

# *How to Prepare a Digital Edition PDF Book With Adobe InDesign*

This tutorial will offer you some advice on how to use Adobe InDesign to prepare an optimized digital edition PDF book.

There are two ways to produce a digital edition PDF presented in this tutorial. One way will use InDesign to directly export a PDF at a resolution appropriate for viewing on computers and devices. The other will use Acrobat Pro to optimize an existing high-resolution PDF. If you do not have Acrobat Pro and wish to test this process, you can download a trial version from the Adobe website: [www.adobe.com](http://www.adobe.com).

## *The Tutorial is Broken up into Sections:*

1. Setting up your InDesign Document
2. Adding Cover Images and Setting Up Pagination
3. Adding Bookmarks
4. Adding Hyperlinks
5. Exporting your InDesign file as a PDF ebook
6. Optimizing a high-resolution PDF using Acrobat Pro
7. Tips and Things to Remember
8. What do I do Next?
9. I Need More Help!

## *What do I Need?*

This tutorial will have you use Adobe InDesign to create your content and cover and prepare them as a print-ready PDF.

The screenshots shown in the tutorial use Adobe InDesign CS5.5 for Mac. If you are using different versions of the software, some of the instructions and screenshots will be slightly different, but you should be able to find the right feature in your software version.

## *How do I Get This Software?*

Adobe InDesign is available from Adobe at [www.adobe.com](http://www.adobe.com). Adobe does have educational discounts on their software if you are able to take advantage of them:

<https://store1.adobe.com/cfusion/store/html/index.cfm?store=OLS-EDU&event=displayCatalog&catalogOID=2071995>

Or get it as part of the Creative Cloud and pay a monthly fee.

<http://www.adobe.com/products/creativesuite/designstandard.html>

# 1. Setting up your InDesign Document

For your convenience, we have created a few template files for different standard book sizes to make your layout work easier. You can find these templates under the [Digital Tutorials and Templates of the Publisher Knowledge Base](#), under [Title Management/ Digital Titles](#).

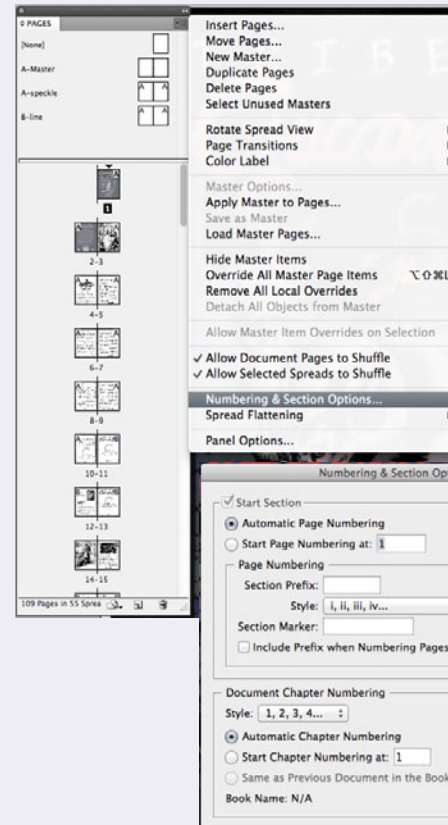
Setting up your file is nearly identical to setting up a book for print but the specifications are much looser. If you plan to produce both print and digital editions, you should set up your book files to print specs and then produce a digital book from the same files.

(For more information about the mechanics of setting up your InDesign file for print, e.g., creating Master Pages, importing and styling text using Style Sheets, and placing art, see the DriveThru tutorial for InDesign in the [Print Templates and Tutorials page of the Publisher Knowledge Base](#), under [Title Management/ Book Printing](#).

# 2. Adding Cover Images and Setting Up Pagination

*Before you begin any method of PDF export described, make sure your front and back cover files are the first and second pages of your PDF digital edition.* You can add two pages at the beginning of your interior text file document, and then place your cover images on those pages. Save your document before you begin the next step.

Next, you will want to change the pagination of the cover pages to Roman numerals (i, ii). This is a good idea to do because the cover pages won't goof up the interior book block pagination. Those page numbers will still reference the Table of Contents.



First, using the [Pages](#) palette, expand the palette options from the icon in the upper right corner of the palette. Navigate down to and select [Numbering & Section Options](#).

