



Creating interactive PDFs from InDesign.

Adobe Creative Cloud Learning Series



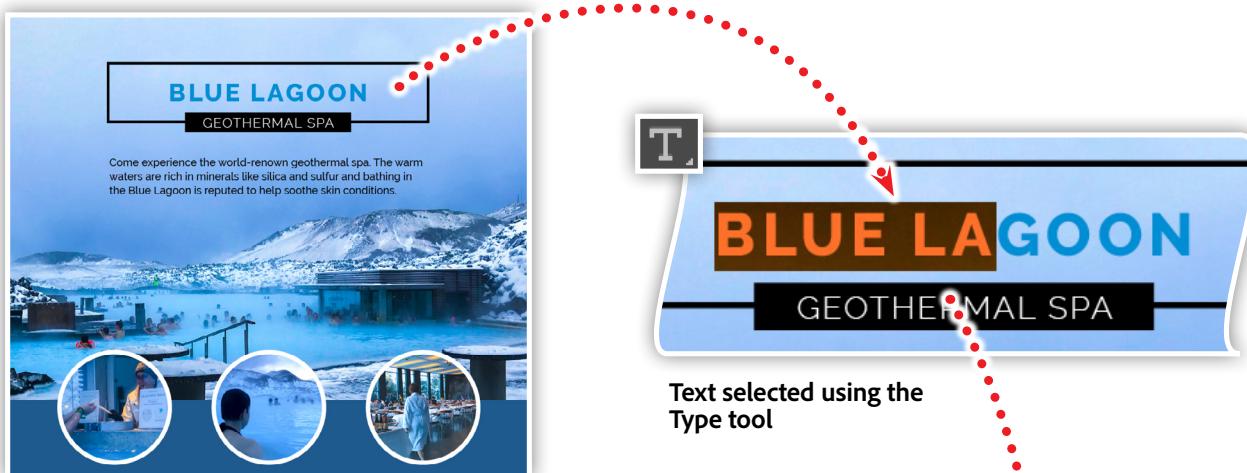
InDesign contains many features that help you format, style, manage, and keep track of the content in your documents. It's what makes InDesign so powerful.

Bookmarks and linked TOCs from InDesign.

Improve the reading experience of your PDF files by adding bookmarks and a table of contents. Learn to use the Table of Contents feature in InDesign to generate both bookmarks and hyperlinks that will help your readers quickly find information in your PDF files.

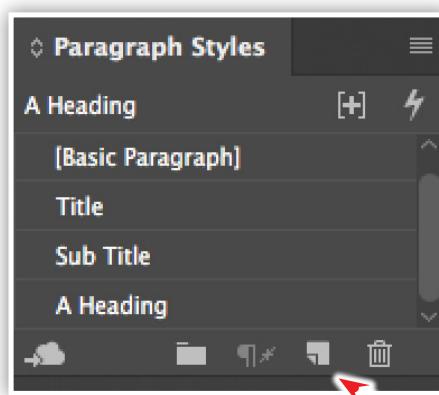
It all starts with Paragraph Styles.

While speaking at [Adobe MAX](#) conferences, I've often referred to InDesign as "the most stylin' app in the Creative Cloud." Styles in InDesign range from paragraph and character styles for text to objects and graphic frames—and can also include tables and table cells, anchored objects, grep statements, nested styles, hyperlinks—and the list goes on.



