot can be set to invoke a wide variety of behaviors including navigation as well as movie or audio playback.	Offers the most navigational and design choices.	Buttons can't be created automatically from text or styles. Requires the most work to create.
Form	Adds an area that can be used in Acrobat to enter information or mark checkboxes or radio buttons.	These forms can be filled out in the PDF and the information then sent back to the creator for tabulation.	Forms can't be created automatically. Requires the most work to create.



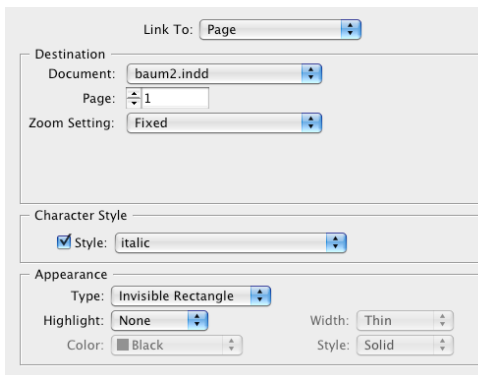
A The **Hyperlinks panel** is used to define both hyperlinks and cross-references.

Defining Hyperlinks

A hyperlink is an area of a page that can be clicked to send the reader to a new page, open a new document, move to a Web page, or send an email message. There are two parts to a hyperlink. The *source* is the object or text that you click to trigger the hyperlink. The *destination* is the page or Web link you go to.

To create a hyperlink:

1. If the Hyperlinks panel is not visible, choose **Window > Interactive > Hyperlinks** to open the panel **A**.
2. Select the text or object that you want to make the hyperlink source.
3. Click the Create New Hyperlink icon in the panel or choose New Hyperlink from the panel menu. This opens the New Hyperlink dialog box **B**.
4. Set the options for Link To, Destination, Character Style, and Appearance as described in the following exercises.



B The **New Hyperlink dialog box** lets you set the destination and appearance of a hyperlink.

There are several types of destinations for hyperlinks. You can, for instance, choose to link to a specific place in the document or you can link to a Web page. The type of link you choose determines the destination options that appear in the New Hyperlink dialog box.

To choose the type of link:

Use the Link To menu to choose one of the following types of links **A**:

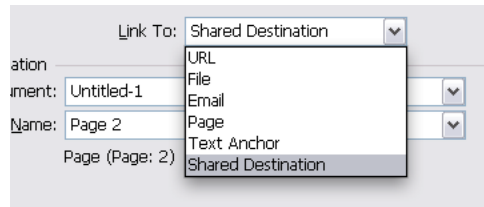
- **URL** creates a link to a Web page.
- **File** creates a link that opens a file in another application. Note: the file must be accessible to anyone choosing the link.
- **Email** creates a link that opens the default email application. You can also set the email address and subject line.
- **Page** creates a link that opens a new page in the document.
- **Text Anchor** creates a link to a point in the text that was defined as a text anchor.
- **Shared Destination** creates a link to a previously defined hyperlink. This is particularly helpful if you want several different hyperlinks to go to the same destination.

As you define hyperlinks, they appear in the Hyperlinks panel. Different types of hyperlinks display different icons.

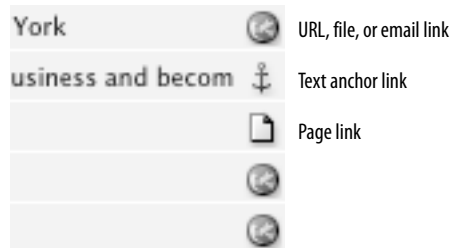
To see the types of hyperlinks in the Hyperlinks panel:

Click each hyperlink in the Hyperlinks panel. An icon next to the link shows the type of link **B**.

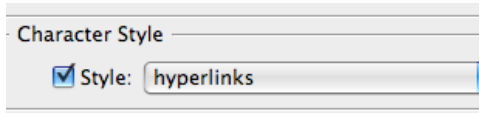
TIP A selected hyperlink also displays its URL or other link information in the Hyperlinks panel.



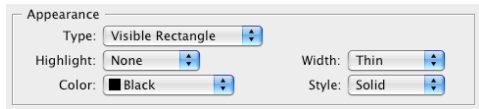
A The **Link To** menu lets you choose the type of destination for the hyperlink.



B The **icons for hyperlinks** in the Hyperlinks panel.



- C** Use the **Character Style** menu to apply a text style to a hyperlink.



- D** Use the **Appearance** settings to format the display of hyperlinks.

Character Styles for Hyperlinks

The Appearance settings for hyperlinks add rectangles around the hyperlink. But you may want your hyperlink to look more like the links on Web pages: blue text with a blue underline.

Once you have created a character style you can easily apply it as part of defining the hyperlink.

Of course all hyperlinks and other interactive elements also display the pointing finger symbol when you move the cursor over the link in the interactive document.

In addition to setting the destinations for hyperlinks, you can also control how the hyperlink appears on the page.

To set a character style to text hyperlinks:

1. Select the text that you want as a hyperlink.
2. In the New Hyperlink dialog box, click the Character Style menu **C**.
3. Choose a predefined character style. Or choose None to apply no style to the selected text. You can also create visual indicators around all hyperlinks. This is controlled using the Appearance settings **D**.

To set the appearance of a hyperlink:

1. Use the Type menu in the Appearance area to choose a setting for the visibility of the rectangle around the hotspot.
2. Use the Highlight menu to choose the appearance of the hotspot area when clicked.
3. Use the Width menu to choose the thickness of the visible rectangle.
4. Use the Style menu to choose a solid or dashed line for the visible rectangle.
5. Use the Color menu to choose a color for the rectangle.

The easiest way to create a hyperlink destination is to create it as you define the hyperlink. However, it's also possible to define destinations without defining the hyperlink. This is helpful if you have a lot of destinations that you want to define before you know where you will create the hyperlinks.

TIP Destinations don't appear in the Hyperlinks panel, but are available when you define new hyperlinks.

To create a page destination:

1. Choose New Hyperlink Destination in the Hyperlinks panel menu.
2. Choose Page from the Type menu. This sets the Page destination controls **A**.
3. Use the Page number control to set the page destination.
4. Enter a name for the page destination
or

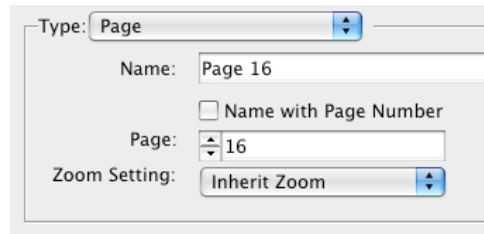
Click the option for Name with Page Number. This forces the destination name to the name of the page and the zoom setting.

5. Use the Zoom setting menu to set the magnification for the jump to that page.

You can set destinations for a URL. These are the links that are used to open Web pages.

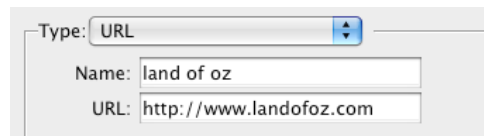
To create a URL destination:

1. Choose New Hyperlink Destination in the Hyperlinks panel menu to open the New Hyperlink Destination dialog box.
2. Choose URL from the Type menu **B**.
3. Enter a name for the destination.
4. Enter the URL information.



The screenshot shows the 'New Hyperlink Destination' dialog box with 'Page' selected in the 'Type' dropdown. The 'Name' field contains 'Page 16'. There is an unchecked checkbox for 'Name with Page Number'. The 'Page' field is a spinner control set to '16'. The 'Zoom Setting' dropdown is set to 'Inherit Zoom'.

A The New Hyperlink Destination dialog box set for a **Page** destination.



The screenshot shows the 'New Hyperlink Destination' dialog box with 'URL' selected in the 'Type' dropdown. The 'Name' field contains 'land of oz' and the 'URL' field contains 'http://www.landofoz.com'.

B The New Hyperlink Destination dialog box set for a **URL** destination.

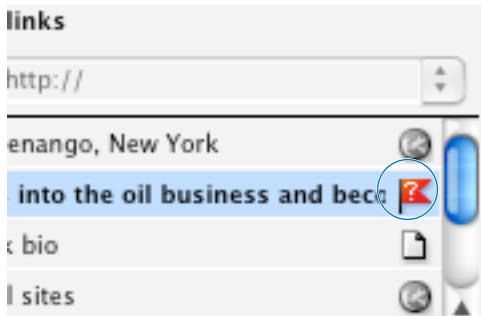
Tips for Hyperlinks

Hyperlinks don't have to be ordinary text or plain frames. You can use placed images, text inside tables, or even inline graphics as the source objects for hyperlinks.

If you use text as the source object for a hyperlink, you may not want to display the clunky rectangle as the link indicator. Instead, consider using an underline with colored text (applied as a character style) to indicate where the hyperlink is located. This changes the link so it is more similar to links in Web pages.