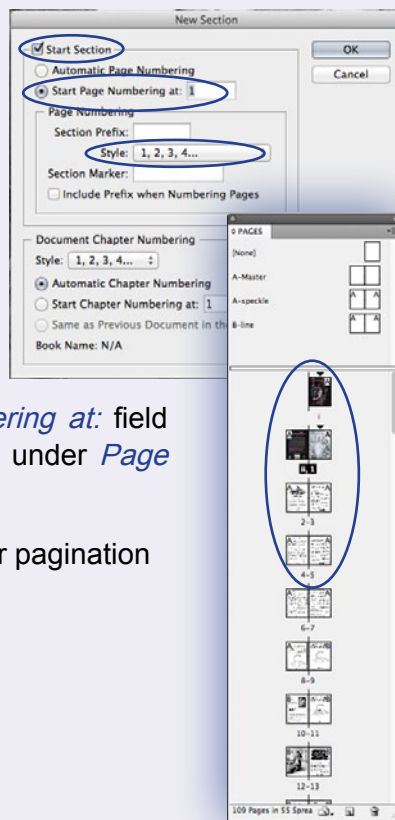
The [Numbering & Section](#) options dialog box pops up. Under [Page Numbering](#), select the Roman numerals from the drop-down menu. Click [OK](#).

## 2. Adding Cover Images and Setting Up Pagination (continued)

The entire book now changes to Roman numeral pagination. To fix this, you will need to select page iii (page 3) in the *Pages* palette, force a Section start, and repaginate the rest of the book using Arabic numerals.

With page iii selected in the *Pages* palette, expand the palette options, and navigate down to *Numbering & Section Options* again. This time, check *Section Start*. Make sure the *Start Page Numbering at:* field is set to *1*. Then in the *Style* drop-down under *Page Numbering*, select the Arabic numerals.

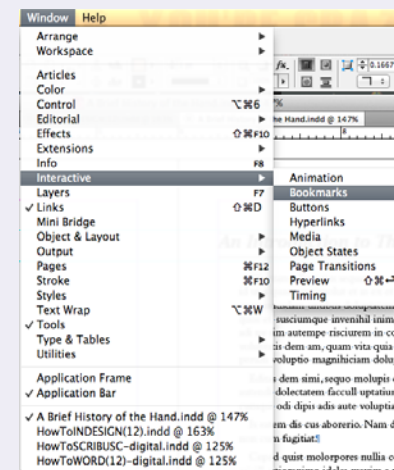
Now if you check your *Pages* palette, your pagination should be correct.



## 3. Adding Bookmarks

To make navigating through a large PDF book easier, bookmarks can be made in your InDesign document, which can be exported and used in your final PDF digital edition. A good use of bookmarking is to place one at the first page of every chapter in your book, so readers can jump straight to the chapter of the book where they last left it.

You will need to open your *Bookmarks* palette. To find and open it, pull down the *Window* menu from the top of your screen, navigate down to *Interactive*, then select *Bookmarks* from the expanded contextual menu. A check box next to the list item indicates that palette as being open in your workspace.



## 3. Adding Bookmarks (continued)

Next, navigate to the text in your document that you would like to assign as a bookmark. Highlight that text with your cursor. Then, to create a new bookmark, either click the page icon at the bottom of the box next to the Trash Can icon in the *Bookmarks* palette, or expand the menu options from the top right-hand corner of the palette and select *New Bookmark*.

