

# Adobe InDesign CS6

## Level IV

### Topics:

- PDFs
- Forms
- Global Editing
- Books

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## About Names

Each field name must be unique. The output of a filled form consists of field names and field contents. When a user fills in a text box or clicks a check, that stores a value in the matching field name. Example output of a form looks like this:

Field Name: Field Value

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First Name: Ingrid

Last Name: Designer

Mailing List: Yes

Text1: Lorem ipsum dolor sit amet

Text2: requiescat in pace

Preferred Days: M,R,F,S

## PDFs

A pdf file is generally viewable and compatible with a wide variety of technologies, making it a good choice for a published document format when you are uncertain as to where your work is ultimately being viewed. Part of the appeal of a pdf is the ability to create fillable forms, making the document larger than just the information printed on the page.

## Setup for Creating Forms

The default workspace “Interactive for PDF” is an advantageous choice to begin work on creating a form. Choose Window > Workspace > Interactive for PDF to have access to the panels you will need.

### Adding Fields

A form field is the basic unit of interaction within a fillable pdf. You can either create frames and convert them into fields, or add fields directly from a panel. For text fields, the most direct method is to create the text frame, then use the Buttons and Forms panel to convert it. For buttons, it is more direct to drag a sample button from the Sample Buttons and Forms panel.

### Modifying Fields

The Buttons and Forms panel allows you to change the properties of a field object, and will rearrange its contents depending on what kind of field you have. All fields have at least the following properties:

- field type: text box, list box, check box, combo box, radio button, etc.
- name: the identifying quality of a form object, each name must be unique

Fields may optionally have a description, which helps guide the user to fill out the form, and any of many other options depending on the field type, all selectable within the Buttons and Forms panel.

### Field Groups

A radio button group allows the user to select only one out of a list of options. Each component object of a radio button group



Tab order allows users to use the tab key to move between fields of a fillable form. The default tab order matches the order in which you added the fields to the layout. You can change this order by going to Object > Interactive > Set Tab Order

## mailto:

The mailto action relies on the user's own configuration for default email client, so you may not always want to use a submit button, but instead include instructions to the user to send an email with the completed form attached.

can be any kind of object. To make several buttons part of a group, they each must have the same field name. The field value setting allows each individual button to represent one of the set of mutually exclusive choices for that radio button group. The sample radio groups in the Sample Buttons and Forms panel have three buttons, and you can add more simply by dragging another group over, making sure to change the field name of each to be the same.

## Submit Button

You can add a submit action to a button using the Buttons and Forms panel. The most common submit action is called mailto, and will generate an email with the field contents and send it to the address you specify.

## Exporting the PDF

It is important to choose the Export command rather than the Save command when creating a fillable PDF. Choose File > Export, and then choose the Adobe PDF (Interactive) file type for export. This will present a dialog box with an array of options for how you will create the form. If you do not have the Include All button selected in the Forms and Media line, your pdf will not be fillable, so it is important to select it.

## Global Styles

You have already worked with styles within the context of a single frame. Styles are a means of establishing a uniform look across an entire document or even several documents. Learning how to use styles as a global (rather than local) resource will help speed up your workflow and save you time when editing.



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The different style panels have individual load commands, called Load Object Styles in the case of objects, Load Character Styles in the case of characters, and Load Paragraph Styles in the case of paragraphs. From either the paragraph or character style panels, you can also select “Load All Text Styles,” which loads character and paragraph styles at the same time.

To track changes in the story editor, choose Type > Track Changes > Track Changes in Current Story. Changes will show up with an orange highlight after that selection. Accepting a change clears the change track highlight, but does not alter the document. Rejecting a change reverts the document to its previous state.

## Updating Styles

There are two ways to globally update a style in your document, whether it is a character, paragraph, or object style.

**A** Select the object (or character or paragraph), make changes, then choose “Redefine Style” from the overridden style in the panel right-click menu.

**B** Double-click on the style in the panel itself to open a dialog box and select the changes you want.

In either case, all objects that share the style you changed will update with the selected changes. If an object has an override, a plus sign (+) will appear next to the style name in the panel. You can revert the object to the base style by selecting “Clear Overrides” from the right-click menu.