C The **Hyperlinks panel** contains controls for working with hyperlinks.



D The **missing destination icon** indicates that the hyperlink needs to be fixed.

Testing Hyperlinks

You can use the SWF Preview panel to test your hyperlinks without having to export the file. This option allows you to see the pointing finger as well as move to the destination.

As you work, you can edit the settings for the hyperlink source.

To edit hyperlinks:

1. Double-click the hyperlink entry in the Hyperlinks panel or choose Hyperlink Options in the Hyperlinks panel menu.
2. Make changes in the Hyperlink Options dialog box.

To delete a hyperlink:

1. Select the hyperlink you wish to delete.
2. Click the Delete icon in the Hyperlinks panel **C** or choose Delete Hyperlink/Cross-Reference from the Hyperlinks panel menu.

To move to a hyperlink:

1. Select the hyperlink in the Hyperlinks panel.
2. Choose Go to Source from the Hyperlinks panel menu or click the Go to Source icon in the Hyperlinks panel **C**.

To move to a hyperlink destination:

1. Select the hyperlink in the Hyperlinks panel.
2. Choose Go to Destination from the Hyperlinks panel menu or click the Go to Destination icon in the Hyperlinks panel **C**.

TIP If the destination is a URL, the default Web browser will be launched.

To fix a missing hyperlink:

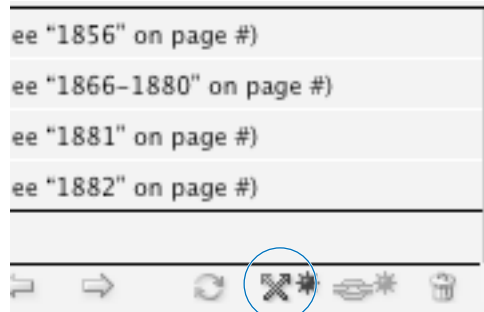
1. Select the hyperlink that displays the missing destination icon **D**.
2. Double-click the hyperlink to open the Edit Hyperlink dialog box.
3. Set the new destination for the hyperlink.

Creating Cross-References

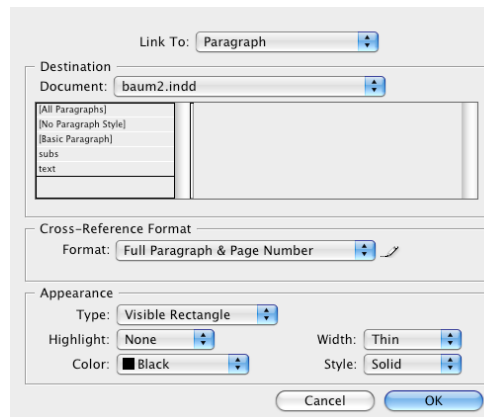
Cross-references are a subset of hyperlinks and are found at the bottom of the Hyperlinks panel. Like hyperlinks, cross-references create an electronic link from one part of a document to a destination in the same or different document. But cross-references go further than hyperlinks in that they also insert a reference to the page number or text. So you can automatically create a cross-reference on one page that says, "for more information see page ###."

To define a cross-reference:

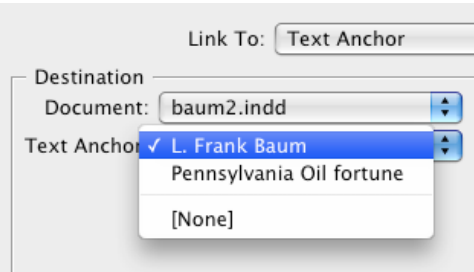
1. Place your insertion point in the text where you want the cross-reference to appear.
2. Click the Create New Cross-Reference icon **A** in the Hyperlinks panel. This opens the New Cross-Reference dialog box **B**.
3. Choose one of the following from the Link To menu:
 - **Text Anchor** sets the controls to a previously defined text anchor.
 - **Paragraph** sets the controls to text defined with a paragraph style.
4. Set the Text Anchor controls or set the Paragraph controls.
5. Use the Cross-Reference Format menu to control what text is placed inside the cross-reference.
6. Set the Appearance controls for the cross-reference.



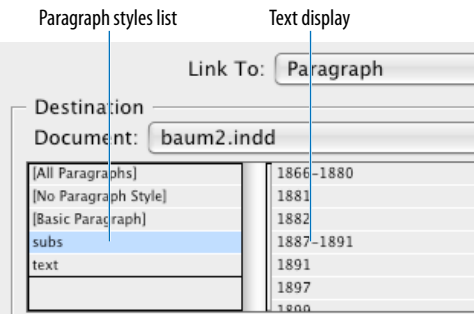
A The Create New Cross-Reference icon in the Hyperlinks panel.



B The New Cross-Reference dialog box.



C The New Cross-Reference dialog box set to link to a text anchor.



D The New Cross-Reference dialog box set to link to paragraph styles.

To set a text anchor as a cross-reference:

1. With the New Cross-Reference dialog box open, use the Link To menu to choose Text Anchor **C**.
2. Use the Document menu to choose the current document.
or
Choose the Browse command at the bottom of the Document menu to choose a different document.
3. Use the Text Anchor menu to choose a previously defined text anchor.

To set a paragraph style as a cross-reference:

1. With the New Cross-Reference dialog box open, use the Link To menu to choose Paragraph.
2. Use the Document menu to choose the current document.
or
Use the Browse command to choose a different document.
3. Click one of the paragraph styles from the paragraph options **D**.
4. Choose one of the paragraphs shown in the text display.

A cross-reference can be formatted to include the paragraph text, a page number, a file name, and other aspects of the text. You use the Cross-Reference Formats.

To set the cross-reference text:

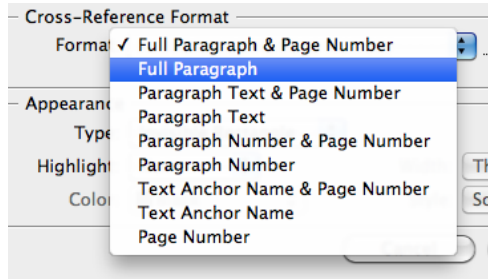
Choose one of the pre-made Cross-Reference Formats from the Format menu **A**.

TIP InDesign ships with these pre-made cross-reference formats already installed. So, for example, the format labeled “Page Number” will insert the cross-reference text “page #” into the text.

Cross-references are a type of hyperlink. So just like you can style hyperlinks, you can also format the appearances of cross-references.

To set the appearance of a cross-reference:

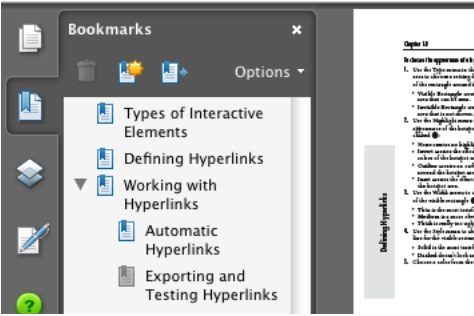
1. Use the Type menu in the Appearance area to choose a setting for the visibility of the rectangle around the hotspot **B**.
2. Use the Highlight menu to choose the appearance of the hotspot area when clicked.
3. Use the Width menu to choose the thickness of the visible rectangle.
4. Use the Style menu to choose a solid or dashed line for the visible rectangle.
5. Use the Color menu to choose a color for the rectangle.



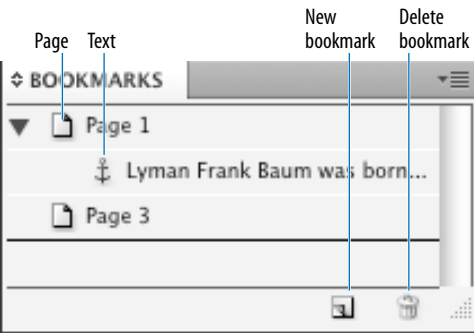
A The **Cross-Reference Format** menu lets you choose the pre-made building blocks that insert the text in a cross-reference.



B The **Appearance** controls for styling cross-references.



C The **Bookmarks** pane in Adobe Reader or Acrobat displays the bookmarks created in InDesign.



D The **Bookmarks** panel holds the bookmarks created for the document.

Working with Bookmarks

Bookmarks provide a different way to navigate within a document. Instead of elements on the page, bookmarks are displayed in the Acrobat or Reader Bookmarks pane **C**. The reader clicks each bookmark to move to that position in the document. One of the advantages to using bookmarks is that the Bookmarks pane can be always visible next to the area being read.

To create a bookmark:

1. Choose **Window > Interactive > Bookmarks** to open the Bookmarks panel **D**.
2. Do one of the following to create the destination for the bookmark:
 - Place the insertion point within the text. This creates a text bookmark.
 - Select the text. This creates a text bookmark named with the selected text.
 - Select a frame or graphic. This creates a page bookmark.
 - Double-click a page in the Pages panel. This creates a page bookmark.
3. Click the New Bookmark icon in the Bookmarks panel.

or

Choose New Bookmark from the Bookmarks panel menu. The bookmark is added to the Bookmarks panel.