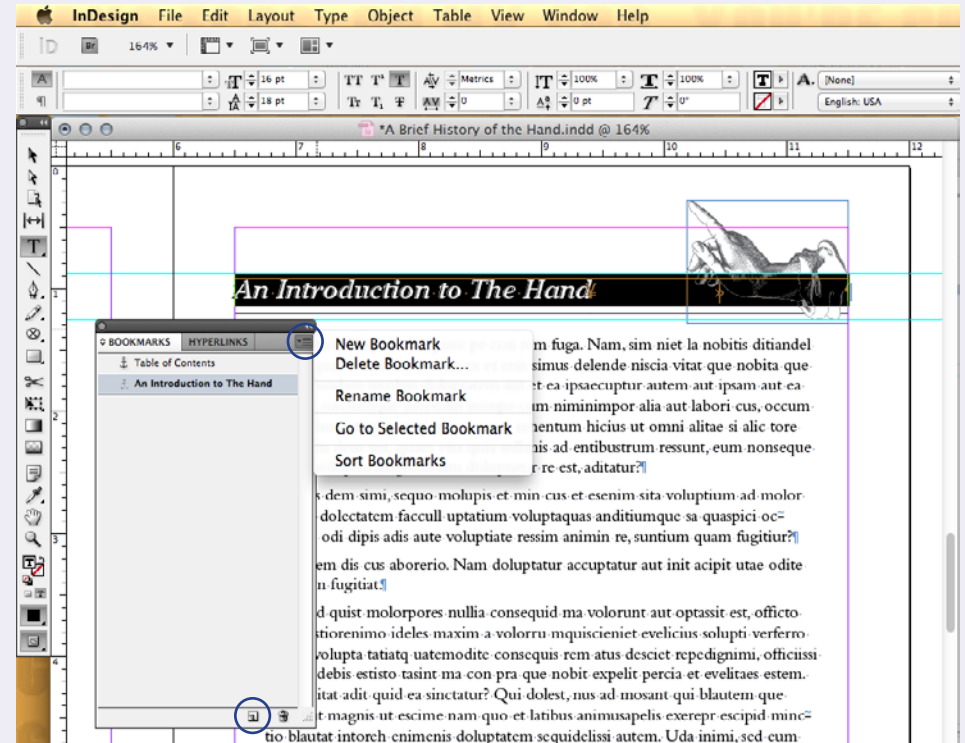
The text you have highlighted will now appear in the *Bookmarks* palette list. An anchor icon will appear to the left.

You will need to proof this list and rearrange as necessary. To manage the bookmarks in your document, use this palette.

Bookmarks will appear on this list in the order they are made, not in the order they occur in the document. To reorder your bookmarks, expand the menu from the top right-hand corner and choose *Sort Bookmarks*. This automatically rearranges the bookmark entries by page order as they occur in the document.



You can also create hierarchies in the Bookmark palette. To make a sub-level bookmark, you can drag and drop a bookmark on the list and nest it underneath another. See the screenshot below for an example.



If you are also preparing your digital book for export in the epub format, you can make InDesign autogenerate a Table of Contents for the front or back of your book, which automatically adds and inserts bookmarks in your document based on your TOC information. Find out more about these mechanics under the **DIGITAL TITLES** section of your publisher menu. Choose the *Epub & Mobi Export* link.

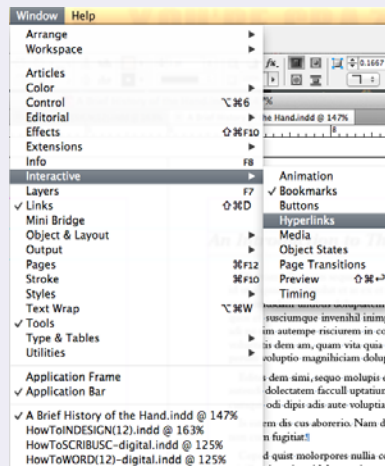
# 4. Adding Hyperlinks

In some digital books, you may want to add links between pages that occur in your document, such as links from the entries in your Table of Contents to your chapter starts, or links to destinations outside your document, such as a web URL. In Adobe InDesign, you can dictate link destinations from text or a placed art file. Link destinations can be to other locations inside the same document, to other documents, to an email address, or to a web URL.

In this tutorial, we'll cover linking within the same document, and linking from inside your document to an outside web URL.

*If you choose to add interactivity to your digital edition, make sure to test each created link in your final PDF after export.*

You will need to open your *Hyperlinks* palette. To find and open it, pull down the *Window* menu from the top of your screen, navigate down to *Interactive*, then select *Hyperlinks* from the expanded contextual menu. A check box next to the list item indicates that palette as being open in your workspace.

