Adobe Captivate 4: Beyond The Essentials

"Skills and Drills" Learning

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Adobe Captivate 4: Beyond the Essentials

"Skills and Drills" Learning

Kevin A. Siegel

iCONLOGiC

"Skills and Drills" Learning

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About This Book

About the Author

Kevin A. Siegel is the founder and president of IconLogic, Inc. He has written more than 100 step-by-step computer training books, including *Essentials of Adobe Captivate 4*, *Essentials of Adobe Captivate 3*, *Essentials of Adobe Captivate 2*, *Essentials of Macromedia Captivate*, *Essentials of RoboDemo 5*, *Essentials of RoboDemo 4*, *Essentials of RoboDemo 3*, *Essentials of Adobe RoboHelp 8 HTML, Essentials of Adobe RoboHelp 7 HTML, Essentials of Adobe Dreamweaver CS3*, *QuarkXPress 8: The Basics, QuarkXPress 8: Beyond the Basics, Essentials of QuarkXPress 7, Accelerated QuarkXPress 6* and *Essentials of Adobe InDesign CS3*.

Kevin spent five years in the U.S. Coast Guard as an award-winning photojournalist and has more than 23 years experience as a print publisher and technical writer. He is a certified technical trainer, has been a classroom instructor for more than 16 years and is a frequent speaker at trade shows and conventions. Kevin holds multiple certifications from companies such as Adobe and the CompTIA. You can reach Kevin at **ksiegel@iconlogic.com**.

About IconLogic Books

IconLogic books are unique! They are created by instructors with years of software training experience. Before IconLogic books, our instructors rarely found a book that was perfect for a classroom setting. If the book was beautiful, odds were that the text was too small to read and hard to follow. If the text in a book was the right size, the quality of exercises left something to be desired.

Finally tiring of using inadequate materials, our instructors started teaching without any books at all. Over the years, we've had many students ask if the in-class instruction came from a book. If so, they said they'd buy the book. That sparked an idea. We asked students — just like you—what they wanted in a training manual. You responded, and the results appear in this book.

We hope you enjoy the book. If you have any comments or questions, please see page viii for our contact information.

Book Conventions

This book has been divided into several modules. Since each module builds on lessons learned in a previous module, we recommend that you complete each module in succession. During every module, you will be guided through lessons step by step. Instructions for you to follow will look like this:

- ❒ instructions for you to follow will look like this

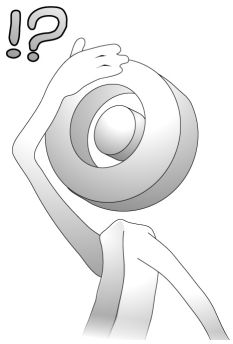
If you are expected to type anything or if something is important, it will be set in bold type like this:

- ❒ type **9** in the box

If you are expected to press a key on your keyboard, the key will be in brackets like this:

- ❒ press [**ctrl**]

Confidence Check



You will also come across the little guy at the right. He indicates a Confidence Check. Throughout each module you will be guided through hands-on exercises. But at some point you'll have to fend for yourself. That is where Confidence Checks come in. They're very important. You must be sure to complete each of them because some exercises build on completed Confidence Checks.

System Requirements

To complete the lessons presented in this book, you will need the following software and hardware: Adobe Captivate 4, Intel Pentium 4, Intel Centrino, Intel Xeon, or Intel Core Duo (or compatible) processor; Microsoft Windows XP with Service Pack 2 (Service Pack 3 recommended) or Windows Vista Home Premium, Business, Ultimate, or Enterprise with Service Pack 1 (certified for 32-bit editions); 512MB of RAM (1GB recommended); 1.5GB of available hard-disk space; additional free space required during installation (cannot install on flash-based storage devices); DVD-ROM drive; 800x600 screen resolution (1,024x768 recommended).

The Adobe Captivate 4 software does not come with this book. The software can be purchased directly from Adobe (**www.adobe.com**). You can also download a trial version of Captivate from Adobe. There are no limitations on the trial and it will last for 30 days from the day you install it on your computer.

You will also need Microsoft PowerPoint installed on your computer. If PowerPoint is not installed, you will not be able to import PowerPoint presentations into Captivate (which you will learn to do during the activities that begin on page 26).

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Data Files

The data files that support the lessons presented in this book can be downloaded from the IconLogic Web site. Instructions for downloading the data files appear below.

Student Activity: Download Data Files From the Web

1. Download the student data files necessary to complete the lessons presented in this book.

   ❒ start a Web browser
   ❒ go to the following Web address: **http://www.iconlogic.com**
   ❒ click the **Data Files for IconLogic Workbooks** link

   ❒ click the **PC** link
   ❒ find and click the **Captivate 4, Beyond the Essentials** link

   A dialog box will appear asking if you want to Save or Open the data files.

   ❒ click **Save**
   ❒ navigate to your desktop
   ❒ click **Save**

2. After the file downloads, close your Web browser.

3. Extract the data files.

   ❒ find the **Captivate4_BeyondEssentialsData.exe** file you just downloaded to your desktop
   ❒ double-click the file to open it

   The WinZip Self-Extractor appears.