TIP Icons show the difference between text and page bookmarks, although there are no such differences in Acrobat.

TIP If you already have bookmarks in the Bookmarks panel, the new bookmark is created directly under whichever bookmark is selected in the panel.

New bookmarks are created with the name *Bookmark 1*, *Bookmark 2*, and so on. You can rename the bookmark with a more descriptive name to help readers know what is located there.

To rename a bookmark:

1. Select the bookmark in the Bookmarks panel.
2. Choose Rename Bookmark from the Bookmarks panel menu. This opens the Rename Bookmark dialog box **A**.
3. Enter a new name in the field and click OK.

You can also rename a bookmark directly in the list area of the Bookmarks panel.

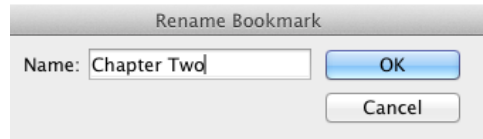
To rename a bookmark in the list area:

1. Click once to select the bookmark in the Bookmarks panel.
2. Click again to open the field that contains the bookmark name **B**.
3. Type the new name.
4. Press Return/Enter or click a different bookmark to apply the new name.

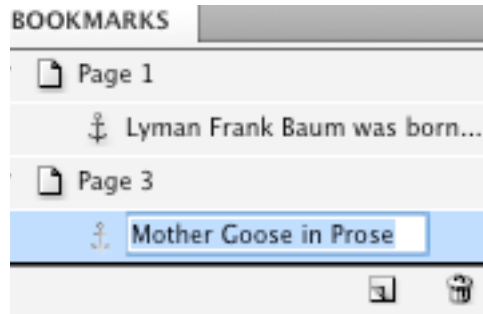
You can also delete bookmarks you no longer want in the document.

To delete a bookmark:

1. Select the bookmark in the Bookmarks panel.
2. Choose Delete Bookmark from the Bookmarks panel menu.
or
Click the Delete Bookmark icon in the Bookmarks panel.



- A** Use the **Rename Bookmark dialog box** to change the bookmark names.

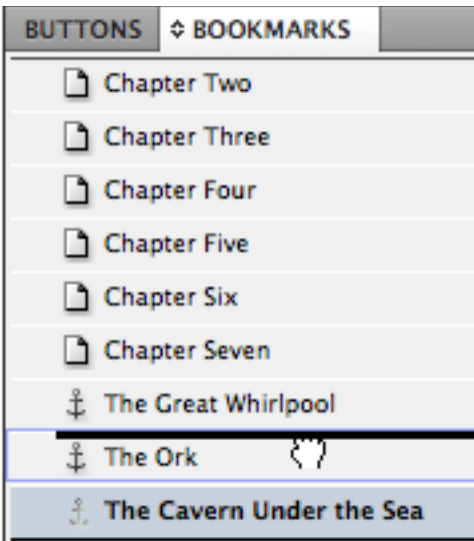


- B** Click the **bookmark name** to type a new name directly in the Bookmarks panel.

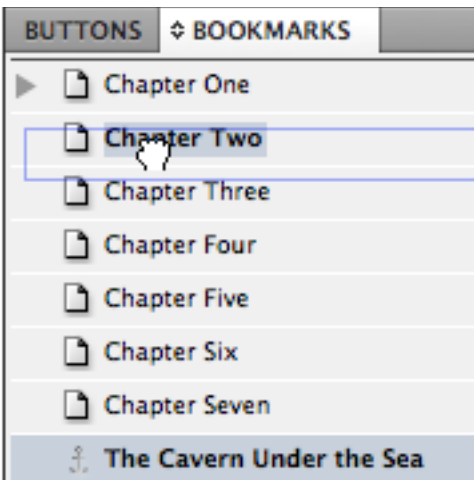
Loads of Bookmarks?

What if you want to quickly make lots of bookmarks? Rather than doing it manually, you can cheat by creating a table of contents using InDesign's Table of Contents command. As you create the TOC, InDesign can automatically create bookmarks for all the elements in the TOC.

While you do need to keep the TOC in the document in order to export the bookmarks into a PDF, the TOC doesn't have to stay visible. Put the TOC on a non-printing layer to keep the bookmarks in the exported PDF.



C Drag a bookmark **between two bookmarks** to put it in a new position in the panel.



D Drag the bookmark **onto the name** to nest it under another bookmark.

Bookmarks don't have to appear in the order that you create them. You can move important bookmarks up to the top of the list, even if they refer to pages that are at the end of your document.

To move bookmarks to new positions:

1. Drag the bookmark up or down the list to the new position.
2. When you see a black line appear, release the mouse button. The bookmark moves to the new position **C**.

TIP Use the Sort Bookmarks command in the Bookmarks panel menu to rearrange the bookmarks into the order they occur in the document.

You can also *nest*, or move bookmarks so they are contained within others. The top bookmark is called the *parent*; the nested bookmark is called the *child*.

To nest bookmarks:

1. Drag the bookmark you want to nest onto the name of the parent bookmark.
2. When the name is highlighted, release the mouse button **D**. The child bookmark is indented under the parent. A triangle controller appears that lets you open or close the parent bookmark.

TIP When you delete a bookmark, you also delete any bookmarks that are nested within that bookmark.

TIP You can continue to nest bookmarks through as many levels as you want.

To unnest bookmarks:

1. Drag the child bookmark out from the parent so that the black line is no longer indented below the parent bookmark **D**.
2. Release the mouse button. The child bookmark is no longer nested.

Adding Sounds

Despite the mind-bending concept of adding sound to a page layout, it's actually very simple to add sounds to an InDesign document. My favorite use for sounds is to add click effects that play when a button is pushed. I also might add short bits of music that play when a document is first opened.

If you know how to place an image into InDesign, you already know how to place a sound in a document.

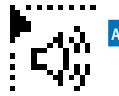
To add a sound to a document:

1. Choose **File > Place**, and then choose the sound file you want to import. The cursor changes into the Sound Clip cursor **A**.

TIP You can also click the **Place a Video or Audio File** button at the bottom of the **Media** panel to place a sound file.

2. Click or drag the Sound Clip cursor to add the sound clip to the document.

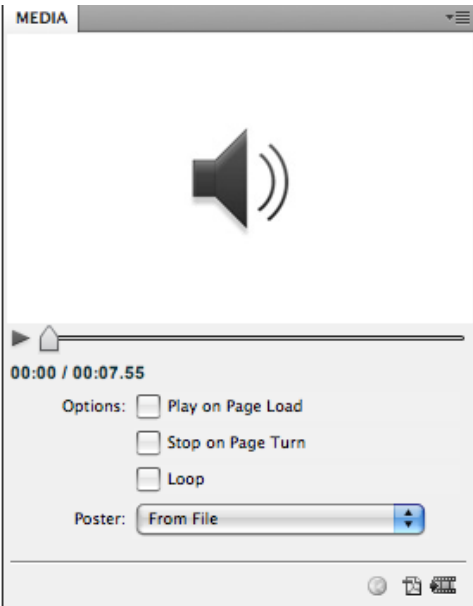
TIP The sound clip contains a special icon within its frame that identifies it as a sound item **B**. This icon and stripes within the frame take their color from the layers panel they are on.



The **Sound Clip cursor** indicates the loaded cursor contains a sound clip.



The **sound icon inside a frame** indicates the frame contains a sound.



c The Media panel for a selected sound clip.

Once you have the sound on the page, you use the Media panel to modify and set the options for how the sound plays.

To open the Media panel:

Choose **Window > Interactive > Media**. The Media panel appears **c**.

TIP The Media panel controls are unavailable until a media file is selected.

To set the sound options:

1. Select **Play on Page Load** to have the sound automatically play when the page is visible.
2. Select **Stop on Page Turn** to have the sound automatically stop when the page is no longer visible.
3. Select **Loop** to have the sound repeat until manually stopped.

TIP Without this option selected, the sound will continue until it finishes its run time.

The Media panel also lets you play the sound from start to finish or select specific portions of the sound.

To play a sound using the Media panel:

1. Select the sound. The media panel shows the controls and poster image for the sound **A**.
2. Click the Play button to hear the sound. The play head moves along the sound play line to show how far into the sound length the sound has played.
3. As the sound plays, the Play button is replaced by a Stop button. Click the Stop button to stop the playback.

TIP The two time indicators show how far along the playback is and the total length of time that the sound plays.

TIP You can also use the SWF Preview panel to hear sounds.

If a sound file is going to be used in a PDF document, there are some additional controls you can set.