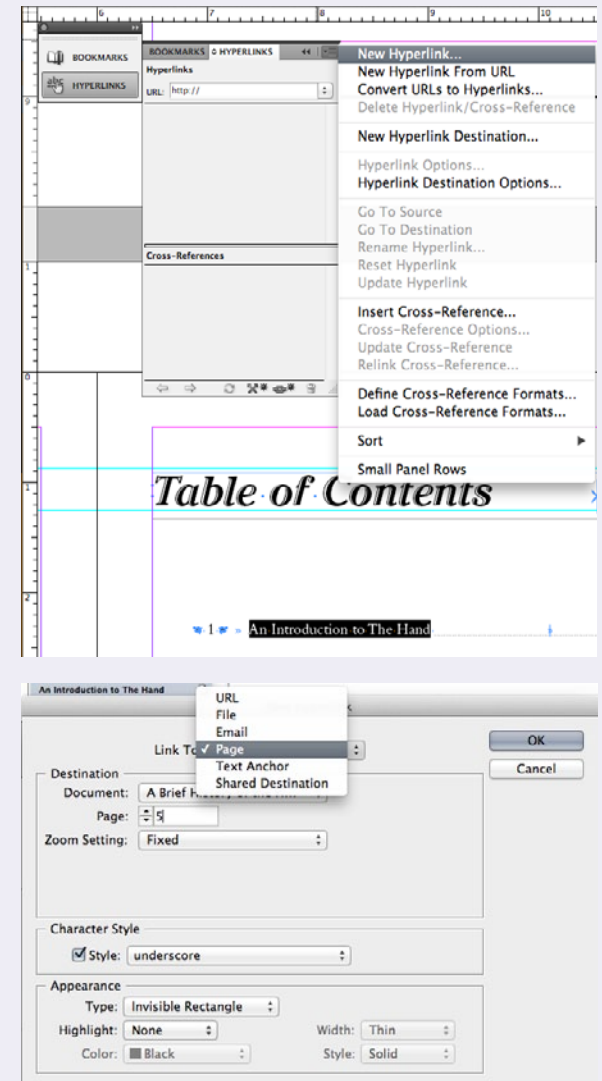


## Adding links between pages

Assigning hyperlinks between pages in your document (or multiple documents) is very easy using InDesign. We'll begin here by making a hyperlink from the first link of the Table of Contents to the chapter in the book it should jump to.

Using your text cursor, highlight your source text. Then expand the menu of your *Hyperlinks* palette from the icon in the top right-hand corner. Select *New Hyperlink*.

The *New Hyperlink* dialog box will open. Expand the *Link To:* options by expanding the drop-down menu. Choose *Page* as your link destination.

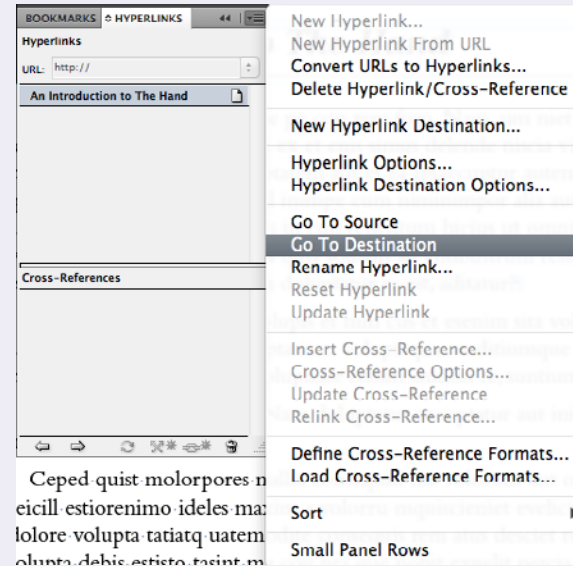
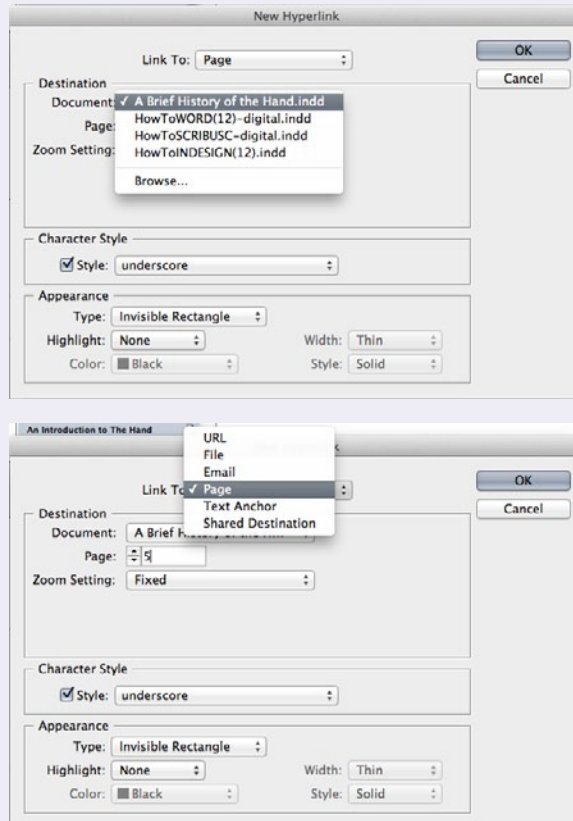