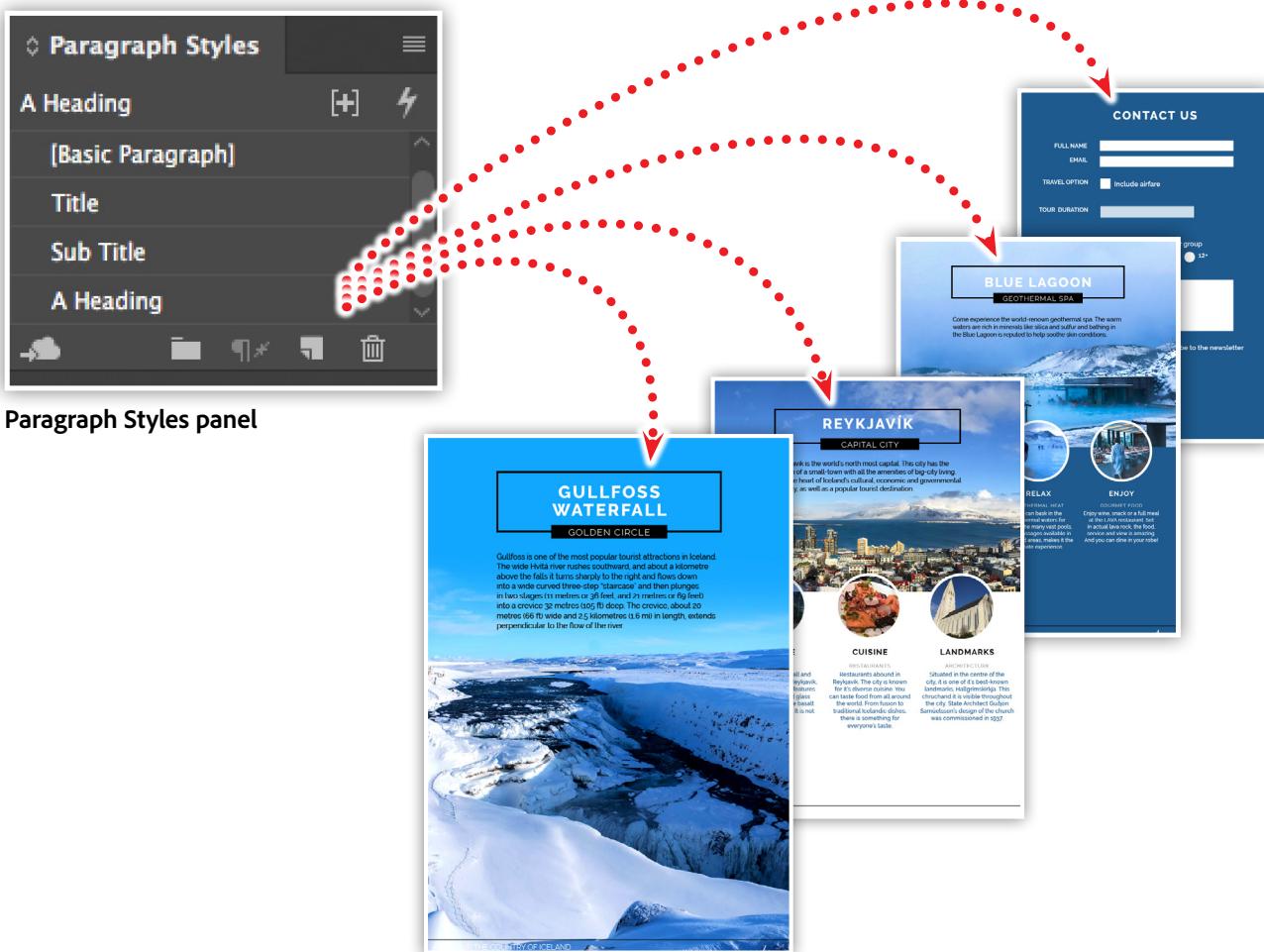
Page layout in InDesign

New Paragraph Style
based on properties from
selected text



Paragraph styles, however, are key for the Table of Contents feature. Typically, styles used for headings work the best for a TOC. To create a Paragraph Style, begin by opening the Paragraph Styles panel from the Window > Styles menu. Next, select the characters of your headline within your Layout. With the text still selected, click the Create new style icon in the bottom-right of the Paragraph Style panel. This will create a style based on the properties of the text you had selected.