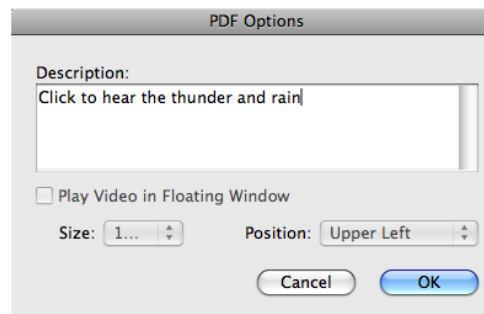
To set the PDF sound options:

1. Click the Export Interactive PDF icon on the Media panel or choose PDF Options from the Media panel menu. This opens the PDF Options dialog box **B**.
2. Enter the text that will be used as a tool tip for the sound clip. This lets sight-impaired users hear a description of what the sound contains so they can choose to activate the sound.

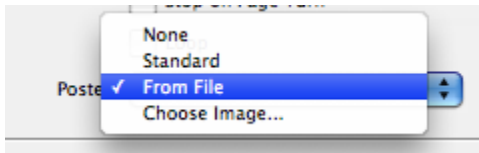
TIP The rest of the options are for video files and are not available for sound clips.



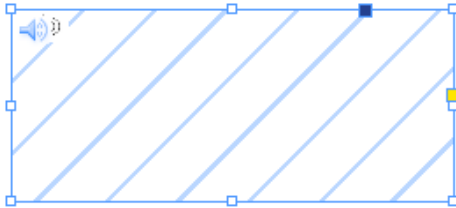
A Use the **Media panel** to listen to a sound and control how it plays in the exported document.



B The **PDF Options dialog box** for items that are exported to interactive PDF files.



C The **Poster options menu** for a placed sound clip.



D A sound with **no poster image**.



E The **standard sound poster image**.



F A sound with a **custom poster image**.

When a sound is included on a page, it acts like a button that can play the sound when clicked. Therefore you might want to include a *poster*, or visual indicator, that lets people know that there is a sound on the page.

To set the sound poster:

Use the Poster menu to choose an image that will be used to show where the sound is in the document **C**:

- **None** leaves the sound clip frame empty **D**.
- **Standard** uses the standard sound poster image **E**.
- **From File/Choose Image** lets you import a custom image to use as the sound poster **F**. Use the Choose button to choose the custom image.

TIP The standard sound icon is actually the image *StandardSoundPoster* stored in the Presets > Multimedia folder in the InDesign application folder. You can open this file and make changes to it. This will then become your standard sound file poster.

Movies and Animations

One of the more exciting multimedia features is the ability to add movies to your electronic documents.

To add a video to a document:

1. Choose **File > Place** and then choose the movie file you want to import. The cursor changes into the Video Clip cursor **A**.
2. Click or drag to place the video on the document. This adds a video object to the document. Video objects are identified by the Video Clip icon **B**.

TIP You can also click the Place a Video or Audio File button at the bottom of the Media panel to place a video file.

Once you have the video on the page, you use the Media panel to modify and set the options for how the video plays.

To open the Media panel:

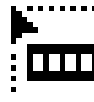
Choose **Window > Interactive > Media**. The Media panel appears **C**.

TIP The Media panel controls are unavailable until a media file is selected.

To set the video options in the Media panel:

1. Select Play on Page Load to have the video automatically play when the page is visible.
2. Select Loop (SWF export only) to have the video repeat until manually stopped. This option will not apply if the file is exported as a PDF.

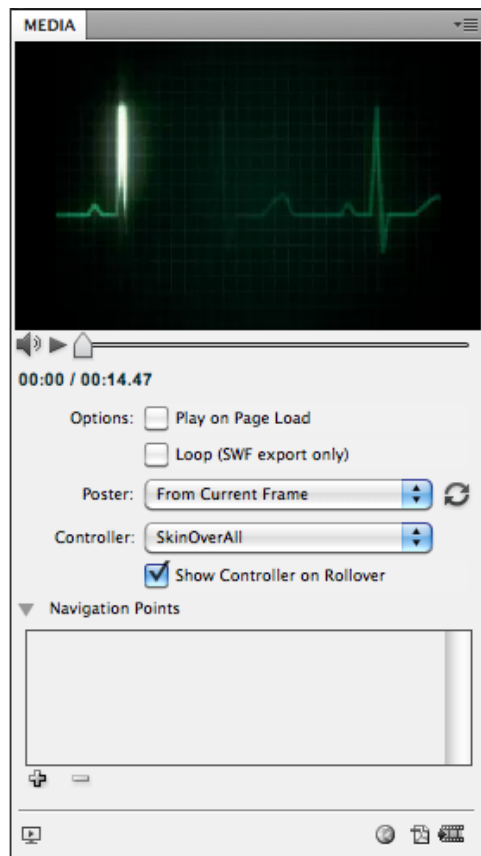
TIP If you need a video to loop, but are exporting as a PDF, you can apply a loop setting in the program, such as Adobe Premiere, that creates the video.



A The loaded cursor for video clips.



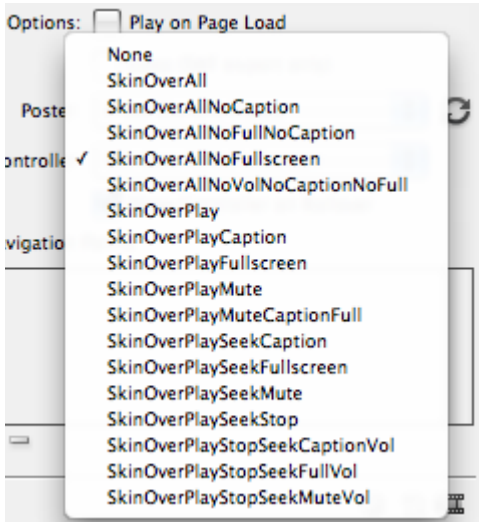
B The Video Clip icon inside a frame.



C The Media panel controls for a selected video.



D The **standard movie poster image**.



E Use the **Controller menu** to choose which controller features you want for a movie.



F The **SkinOverAll controller** contains all the controller features for placed movies.

Like sound files you can set poster options for movies. However, since they are movies, they have more options than sounds.

To set the movie poster options:

1. Use the Poster menu to choose an image that will be used to show where the movie is in the document **D**:
 - **None** leaves the frame empty.
 - **Standard** uses the standard video file icon.
 - **From Current Frame** uses the frame currently displayed in the Media Panel.
 - **Choose Image** lets you import a custom image to use as the movie poster.
2. Use the Controller menu to apply a controller that can be used to control the playback of the movie as well as play it in full screen and show captions **E**.

TIP The name of each controller explains which features it has. For instance, **SkinOverAll** contains all the features **F**. **SkinOverPlay** contains only the Play button.

3. Select Show Controller on Rollover to have the controller appear and disappear when the mouse moves inside and outside the area of the video.

TIP When Show Controller on Rollover is not selected, the controller appears throughout the video playback.

The Media panel also lets you play a movie from start to finish or move to specific portions of the movie **A**.

To play a movie using the Media panel:

1. Click the Play button to play the movie within the preview area of the Media panel **A**.
2. As the movie plays, the Play button is replaced by a Pause button. Click the Pause button to stop the playback.
3. Click the Sound button to mute the sound during the playback **A**.

TIP The two time indicators show how far along the playback is and the total length of time that the movie plays.

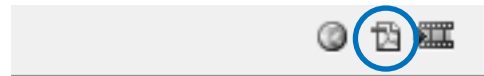
If a movie file is going to be used in a PDF document, there are some additional controls you can set.

To set the options for a video in a PDF document:

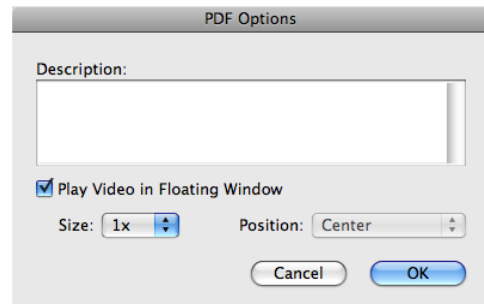
1. Click the Export Interactive PDF icon on the Media panel **B** or choose PDF Options from the Media panel menu. This opens the PDF Options dialog box **C**.
2. In the Description field, enter the text that will be used as a tool tip for the video clip. This lets sight-impaired users hear a description of what the video contains.
3. Click Play Video in Floating Window to have the video display in a separate window above the PDF file.
4. If you have the video play in a floating window, you can set a size for the display. Use the Size list to choose a size for the video.