## 4. Adding Hyperlinks (continued)

Now set your *Destination* information. If you expand the *Document* drop-down, you will see a list of all the saved InDesign documents you currently have open. You can choose from this list if you are linking to the document you are currently working in, choose a different document that is already open, or choose *Browse...* to find and open a different InDesign document to assign your link destination to.

Make sure that you have set your destination page number to reflect the page number of the source on your TOC. You should also choose your Zoom settings here. If you have already created a Style Sheet for formatting your hyperlink text, you can expand the *Character Style* drop-down menu and choose your style. When you have completed your Destination and Appearance details, click *OK*. Your new hyperlink will appear in the Hyperlink palette.

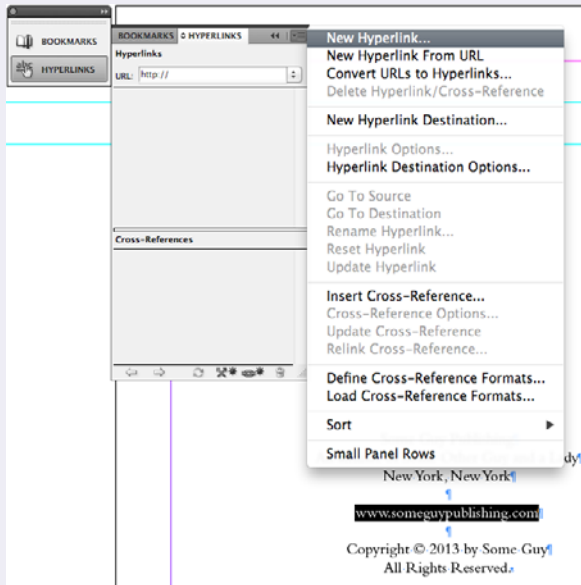


You can test your new hyperlink by selecting it in your *Hyperlink* palette, expanding the *Hyperlink* menu options, and selecting *Go to Destination*. Your page view should jump to the destination you have just assigned.

## 4. Adding Hyperlinks (continued)

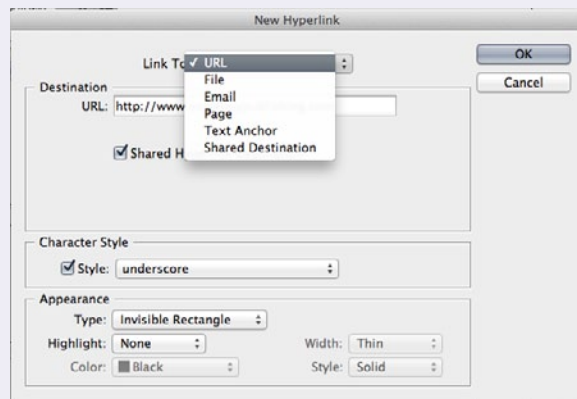
### Adding links to web URLs

There are several ways to add hyperlinks to URLs in your document. Once you become familiar, you will find the way that works best for you.



Using your text cursor to select your source text, expand the options menu of your *Hyperlinks* palette by clicking the top-right icon. From the list, select *New Hyperlink*.