To rename your style or make style changes, double-click the new paragraph style in the list to open the style options dialog box. Once you finish editing your style, assign the style to your headline by selecting the characters of your headline, then selecting the paragraph style from the list of styles in your Paragraph Styles panel.



Advanced Tip: If you hold the Option key (Mac) or the Alt key (Windows) when clicking the create new style icon, the properties dialog box will immediately open from the Paragraph Styles panel, allowing you to edit the new style right away.

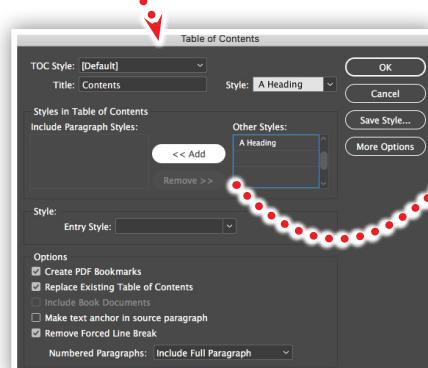
Throughout your InDesign document, be sure to apply the Paragraph Style to all of the headings. Not only will this allow you to make design changes faster, but it will also help us add bookmarks and interactivity within a PDF file.

Creating a table of contents.

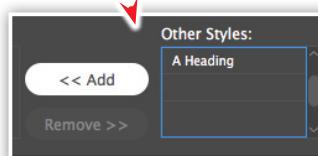
The Table of Contents feature gathers the contents and page numbers of specific paragraph styles in order to provide a list of the contents included in your publication. This content is created automatically and can be updated as your document is edited. While this provides very useful textual information in regard to finding content, this same information can also be used to make your document interactive when exporting to PDF.



Choose a location in your document



Choose Layout > Table of Contents to define TOC properties



Choose the paragraph styles to be included



Click-and-drag a new text box that contains the TOC content, including the text and page numbers for each included paragraph style

To begin to create a TOC, find a location in your document where you'd like the TOC to appear. Next, select Table of Contents from the Layout menu. We'll be setting a few properties within this dialog box, starting with setting the title to simply "Contents." In the Styles in Table of Contents section, we'll choose the paragraph style for our heading and click the Add button.

The Options section of the Table of Contents dialog box includes the Create PDF Bookmarks option. Checking this option will result in a PDF file that includes bookmarks that link directly to the corresponding content within the document. This feature also results in a more structured and searchable PDF file. Bonus!

When finished, click OK to return to your document with a loaded text cursor. Click to add a new story into your document that includes all of the TOC information.

Updating the table of contents.

Because the TOC is automatically generated, making changes involves revisiting the Table of Contents dialog box. To do this, select the TOC text frame in your layout, then choose Table of Contents from the Layout menu.

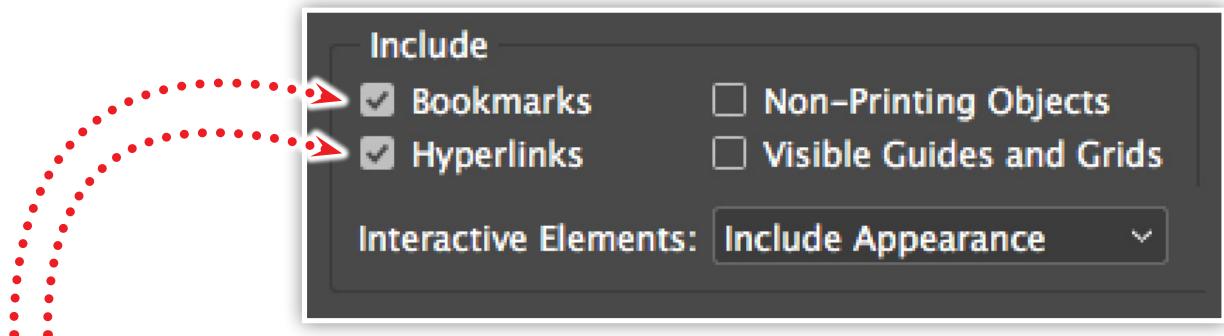


Continue to make edits in this dialog box, including changes to the title, included paragraph styles, and various options, then click OK. The selected text frame will update with your new settings. You can update the Table of Contents as often as you like.