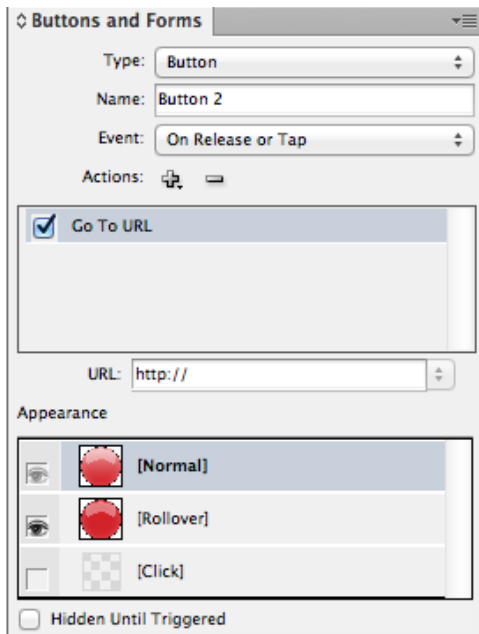
A Use the Media panel video controls to control the playback of a movie file.



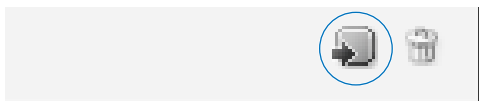
B The Export Interactive PDF icon in the Media panel.



C The additional PDF Options dialog box for videos to be played in PDF files.



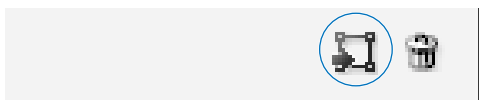
D The Buttons and Forms panel for a selected button.



E The **Convert Object to Button** icon at the bottom of the Buttons and Forms panel.



F The **Button** icon appears inside an object that has been converted into a button.



G The **Convert Button to Object** icon at the bottom of the Buttons and Forms panel.

Creating Buttons

Buttons are more powerful than simple hyperlinks. Buttons contain the code that can send you to destinations, flip pages, open Web pages, play movies, show and hide other buttons, and other tricks.

You use the Buttons and Forms panel to create and apply actions to Buttons.

To view the Buttons and Forms panel:

Choose **Window > Interactive > Buttons and Forms** to open the Buttons and Forms panel **D**.

To create and name a button:

1. Select an object. Any object, except media files, can be used as a button.
2. Choose **Object > Interactive > Convert to Button** or click the Convert Object to Button icon in the Buttons and Forms panel **E**. The object displays the button icon **F**.
3. Use the Name field in the Buttons and Forms panel to change the default name to something more descriptive.

TIP I usually name my buttons with their function. So, for example, buttons that move to the previous page and the next page are labeled *Previous Page* and *Next Page*.

TIP When a button is selected, the Buttons and Forms panel displays all the interactive options for the button.

If you need to, you can remove the button properties from an object.

To remove the button properties:

1. Select the button object.
2. Choose **Object > Interactive > Convert to Object** or click the Convert Button to Object icon in the Buttons and Forms panel **G**.

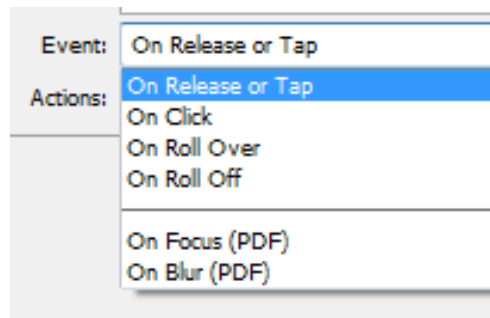
A button without an action is like a light switch that's not connected to a lamp. You can click the button all you want, but nothing's going to happen. There are two parts to setting actions. First you choose the type of event that will prompt the action.

To choose the event for a button action:

Use the Event menu to choose what type of mouse or keyboard action should prompt the button to perform the action [A](#).

- **On Release or Tap** applies an action under two circumstances: when the mouse button is released after a click or when a tablet screen is tapped.
- **On Click** applies an action as the mouse button is pressed down.
- **On Roll Over** applies an action when the mouse cursor is moved over the button's bounding box.
- **On Roll Off** applies an action when the mouse cursor is moved away from the button's bounding box.
- **On Focus (PDF)** applies an action when the button is prompted by the Tab key. This event only works for buttons in PDF documents.
- **On Blur (PDF)** applies an action when the Tab key takes the focus off the button. This event only works for buttons in PDF documents.

TIP You can set multiple events for a button. For example, a button can play a sound when the mouse rolls over the button but open a Web page when the same button is clicked.

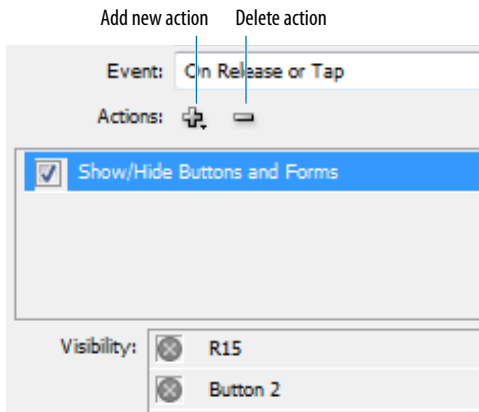


A Use the **Event list** to choose which mouse actions will prompt a button action.

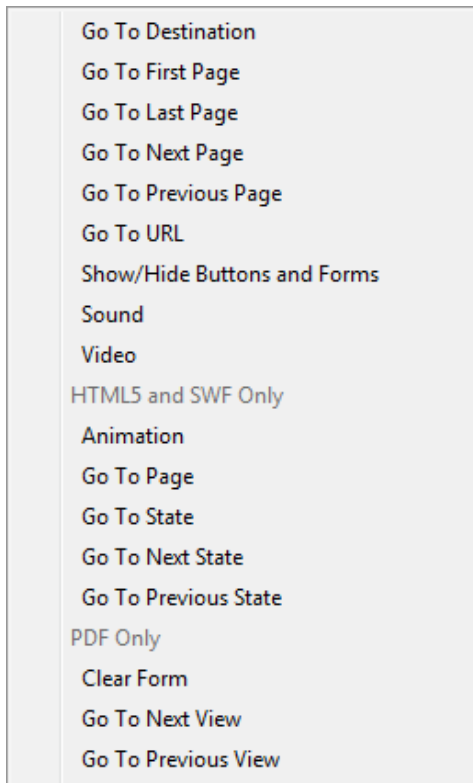
A Button Trick

My favorite use for buttons is to use the On Roll Over and On Roll Off events to show and hide other buttons.

Usually I set the button to show the image on roll over and then hide it on roll off. Or I show the image on the mouse click and hide it on the mouse release.



B The **Actions** area displays the actions for each mouse event.



C The **Actions** menu in the Buttons and Forms panel.

Once you have chosen the mouse event, you then choose the action that follows the event.

To choose the action for a button event:

1. Click the Add New Action icon from the Actions area of the Buttons and Forms panel **B**. This displays the Actions menu **C**.
2. Choose the action that you want to apply. The action appears in the Actions area of the Buttons and Forms panel.
3. Depending on the action, additional controls may appear in the Buttons and Forms panel. Set those controls as necessary.
4. If desired, you can apply more actions to the button by repeating steps 1–3.

To delete the action for a button event:

1. Select the action in the Actions area.
2. Click the Delete Action icon.

TIP Instead of deleting an action, you can disable it by clicking its check mark. This keeps the action available, but it does not export with the button.

If you have multiple actions for an event, the actions are applied in the order that they appear in the list. You can change this order of how the actions are applied.

To change the position of an action:

Drag the action up or down in the Actions list.

TIP The order that the actions appear can be important when playing sounds and movies. For instance, you might want the action for a click sound to play before the action to play a movie.

One of the benefits to working with buttons is the ability to change the appearance so that the button itself responds to the actions of the user. When you create a button, it only has one appearance called the Normal state. You need to create new appearances for the Rollover and Click button states.

To set the appearances of a button:

1. Select the button. Unless you have already modified it, only the [Normal] state is active in the Buttons and Forms panel [A](#).

TIP The [Normal] state displays the appearance of the button when the mouse is not near it.

2. Click the [Rollover] state listing in the Buttons and Forms panel. This activates the state.

TIP The Rollover state displays the appearance of the button when the mouse cursor enters the button area.

3. Click the [Click] state listing in the Buttons and Forms panel. This activates the state.

TIP The [Click] state displays the appearance of the button when the mouse presses down on the button.

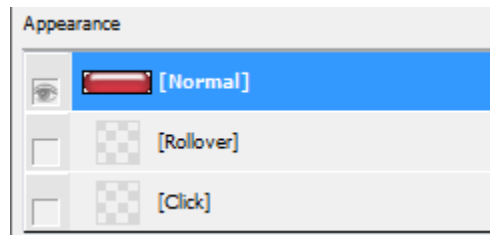
To make changes to each appearance state:

1. Select the button you want to modify.
2. In the Buttons and Forms panel, select the state that you want to modify.
3. Use any of InDesign's styling features to add a fill, stroke, or effect to the object. Use the Type tool to insert text as a label. You can also insert different images for each state.

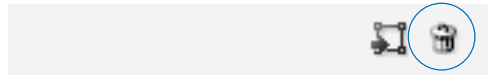
To delete button states:

1. Select the state you want to delete.
2. Click the Delete State icon [B](#).

TIP You cannot delete the [Normal] state.