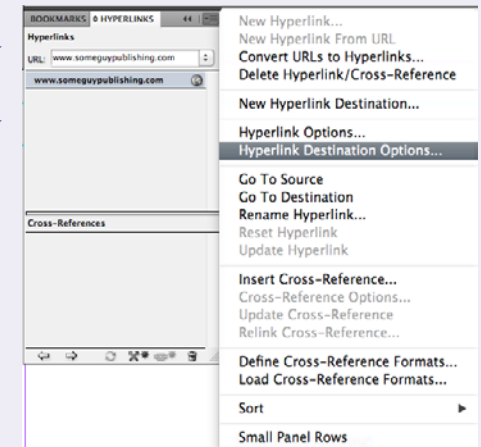
The *New Hyperlink* dialog box will open. Expand the *Link To:* drop-down menu and select *URL*. The URL in the *Destination* field can be any valid Internet address (*http://*, *ftp://*, *mailto://*, etc.).



When you have completed

your Destination and Appearance details, click *OK*. Your new hyperlink will appear in the Hyperlink palette.

Another way to create a hyperlink to a URL is to choose *New Hyperlink from URL* from the expanded menu options of the *Hyperlink* palette. The link will automatically generate and will appear in the list on your Hyperlink palette. Should you choose this method, make sure to select that URL on your list and review the Hyperlink Options and Hyperlink Destination Options associated with it. Check to make sure your Destination and Appearance details are correct before proceeding



## 5. Exporting Your InDesign file as a PDF ebook

Now that you've completed setting up your book for print, exporting it as a digital PDF ebook is easy!

There are three ways to make an optimized digital edition from your InDesign file:

1. Export a PDF directly from InDesign, adjusting your PDF export settings to make them appropriate for viewing on a computer, a tablet or other mobile device.  
(This method will be covered in the following pages.)
2. Use your print-ready PDF and optimize it in Acrobat Pro using the *Preflight Print Production Tool*. When you open the Preflight tool, make sure to choose the *Online Publishing (optimize for quality)* profile under the *Digital Printing and Online Publishing* profile options.  
(This method will also be covered in the following pages.)
3. Export a postscript file from InDesign or Acrobat Pro for processing in Acrobat Distiller. This method uses a custom profile setting, called a .joboption file, made in Distiller.  
(Although this method tends to make more stable files that are less prone to errors than ones exported directly from InDesign, it will not be covered here.)

***Please do not use any Security settings in your digital edition export.*** The ability to copy/paste or print the digital edition can be managed under the *File Security* settings in your *Product File* information when you upload the book. Any security settings imposed on your uploaded digital edition will hinder our automatic watermarking process during customer check-out.



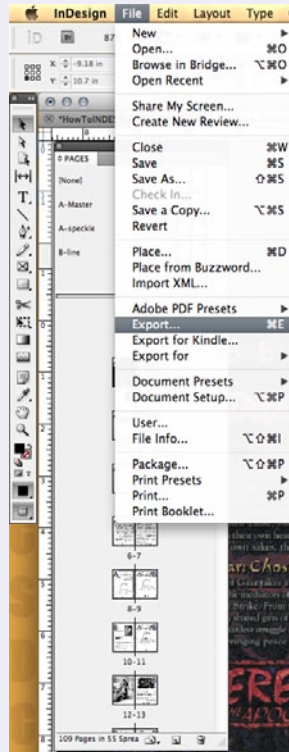
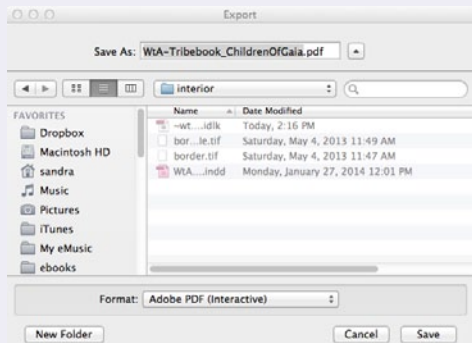
# 5. Exporting Your InDesign file as a PDF ebook (continued)

## Export a PDF directly from InDesign

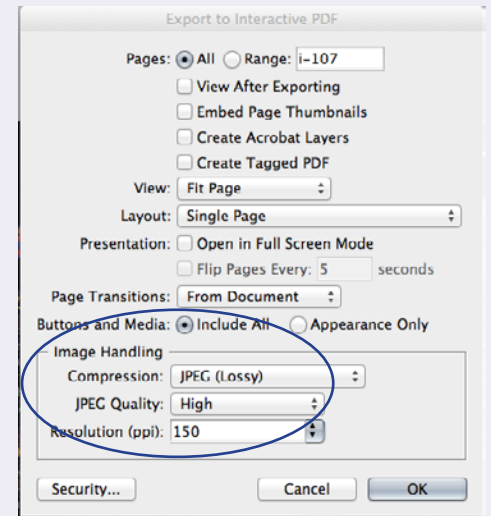
Although the Preflight tool in Acrobat Pro is more comprehensive in its profile settings, and Distiller tends to make more stable PDFs than direct InDesign exports do, the process we'll be overviewing in this section is the direct export method.