After you have finished designing your document, you'll want to update the TOC entries and page numbers. Just as we did before, select the TOC text frame, then choose Update Table of Contents from the Layout menu. This will refresh the content of the TOC based on all of the settings we defined earlier.

Exporting an interactive PDF.

Now that we have added a TOC to our document, we'll need to make sure we check the options for Bookmarks and Hyperlinks in the PDF export dialog box. InDesign provides a few ways to export a PDF file.

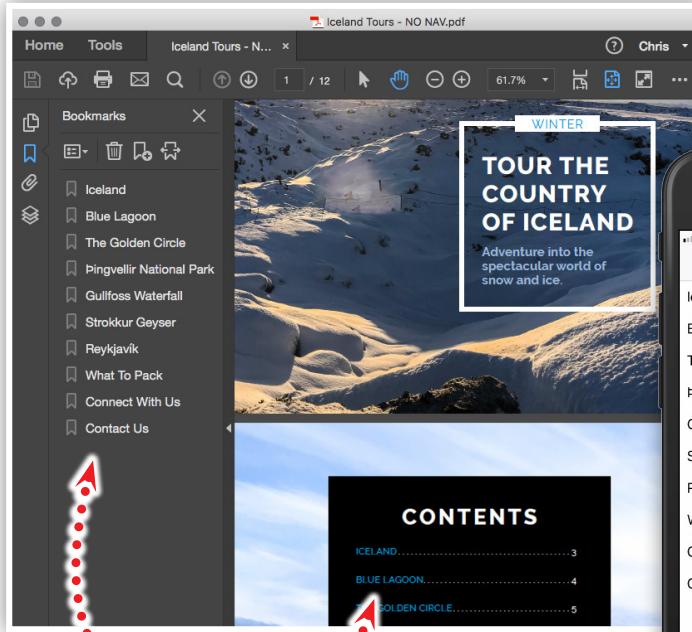


In order to preserve the links in your PDF file,
be sure to include Bookmarks and Hyperlinks
in the Adobe PDF dialog box

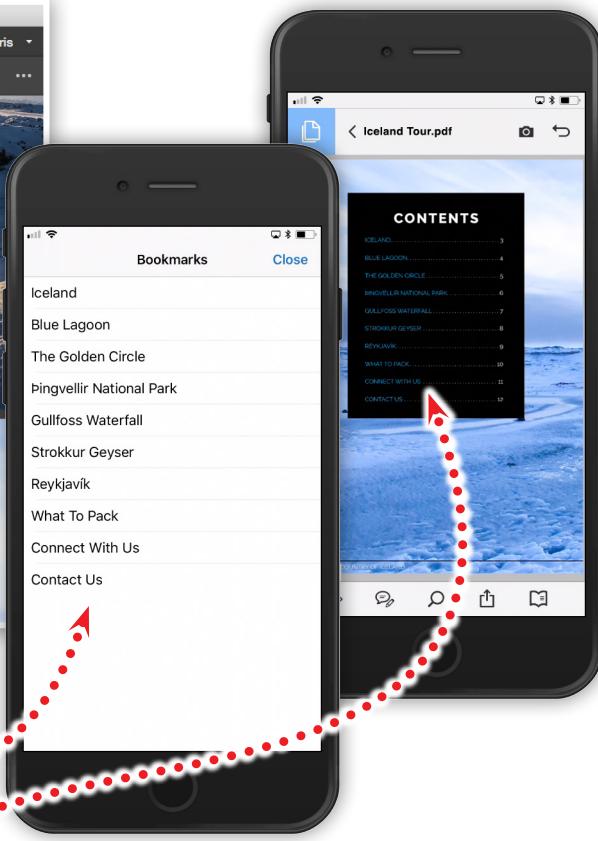
If you have created PDF presets in any Creative Cloud application, they will be available in the File > Adobe PDF Presets menu. You can also use one of two pre-defined Format presets located in the File > Export menu. These presets are named Adobe PDF (Print) and Adobe PDF (Interactive).