A The States in the Buttons and Forms panel.



B The Delete State icon in the Buttons and Forms panel.



c A portion of the **sample buttons** in the Sample Buttons And Forms library.

Instead of deleting states, which tosses out their content, it may be better to change whether or not the state is exported.

To change the visibility of a state:

Click the eyeball next to the name of the state. If the eyeball is visible, it means the state is enabled and will export. If the eyeball is not visible, it means the state is disabled and will not export.

Sample Buttons

In addition to creating your own buttons, Adobe has generously provided a library of pre-made buttons that already have rollover states as well as actions to go to pages and Web addresses.

TIP The Sample Buttons And Forms library also contains forms objects which can be used to create interactive PDF forms. (See “Creating PDF Forms” on page 428.)

To access the Sample Buttons And Forms library:

Choose Sample Buttons And Forms from the Buttons and Forms panel menu. The library appears **c**.

Once you have the sample buttons visible, you can easily add buttons to a document.

To place buttons from the Sample Buttons And Forms library:

Drag the buttons onto your document page. Or, select the buttons in the library and choose Place Item(s) from the panel menu.

TIP The sample buttons can be customized with new states, actions, and events like any other button.

Creating PDF Forms

Most likely you've gotten a PDF where you click inside the areas of the form and fill it out with the information requested. InDesign lets you add form fields to your documents so you can create these interactive PDF files without having to open Acrobat.

You use the Buttons and Forms panel to create forms.

To view the Buttons and Forms panel:

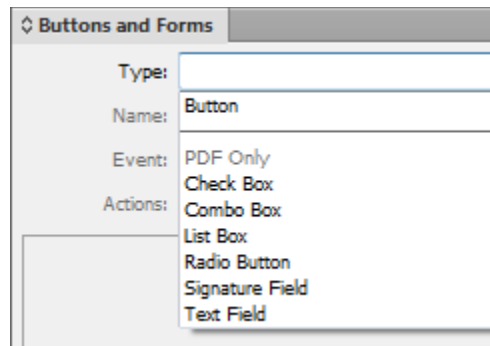
Choose **Window > Interactive > Buttons and Forms** to open the Buttons and Forms panel.

To create and name a form:

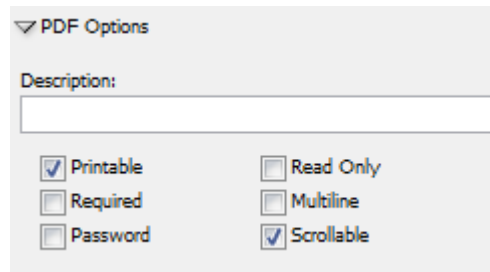
1. Select an object. Any object, except media files, can be used as a form.
2. Choose **Object > Interactive > Convert to [form name]** or choose one of the types of forms from the Type menu in the Buttons and Forms panel **A**. The form icon appears in the object.

TIP The form icons change depending on the type of form chosen.

3. Use the Name field in the Buttons and Forms panel to change the default name to something more descriptive.
4. Leave the Event menu as On Release or Tap.
5. Use the Action controls to apply actions as described on page 425.
6. If you have chosen a check box or radio button, style the Appearance states as described on page 426.
7. Fill in the PDF options **B** as described in the next exercise.



A The **Type** field for forms in the Buttons and Forms panel.



B The **PDF Options** for form objects. Not all forms contain all these PDF options.

Description:

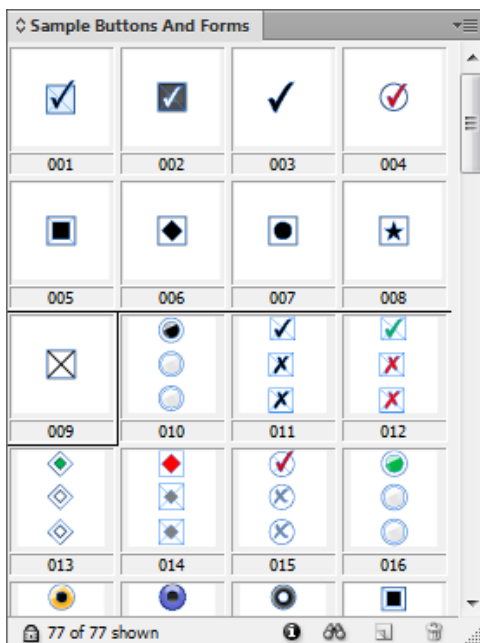
C The **Description field** is used to enter a tool-tip of the field for sight-impaired users.

List Items

- Good Witch
- Scarecrow

Font Size:

D The List Items area displays items that will be used in List Box and Combo Box menus.



E A portion of the **sample forms** in the Sample Buttons And Forms library.

To set the options for a PDF form:

1. Fill in the Description field with the text that will be used as a tool tip for the form field **C**. This lets sight-impaired users hear a description of what the form field does.
2. Check the options as follows:
 - **Printable** allows the field to be printed.
 - **Required** means the form can not be submitted unless that field is filled.
 - **Password** hides the field's content as a series of asterisks.
 - **Read Only** prevents the contents of the field from being modified.
 - **Multiline** allows text to wrap to multiple lines.
 - **Scrollable** applies scroll bars if the contents exceed the depth of the field.
 - **Selected by default** applies the selection when the form is first opened.
 - **Sort Items** arranges the list items alphabetically or numerically.

TIP Some forms contain different options than others.

3. If you have chosen List Box or Combo Box, use the List Items controls to select the menu items for the form **D**.
4. If you have chosen List Box or Combo Box, set the Font Size for the menu items.

Sample Forms

Like the sample buttons, you can use the Sample Buttons And Forms library to drag out pre-made forms **E**. See page 427 for how to access the library for the sample forms.

TIP The sample forms consist primarily of radio buttons and check boxes with one set of combo boxes for the numbers 1–12 and 1–31.

Animating InDesign Objects

Instead of having to go to Flash or some other animation program, I can animate the items on the InDesign page and export the result as a SWF video. This section will show you the controls that let you create this type of animation.

The primary controls for working with animated objects require the use of the Animation panel.

To open the Animation panel:

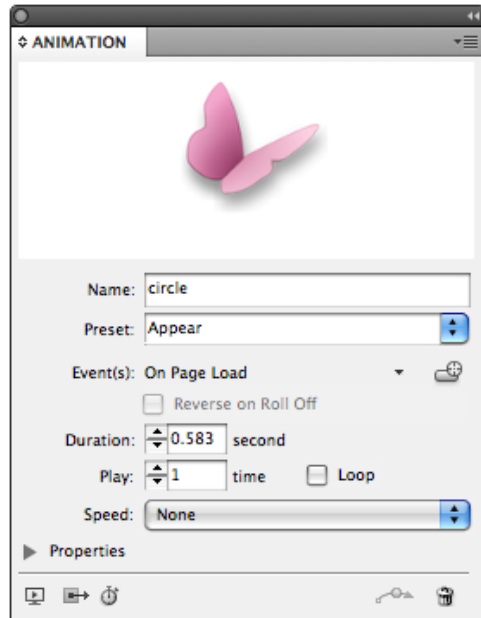
Choose **Window > Interactive > Animation**. The Animation panel appears **A**.

To add animation to an object:

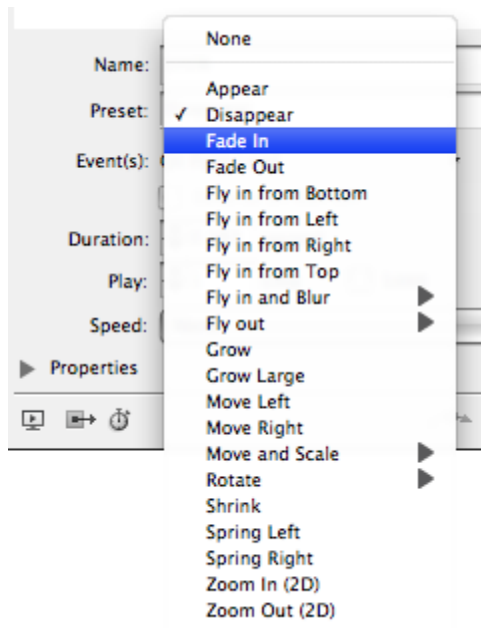
1. With the object selected, choose one of the motion presets from the Preset list **B**. This applies an animation to the object as indicated by the Animation icon.

TIP The butterfly image in the Animation panel displays a preview of the action of the animation.

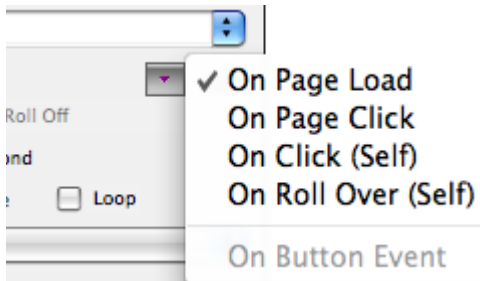
2. If desired, use the Name field to change the generic name of the object into something more descriptive. This is especially helpful if you have many animated objects on the spread.