With your newly paginated file open, select **Export** from the **File** drop-down menu.

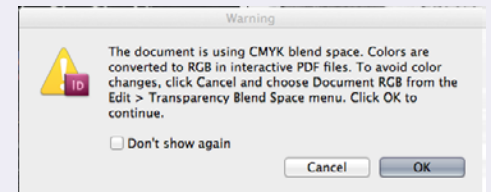
An **Export** dialog box will open. Navigate to the location you would like to save your new PDF, rename it so as to not overwrite any other files, and then make sure **Adobe PDF (Interactive)** is selected as the **Format**.



The **Export to Interactive PDF** dialog box will open. Adjust your settings to match the settings shown in the screenshot to the right. ***Epecially important is to choose JPEG Compression, not JPEG 2000 compression under the Image Handling setting.*** Many devices don't render images using JPEG 2000 compression, so it's best not to set the file up for potential viewing errors.



Once you have adjusted your export settings, click **OK**. A **Warning** dialog box may pop up at this point, to warn you that color shifting may occur in the process because your CMYK file will be converted to RGB values. This conversion process is necessary, so just click **OK**.



Make sure to proof your new PDF when it's complete.

# 6. Optimizing a high-resolution PDF using Acrobat Pro

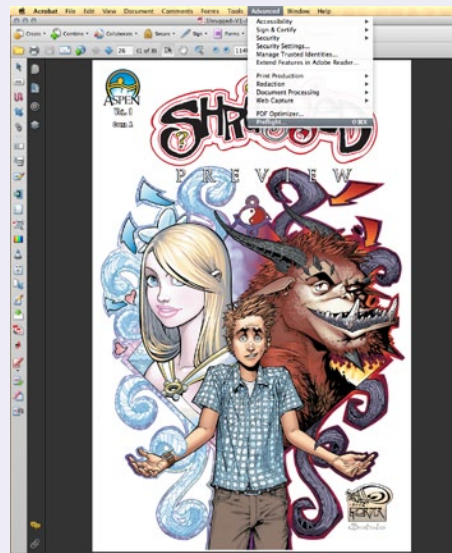
## Using the Preflight Print Production tool

You can take a high-resolution PDF and process it for web and device viewing by using this tool in the full version of Adobe Acrobat. Again, your file should include the front and back covers at the front of the document and have pagination that sets those pages off from the rest of the book.

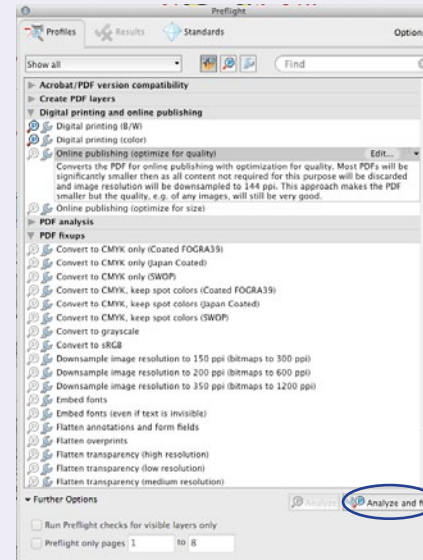
Open your PDF file in Adobe Acrobat. Depending on the version of Acrobat that you are using, you can either expand the *Tools* pane from the upper right-hand corner of your window, expand the *Print Production* tools and navigate down to *Preflight* (Version X) or pull down the *Advanced* menu from the application bar, and navigate down to *Preflight (Versions 9 and earlier)*.