In the Export Adobe PDF dialog box, be sure to check the options for Bookmarks and Hyperlinks. These options are automatically checked when choosing the Adobe PDF (Interactive) option. The resulting PDF file will now contain a hyperlinked TOC as well as a corresponding Bookmark for each TOC entry.

Adobe Reader on desktop computer



Adobe Reader on mobile device



Bookmarks and Hyperlinks generated from the Table of Contents feature of InDesign

Graphical hyperlinks and nested master pages in InDesign.

Hyperlinks can do more than link to websites. Combining Hyperlinks with Text and Page Anchors allows you to provide quick access to key areas of your PDF document. Applying Hyperlinks with Master Pages allows you to quickly manage a navigation system throughout all of your pages.

Creating hyperlinks in InDesign.

Hyperlinks can be added and managed within InDesign from the Hyperlinks panel, located under the Window > Interactive menu. To create a hyperlink to a website, select some text in your layout, then click the Create New Hyperlink icon. In the New Hyperlink dialog box, choose URL in the Link to dropdown menu, then enter the full URL, including "http" into the URL field. Choose an optional Character Style or PDF Appearance if you wish, then click OK. Your new URL-based hyperlink will show in the list of links associated with the InDesign Document.

Select some text in your layout

Click Create New Hyperlink icon in the Hyperlinks panel

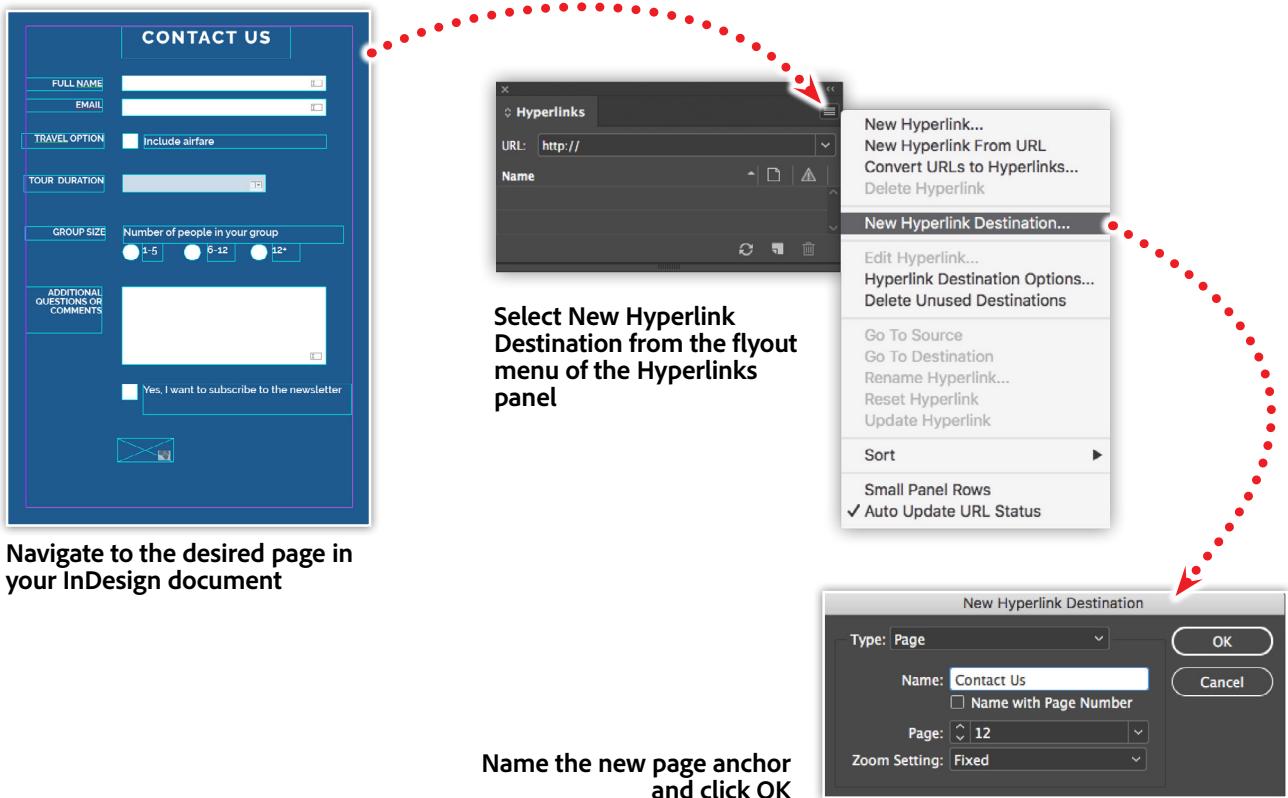
Define the destination URL, Character Style, and optional appearance settings in the New Hyperlink dialog box