   ❒ confirm **C:** appears in the Unzip to folder area
   ❒ click **Unzip**

   Several files will be extracted.

   ❒ click **OK**
   ❒ click **Close**

   The data files are now on your hard drive. As you move through the lessons in this book, you will be working with these files. When you have completed the lessons in this book, you can delete both the data folder (on the C drive) and the **Captivate4_BeyondEssentialsData.exe** you downloaded to your desktop.

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I'd like to thank Tim Lucas, John Daigle, Rick Stone, Joyce Nolan, Lorraine Smith, Kim Wendkos, AJ Barker, Barbara Ash and Janet Tonner for their hard work and support during the production of this book.

~ Kevin A. Siegel

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Module 7: Project and Design Templates

In This Module You Will Learn To

- Create a Project Template
- Create a Project From a Template
- Record Additional Slides
- Delete Unused Objects
- Create a Mask
- Add a Text Animation Placeholder
- Create a Design Template
- Format Design Template Objects
- Apply a Design Template to a Project

Project Templates

If you want to take the best components of any Captivate project and use them over and over, you can save any of your existing Captivate projects as a **project template**. The next time you create a project, you can use the project template and quickly produce a new project that contains those "best in class" components from the template.

A good project template will contain, at the very least:

- ❒ An introduction slide
- ❒ A conclusion slide
- ❒ A customized skin
- ❒ Document Info
- ❒ Variables, widgets and actions as appropriate
- ❒ Project Start and End settings

Student Activity: Create a Project Template

1. Open **TemplateMe** from the Captivate4_BeyondEssentialsData folder.

   This is a 10-slide project that has already been approved by management. Since management would like you to use this project as the basis of all projects you record in the future, you'll make the necessary changes to the project to make it a project template.

2. Delete unnecessary slides.

   - ❒ ensure you are in **Storyboard View**
   - ❒ click one time on Slide **2**
   - ❒ press [**Shift**] on your keyboard and click one time on Slide **9**

   Slides 2 through 9 should all be selected.

   - ❒ release the [**Shift**] key
   - ❒ press [**delete**]

   A confirmation box appears.

   - ❒ click **Yes**

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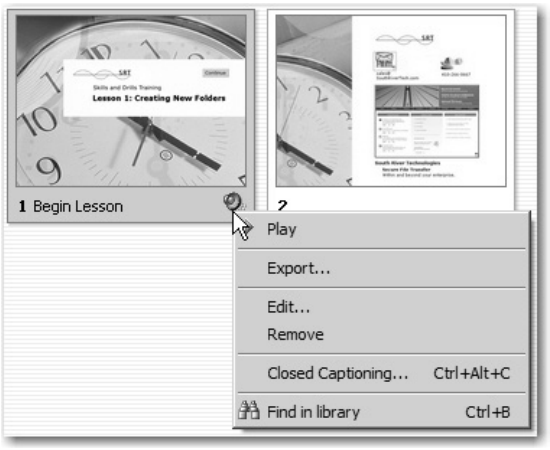
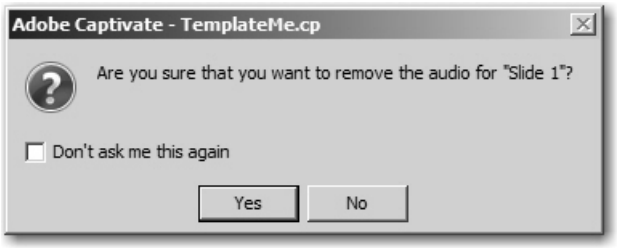
3. Delete the audio from Slide 1.

   ❒ click the **audio badge** beneath Slide 1



   ❒ click **Remove**



   ❒ click **Yes**

4. Save the project as a Project Template.

   ❒ choose **File > Save As**

   ❒ choose **Adobe Captivate Templates (*.cptl)** from the Save as type drop-down menu

   ❒ navigate to the Captivate4_BeyondEssentialsData folder

   ❒ change the File name to **My First Captivate Template**

   ❒ click the **Save** button

   Notice that the project name that appears in the title bar now includes the CPTL extension of a project template.

5. Close **My First Captivate Template**.

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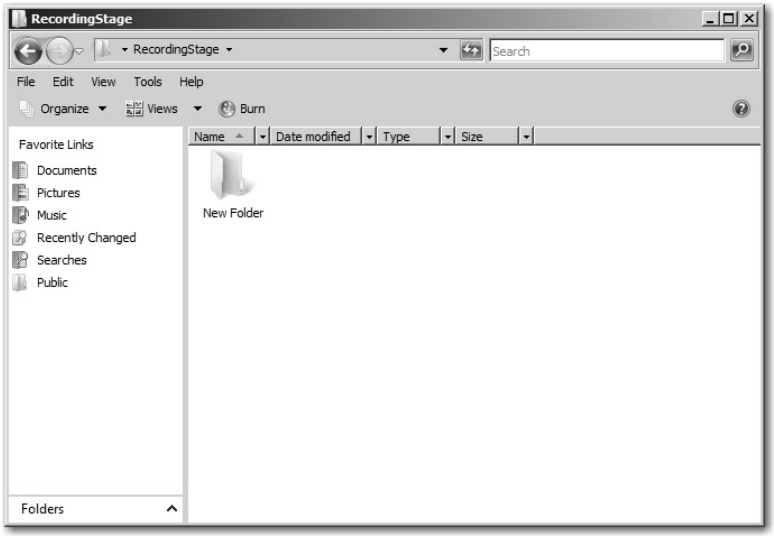
Student Activity: Create a Project From a Template