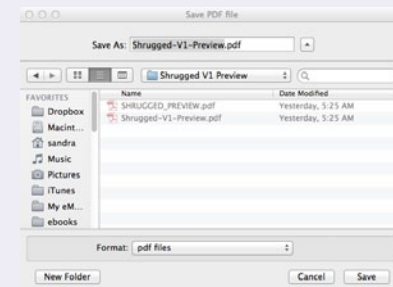
Acrobat X



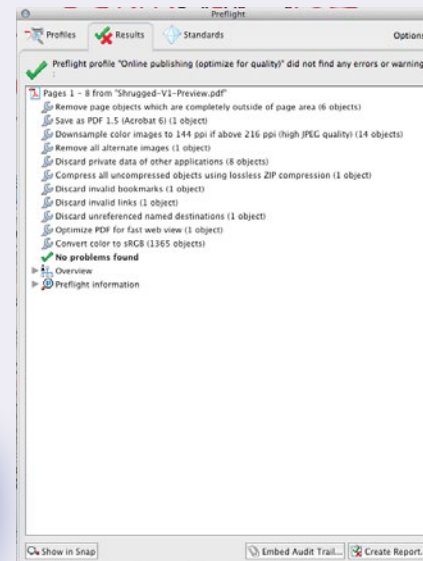
Acrobat 9 and earlier



The *Preflight* dialog box will open. Expand the profiles for *Digital printing and online publishing*, and choose *Online publishing (optimize for quality)*. Then click the *Analyze and fix* button at the bottom right-hand corner of the box.



A dialog box will open, prompting you to save the file. Make sure to change your file name slightly so as not to overwrite your high-resolution print PDF file. Click *Save*. Then the Preflight process will begin.



Once Preflighting is done, the *Preflight* dialog box will list a report of tasks completed. If your file was successfully processed, a *green check mark* will appear in the top left-hand corner of the window. If it failed, a *red X* will appear in the same place. On failure, you can poke through the process report in the dialog box to see what elements failed, and then go back and fix those elements before trying to Preflight again.

To learn more about using Adobe Acrobat for bookmarking and hyperlinking, refer to DriveThru's *Quick Specs for Digital Books*.

## 7. Tips and Things to Remember

### Specifications

Although exporting your PDF using the methods provided will take care of most of the specifications required of a digital PDF ebook, there are a few things that are important enough to bring to your attention again. These points are listed in DriveThru's *Quick Specs* document and *Checklist for Digital Books*, both of which can be found on the **HOW DO I PREPARE DOWNLOAD FILES FOR MY DIGITAL TITLE** link under *Digital Titles* in the **PUBLISHER KNOWLEDGE BASE** section of your Publish Menu.

- **DO NOT** use JPEG2000 compression in any linked or embedded JPEG art files, even if it reduces your file size. Apple's iPad and iPhone cannot display images using JPEG2000 compression.
- **DO NOT** use PDF/A profile compliance for your exported PDF.
- **DO NOT** use transparency in your document or images. Apple's iPad and iPhone also have problems displaying PDFs with transparency attributes.
- **DO NOT** lock or use security settings in your exported PDF. This means imposing password protection as well as turning off the ability to copy/paste or print from the PDF. These options can be managed under the *File Security* settings in your *Product File* information on the DriveThru site when you upload your book. Any security settings imposed on your uploaded digital edition will cause errors during the automatic watermarking process at the point of customer check-out.

## 8. What do I do next?

Once you have finished producing and testing your digital PDF edition, you're ready to upload! Log into your account on site and go to the **TITLE MANAGEMENT** section of your Publish Menu and use the **SET UP A NEW TITLE** tool.

If you have any questions about how to proceed with filling out this form, see the **SET UP A NEW TITLE & EDIT A TITLE** link under *Digital Titles* in the **PUBLISHER KNOWLEDGE BASE** section of your Publish Menu. You will find more information there to assist you.

After a successful upload, you can choose to activate your title for live sale! How exciting!

## 9. I Need More Help!

Your publisher service rep is not really an expert on digital layout, so chances are slim that he or she will be able to answer questions not answered in this tutorial. However, please do email us your questions anyway so we can help find an answer if we can and also so that we can improve this tutorial so it answers more questions for everyone.

You can also find people with professional skills in digital layout and contract them to create your files. The cost of this work depends on how much of the work you do yourself before handing it over for layout. We can recommend someone for layout if you would like. Please contact Publisher Service for details.

Or you can also find freelance layout professionals at sites like [www.UpWork.com](http://www.UpWork.com).