If you'd like to speed up the Hyperlink creation process, simply select some text, then add a full website URL into the URL field in the Hyperlinks panel and press Return. This will create a new hyperlink with all of the previously used settings.

Creating page and text anchors.

Text and Page Anchors provide you with a way to add an invisible object or destination point within your InDesign document. These anchors can be set as the target or destination of a hyperlink. What's even more useful is that these anchors move with the page or text that they are assigned to—so if you add or remove pages or text, your hyperlinks will still go to the correct destination.

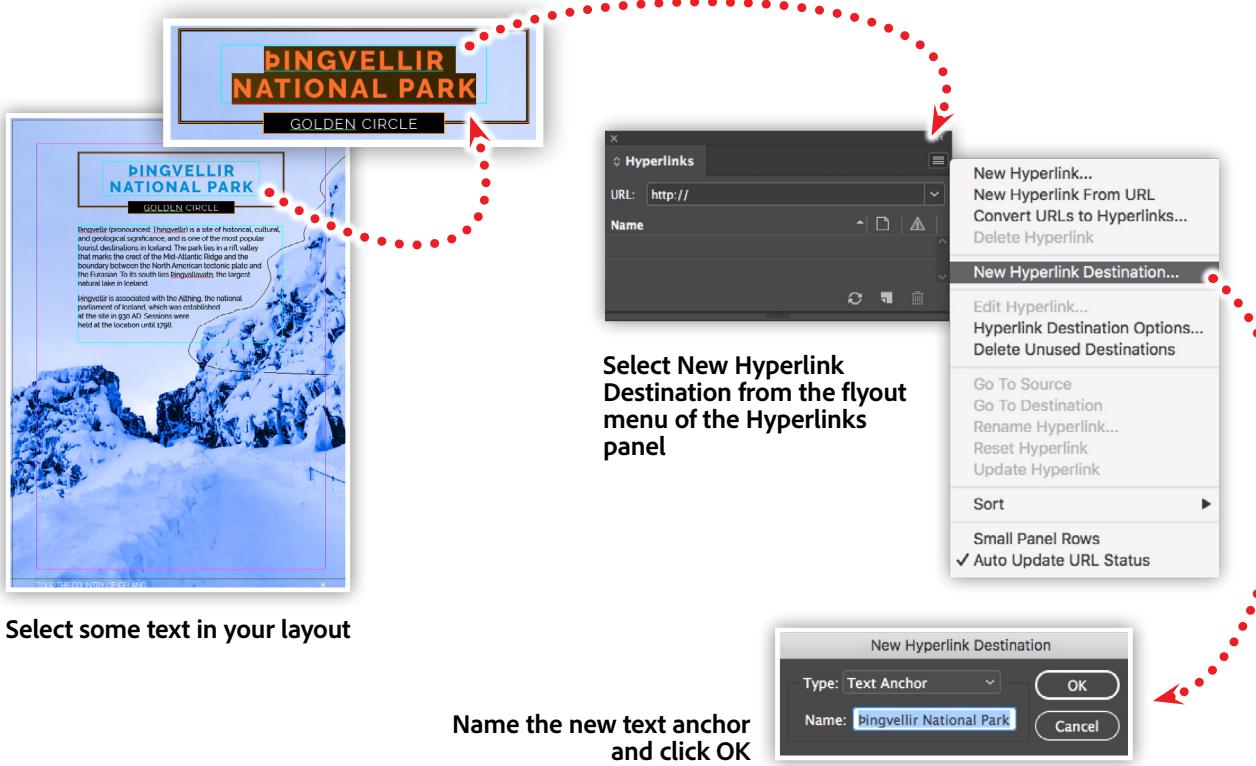
To create a page anchor, navigate to the desired page in InDesign, then select New Hyperlink Destination from the Hyperlink panel's fly-out menu. The New Hyperlink Destination dialog box will default to setting the type of destination to a Page, and the name and page number of the document will match the page you are currently viewing. There is also an option to change the zoom setting of the page when a reader goes to this anchor in the resulting PDF.