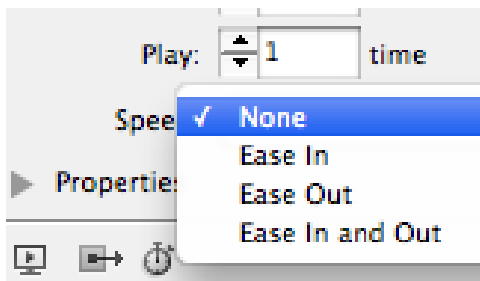
A The Animation panel contains the controls for applying motion to objects on a page.



B The Animation Preset menu contains the preset motions and effects you can apply to objects.



C Use the Event(s) menu to set what **mouse or page actions trigger the animation.**



D Use the Speed menu to set **choose how the motion accelerates or decelerates.**

To set the events that prompt the animation:

Use the Event(s) list to choose what mouse or page actions trigger the animation **C**:

- **On Page Load** starts the animation when the page is visible.
- **On Page Click** starts the animation when the mouse clicks anywhere on the page.
- **On Click (Self)** starts the animation when the object is clicked.
- **On Roll Over (Self)** starts the animation when the mouse moves over the area of the object.

TIP If you choose **On Roll Over (Self)**, you can select **Reverse on Roll Off** to play the animation backwards when the mouse moves away from the object.

TIP The menu item for **On Button Event** is applied by using the **Create Button Trigger** icon or by setting a button action in the **Buttons** panel.

To set the timing and speed settings:

1. Use the **Duration** field to choose for how long (in seconds) the animation plays.
2. Use the **Play** field to choose how many times the animation repeats. Select **Loop** to have the animation repeat endlessly.
3. Use the **Speed** list to choose how the motion accelerates or decelerates **D**.
 - **None** keeps a constant speed throughout the animation.
 - **Ease In** starts slowly and speeds up.
 - **Ease Out** starts at a constant speed and slows down at the end.
 - **Ease In and Out** starts slowly, remains constant for a while, and then slows down.

The InDesign team figured (rightly) that people would want to quickly make buttons that can play animated objects.

To create a button to control an animated object:

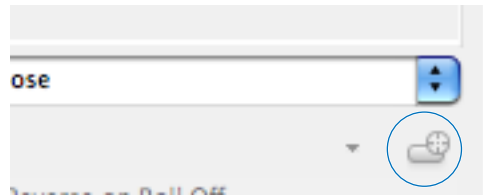
1. Select the animated object.
2. Click the Create button trigger icon in the Animation panel **A**.
3. Click the object that you want to act as a button to play the animation. The object is converted into a button (if necessary) and the controls to play the animation are applied.

TIP You can then make any modifications to the button in the Buttons panel.

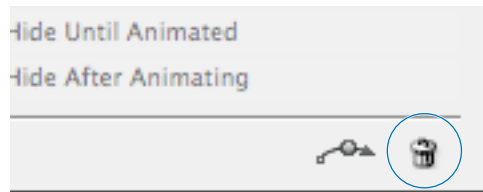
If you no longer want an object to be animated, you can convert it back into an ordinary object.

To remove the animation applied to an object:

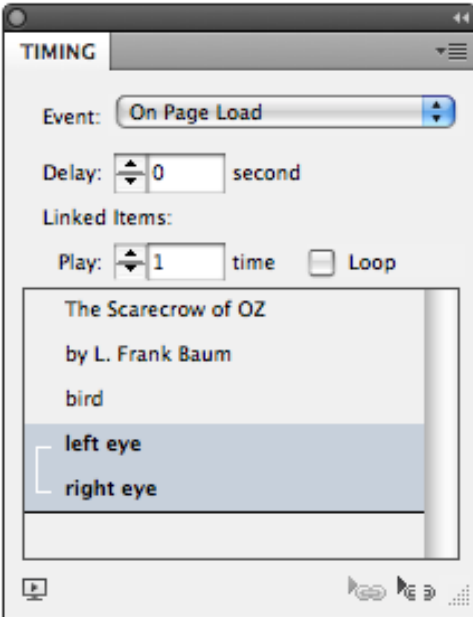
1. Select the animated object.
2. Click the Remove Animation icon in the Animation panel **B**.



A Use the **Create Button Trigger icon** to quickly set a button to prompt an animated object.



B Click the **Remove animation icon** to delete any animations applied to an object.



c The **Timing panel** contains the timing controls for all the animations on a spread.

Timing

Just as in comedy, when working with animation timing is everything. So in addition to the duration controls in the Animation panel, the Timing panel gives you additional control over how an animation plays. There are two main features for what the Timing panel does. The first allows you to set a delay for when animated objects start their animation.

To set the delay for animated objects:

1. Open the Timing panel (**Window > Interactive > Timing**). All the animated objects for that spread are listed in the Timing panel area **c**.

TIP You don't add items to the Timing panel. They appear automatically when you create animated objects.

2. In the Timing panel, not on the page itself, click the name of the object you want to control.
3. If you have applied an event to control the animated object, use the Event list to choose the event that triggers the object.
4. Use the Delay field to set the amount (in seconds) that the object's animation will be delayed.

The Timing panel also lets you control the order that objects are animated.

To change the order that objects are animated:

Drag the name of the object up or down in the list in the Timing panel. Objects are played from the top of the list down.

Each object in the Timing panel plays individually. However, you can link objects so they play at the same time.

To set objects to animate together:

1. Select the names of the objects in the Timing panel.
2. Click the Play Together icon in the Timing panel. A bracket appears around the selected items indicating they will play together.
3. If you have items linked to play together, you can use the Play field and Loop control to control how many times they play.

TIP Click the Play Separately icon to release the items from playing together.

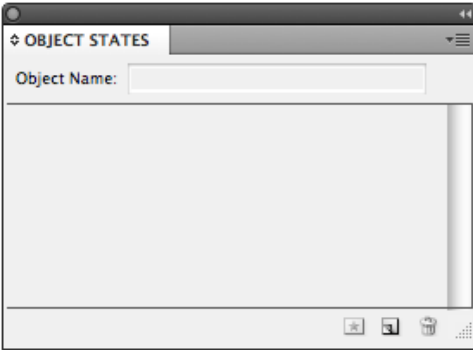
Timing Is Everything!

Even the slightest change in timing can make an enormous difference in the effectiveness of an animation. While I can't anticipate every timing situation, here are some general rules I try to follow.

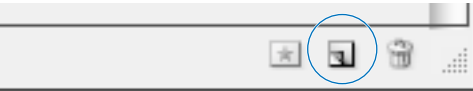
Take a moment. When items are set to play on the loading of a page, you may want to set a slight delay before they play. This gives your viewers a moment to get accustomed to the setting.

Keep the pacing up. Nothing is more boring than elements that move too slowly on the page. This means that the speed of the animation as set in the Animation panel as well as the Timing panel should be short. Your audience can anticipate where an object is moving. So don't bore them by making them watch it happen.

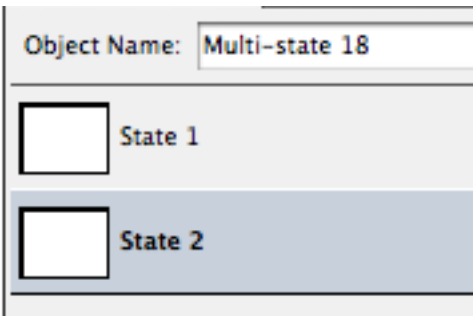
Don't loop unless you mean it. Setting something to endlessly play on a page is distracting. But that doesn't mean you can't loop objects such as wheels on a car that moves across a page. The wheels should loop in that situation.



A The **Object States** panel with no states visible.



B The **New State** button in the Object States panel.



C The **Object States** panel with two states applied to an object.

Multi-State Objects

Instead of cluttering up my bookshelf with hundreds of pictures of my family, friends, and pets, I have an electronic screen that displays all my pictures in a single picture frame. That's what a multi-state object is like. A regular InDesign frame displays only a single image or text content. But multi-state objects are special frames that can display more than one image or text content. You can then cycle through the multi-state object in a presentation to show many different items.

TIP Multi-state objects don't work when exported to PDF documents.

To create a multi-state object:

1. Choose **Window > Interactive > Object States**. This opens the Object States panel **A**.
2. Select the object that you want to convert into a multi-state object.
3. Click the New State button **B**. This adds a multi-state name to the object and adds a second state to the object.

TIP Multi-state objects are identified by the Multi-state Object icon.