## External Styles

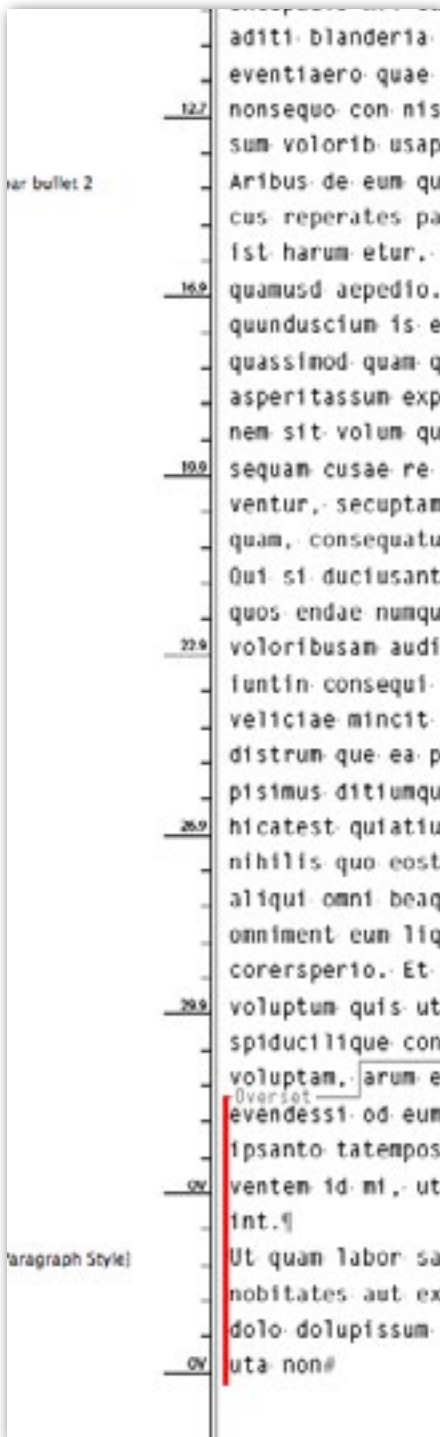
Styles get saved along with an InDesign document. You can reuse styles you have created in other documents by loading them into an open document. Click on the panel menu for in a style panel, then select the Load command. Choose the indd document that has the styles you want. You will get a dialog box that lets you choose from among the available styles in the source document.

## Finding a Font

Sometimes when you open a document on a new computer, the fonts that document uses will be missing. Fonts are stored on computers themselves, and not always bundled into the document. If you find you have a missing font, you can either open the Find Fonts dialog box from the Missing Font warning message at opening time, or use the menu command Type > Find Font, which will open the same dialog box. This will let you quickly identify and correct missing fonts in the document, or select alternatives that will apply across styles throughout the document all at the same time.


## Story Editor

Once you have layout and style settings managed, you may want a way to perform basic text editing without the distractions that the finished presentation can cause. The Story Editor allows you to see a structural view of the text within a selected frame, and even make edits. This view will indicate where text is overset, what non-printing characters appear in the copy, and where tracked changes



The Story Editor

have occurred.

To turn on the Story Editor, choose the menu command **Edit > Edit in Story Editor**. If you wish to see all special characters including nonprinting characters, click on the view options button  in the application bar and check **Hidden Characters**. You can change options about the Story Editor by going to **View > Story Editor**.

## Find and Replace

The Find and Replace feature allows you to quickly locate bits of text or styles in your open document, or even across all open documents. To access this feature, choose **Edit > Find/Replace**.

## Spellcheck

Before you finalize and distribute any publication, it is usually a good idea to run a spellchecker. InDesign comes equipped with a robust spellchecker that allows you to customize options, ignore words, add entries to a custom dictionary and more. To access this feature, choose **Edit > Spelling > Check Spelling**.

## Book Editing

The needs of a complete book are somewhat greater than those of a single document (like a pdf or magazine article). InDesign has tools to manage chapter structure and publishing settings for books and other long documents.

### Starting a Book

In InDesign, a book is a collection of documents. To begin, choose **File > New > Book**. Unlike other documents, you first save a book file, and then add material to it. The New dialog box will provide some options for how to structure your book.

### Adding Chapters

Single document component pieces of a book are called chapters. To add a chapter to your book, use the Book panel menu and select **Add Document**. If you already have several chapters completed, you can add them all at once.

### Book Panel

With several chapters loaded, you can use the Book panel to reorder, add, remove, and change options for your chapters. Much of this happens without looking at specific documents; the panel only contains links to the documents, not the documents themselves. If



you double-click on a chapter, InDesign will open that file and allow you to make edits as you did with any document you have worked with so far.

From there, the Book panel menu contains the options you will need to edit the whole book, including page numbering.

## **Text Variables**

To create a running header or footer that automatically updates with the chapter title, you can create a text variable. Within a specific chapter, choose **Type > Text Variables > Define**. This dialog box lets you create the variable and specify options for it (for example, what paragraph style it should use).

Next, place the insertion point in the desired place on the master page of the document (either in the header or footer area), and choose **Type > Text Variables > Insert Variable**, and then choose the name of the text variable you created.

You can reuse this variable within the other chapters to quickly put the chapter title in the header or footer. Afterward, these variables will automatically update from the chapter titles you create, so you only need to edit each chapter master page once.

## **Automatic Text**

InDesign can create an automatic table of contents or index for your document, so you do not need to type out page numbers or index entries by hand. These fields will also automatically update in case page numbers or reference text changes later.

The table of contents keys off of styles you have chosen to represent outline levels. Using consistent paragraph styles for your headings throughout all the chapters of a book is a prerequisite to building a meaningful table of contents. Once you do have your outline level styles synchronized, choose **Layout > Table of Contents**. This dialog will let you choose which paragraph styles represent headings, and also other options for the table. Wherever a paragraph with the chosen style appears, the table will have an entry with matching page number. Completing this command will load a table of contents onto the pointer, like placing a document. You can then manage it as you would any placed document.

To update a table of contents after making changes, select the text frame that contains the table of contents, and use the menu command **Layout > Update Table of Contents**.

## Wrap-up

Upon completing this workshop, you should be able to do the following:

- Convert an object into a PDF form field
- Assign a submit action in a PDF
- Globally update a style
- Load styles from another source
- Find a missing font
- Edit a text frame in the story editor
- Check spelling and track changes
- Build a book from multiple documents
- Add an automatic table of contents or index
- Create running headers and footers