You can change the name of the Page anchor to make it easier to locate later. In the example above, I'll keep the name that was automatically generated from my selected text.

Advanced Tip: You do not need to navigate to a specific page in InDesign before creating Page anchors. It is possible to set all of your page anchors from the Hyperlinks panel while viewing any page in your document. Once you define a New Hyperlink Destination, choose your desired page number form the page dropdown menu.

Text anchors work a lot like page anchors, except they are inserted into the text of your document. To create a text anchor, select some text within your InDesign document, such as a heading, then choose the New Hyperlink Destination item from the Hyperlinks panel fly-out menu.



The selected text will be the default name given to your new text anchor. You can rename your text anchor, and keep in mind that each text anchor needs a unique name. If you want to see exactly where your text anchor is being assigned, you can see it in the story editor. With either the text frame selected, or some text selected, choose Edit in Story Editor from the Edit menu. In the editor you'll see a small target icon that represents the text anchor.

Linking to page and text anchors.

Now that we have some page and text anchors in our document, we can now make hyperlinks that will link to those internal destinations. I'll start by selecting some text in my layout, then adding a hyperlink to that text by clicking the Create New Hyperlink icon in the Hyperlinks panel. In the dialog box, I'll change the Link To option to a Text Anchor, then select the text anchor I'd like to link to from the Text Anchor dropdown menu.

The image illustrates the steps to create a hyperlink from a piece of text in a layout to a specific text anchor defined earlier in the document.

Select some text in your layout

Select New Hyperlink Destination from the flyout menu of the Hyperlinks panel

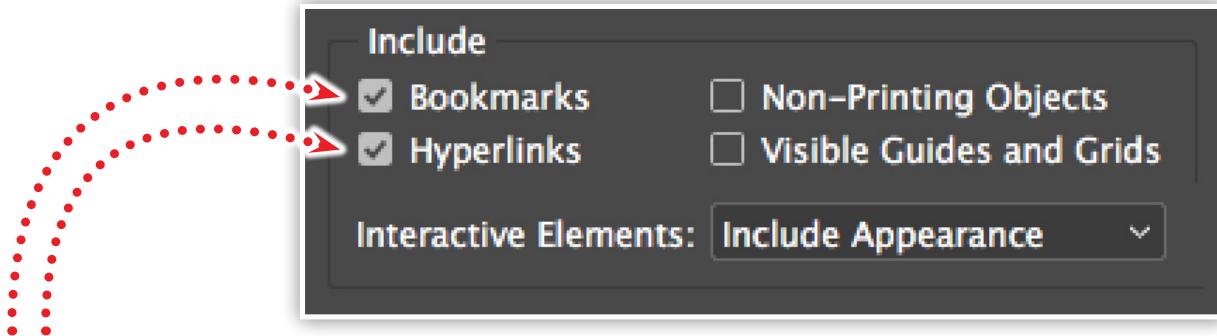
Choose Text Anchor from the Link To dropdown menu, then select the desired text anchor from the dropdown menu