To change the name of the multi-state object:

1. Double-click the name in the Object Name field.
2. Type a new name.
3. Press Return to apply the new name.

To add states to a multi-state object:

1. Click the New State button.
2. Repeat to add as many new states as you want **C**.

Adding and modifying multi-states one at a time takes too much time. What you want to do is select a whole bunch of objects and convert them into a multi-state object.

To create a multi-state object from existing frames:

1. Select all the objects that you want to use in the multi-state object **A**.
2. Click the New State button in the Object States panel. This converts each object into a new state within a multi-state object.

TIP Hold the Opt/Alt key to convert all the objects into a single state of the multi-state object.

TIP The objects appear in the multi-states in the same stacking order that they were on the page.

Once you have a multi-state object, you can modify the object as a whole or change the contents of a particular state.

To modify the content of a state:

1. Select the multi-state object with the Selection tool.
2. Double-click the name of the state that you want to modify. This selects the state.
3. Switch to the Direct Selection tool. The icon changes to indicate the content of the state has been selected **B**.

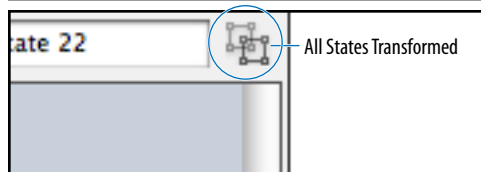
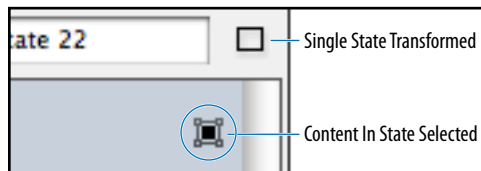
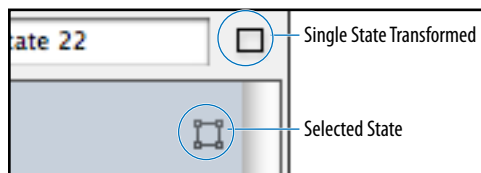
4. Make whatever changes you want to the content of the multi-state.

TIP Click with the Direct Selection tool to select the last active state in the object in the content mode.

5. Click the Paste Copied Content icon in the Object States panel **C**. The pasted content is added to the state.



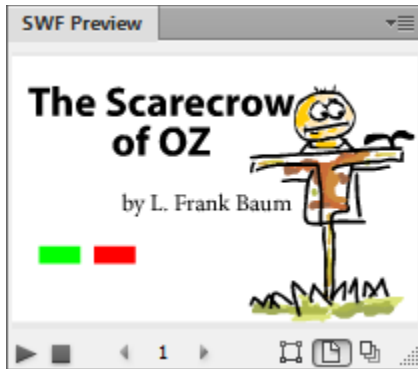
A When multiple objects are selected, you can create **multiple states** in the Object States panel.



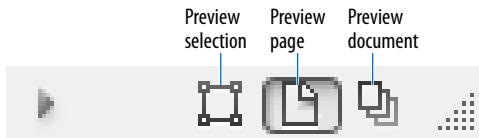
B The icons that show the status of the multi-states of a multi-state object.



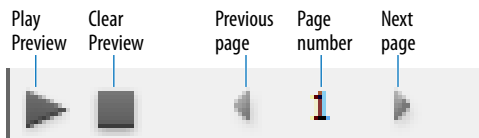
C You can add content to a multi-state by using the **Paste Copied Content** icon.



D The **Preview panel** lets you see and interact with the elements in the document.



E The **preview selections controls** of the SWF Preview panel.



F The **play controls** of the SWF Preview panel.

Working with the SWF Preview Controls

Interactive elements don't react on the InDesign page. Fortunately, you can preview if your elements are set correctly.

TIP The previews of the interactive documents are for SWF output. If you want to see the PDF attributes, you need to view the PDF in Acrobat.

To use the SWF Preview panel:

1. Choose **Window > Interactive > SWF Preview**. This opens the SWF Preview panel **D**.
2. Choose one of the preview selection mode buttons **E**:
 - **Preview Selection** sets the Preview panel to display just the selected object. Use this when you have many interactive elements on a page and need to test just one or two elements.
 - **Preview Page** sets the Preview panel to display the spread currently selected.
 - **Preview Document** sets the Preview panel to display the entire document.
3. Click the Play Preview button **F**.
4. If you edit the document, use the Clear Preview button to delete the previous version of the document from the Preview panel.
5. Use the Next Page and Previous Page buttons to move through the document.
6. Move your mouse over the preview area of the Preview panel. Interactive elements react with the mouse cursor as they would in the exported SWF.

TIP Drag the corners or edges of the Preview panel to increase the size of the preview area in the panel. This makes it *much* easier to control small interactive items.

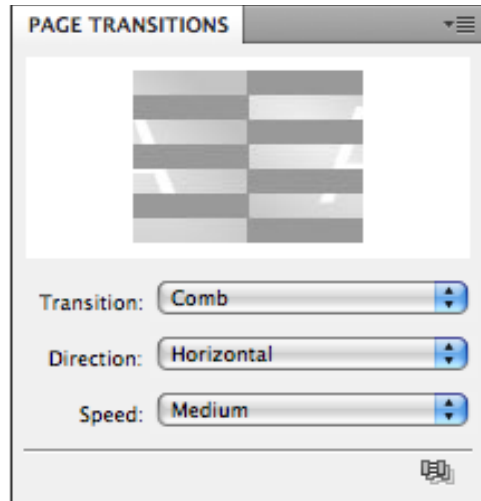
Setting Page Transitions

Transitions are the effects that are applied when the viewer moves from one page to another when viewing the document in Acrobat or the Flash Player.

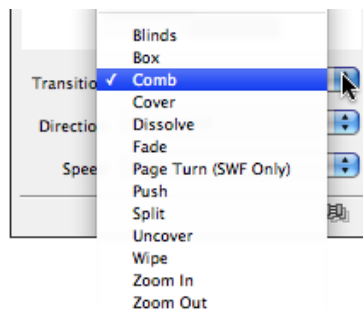
To set the transitions using the Page Transitions panel:

1. Select the pages in the Pages panel to which you want to apply a transition.
2. Choose **Window > Interactive > Page Transitions**. This opens the Page Transitions panel **A**.
3. Choose one of the transitions from the Transition menu **B**.
4. If applicable, set the Direction **C** and Speed **D** for the transition.

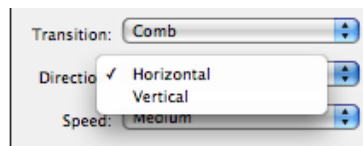
TIP Click the **Apply to All Spreads** icon **E** or choose **Apply to All Spreads** from the panel menu to apply the transition to all the spreads in the document.



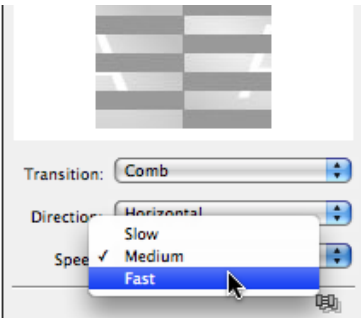
A The **Page Transitions** panel displays the preview of each page transition.



B Choose a transition from the **Transition** menu in the Page Transitions panel.



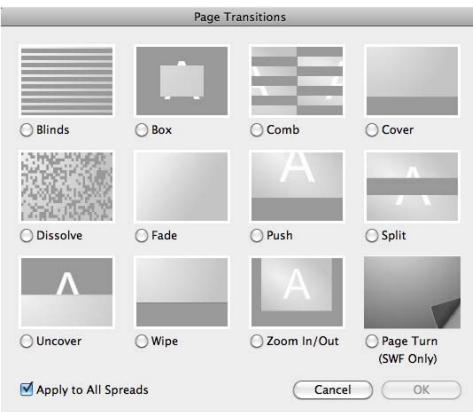
C If needed, use the **Direction** list to apply the direction to a page transition.



D If needed, use the **Speed list** to set the speed of a page transition.



E The **Apply to All Spreads icon** sets a page transition to all the spreads.



F The **Page Transitions dialog box** displays previews of the transition between pages and lets you assign those transitions.

To set the transitions using the Pages panel:

1. Select the pages in the Pages panel to which you want to apply a transition.
2. Choose **Page Transitions** from the Pages panel menu. The Page Transitions dialog box appears **F**.
3. Select one of the transitions.

TIP Click **Apply to All Spreads** to apply the transition to all the spreads in the document.

You may need to clear all the transitions applied to pages.

To clear all the page transitions:

1. Choose **Clear All** from the Page Transitions panel menu or **Page Transitions > Clear All** from the Pages panel menu.

Page Turn or Page Curl?

The Page Turn is a page transition that allows any button to trigger the effect of turning a page. The Page Turn also is applied when the arrow keys on the keyboard are invoked to move from page to page.

When you export the document as a SWF, you have the option of adding a Page Curl. The Page Curl is an interactive effect that allows the reader to move the mouse to any corner and P-U-L-L the page to the next or previous page.

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