The top section shows two versions of a travel brochure for "The Golden Circle". The left version has a red dotted arrow pointing to the text "PINGVELLIR NATIONAL PARK" in the list of interests. The right version shows the same text with a red dotted arrow pointing to the same text, indicating it has been selected as a target for a hyperlink.

The middle section shows the InDesign Hyperlinks panel open. A red dotted arrow points to the "New Hyperlink Destination..." option in the flyout menu.

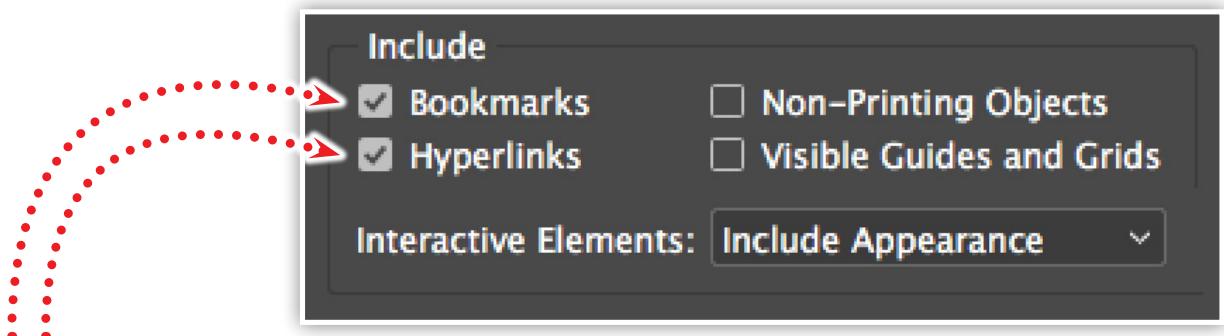
The bottom section shows the "New Hyperlink" dialog box. A red dotted arrow points to the "Text Anchor" dropdown menu in the "Link To:" section, which is set to "Text Anchor". Another red dotted arrow points to the "Text Anchor" dropdown menu in the "Destination" section, which is set to "bingvellir national park".

Hyperlinks can be applied to objects, as well as text, within your InDesign document. This means we can link graphic objects to Page or Text Anchors. This technique allows you to provide a more visual navigation system to your PDF file, while maintaining compatibility across all devices.



In order to preserve the links in your PDF file,
be sure to include Bookmarks and Hyperlinks
in the Adobe PDF dialog box

First, I'll create a new Master Page named "C-Nav," then I'll import a checklist graphic from Illustrator. Next, I'll select the graphic, and add a hyperlink that links to a Text Anchor I created for the Checklist page. I'll repeat the process to create a series of links that go to the first, contents, and the contact pages.



In order to preserve the links in your PDF file,
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in the Adobe PDF dialog box

Now, to apply the navigation master page to other master pages, we'll make use of InDesign's ability to nest one master page into another. To achieve this, I'll click and drag the C-Nav master page icon and drop it directly on top of the two other master pages. This will, in turn, combine the navigation elements of master page C with the elements of master pages A and B.



Watch these features in action.



Join Chris Converse in the recorded webinar and learn how to use features such as Table of Contents, Hyperlinks, and Nested Styles and Nested Master Pages to create a user-friendly interactive PDF desktop computers and mobile devices.

In this session you'll learn the following:

- Design documents for better usability
- Use advanced styles for greater control
- Add interactive content such as hyperlinks
- Create Paragraph and Character Styles
- Define and update a Table of Contents for your document



Adobe Creative Cloud e-Learning Series

Watch the live recording here:

[Creating interactive PDFs from InDesign](#)



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