1. Minimize Captivate.

2. Using Windows Explorer, navigate to the **Captivate4_BeyondEssentialsData** folder

3. Open the **RecordingStage** folder.

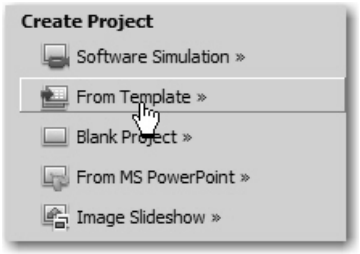
   If necessary, create a new folder inside the RecordingStage folder window (File > New > Folder).



4. Return to Captivate.

5. Create a new project that uses a project template.

   ❒ from the Create Project area on the Welcome screen, click **From Template**



   The Open dialog box appears.

   ❒ open **My First Captivate Template.cptl** from the Captivate4_BeyondEssentialsData folder

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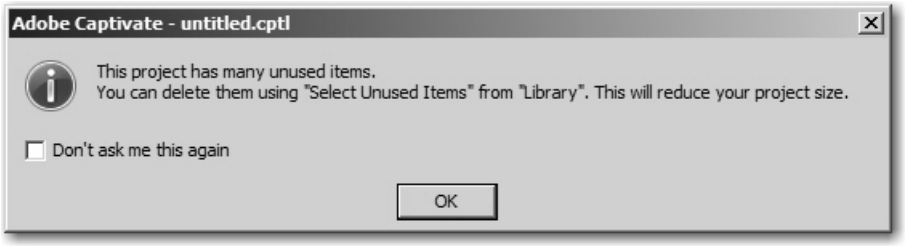
The project opens and you are alerted about unused items. You will deal with that later.



❒ click **OK**

Notice that the new project is untitled, even though you opened the template. Notice also that the project's name contains a CP extension, indicating that it is a Captivate project, not a template.

Other than the file name extension, your new project is identical to the template you created in every way and it has all of the settings of the template.

6. Save the project to the Captivate4_BeyondEssentialsData folder as **Testing My Template**. Keep the project open for the next activity.

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Student Activity: Record Additional Slides

1. The **Testing My Template** project should still be open.

2. Record additional slides to the project.

   ❒ choose **Insert > Recording Slide**

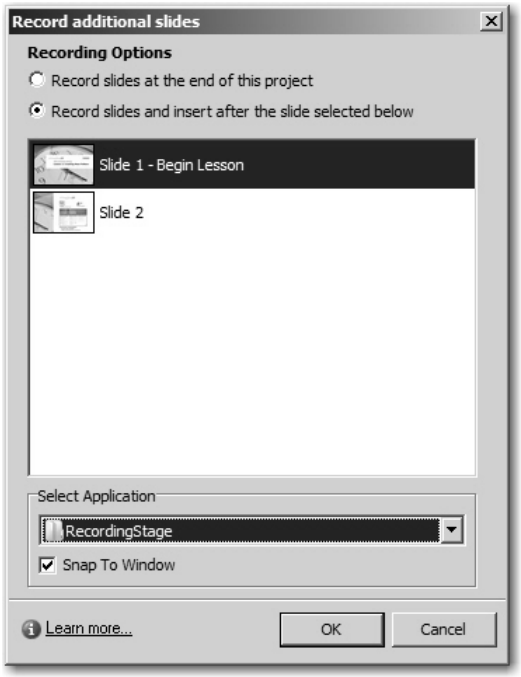
   The **Record additional slides** dialog box appears.

   ❒ if necessary, select **Record slides and insert after the slide selected below**

   ❒ select **Slide 1 - Begin Lesson**

   ❒ select **RecordingStage** from the Select Application drop-down menu

   ❒ ensure **Snap To Window** is selected



   ❒ click **OK**

   The red recording area appears with the control panel at the left.

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3. Set the recording options.

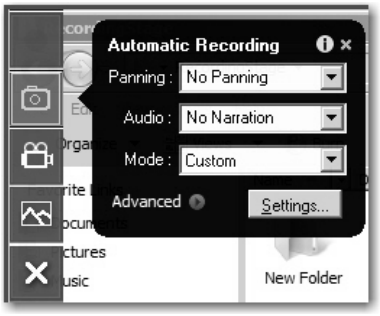
   ❒ click the **Select Automatic Recording Mode** button on the control panel

   The Automatic Recording panel appears.

   ❒ ensure Panning is set to **No Panning**

   ❒ ensure Audio is set to **No Narration**

   ❒ select **Custom** from the Mode drop-down menu

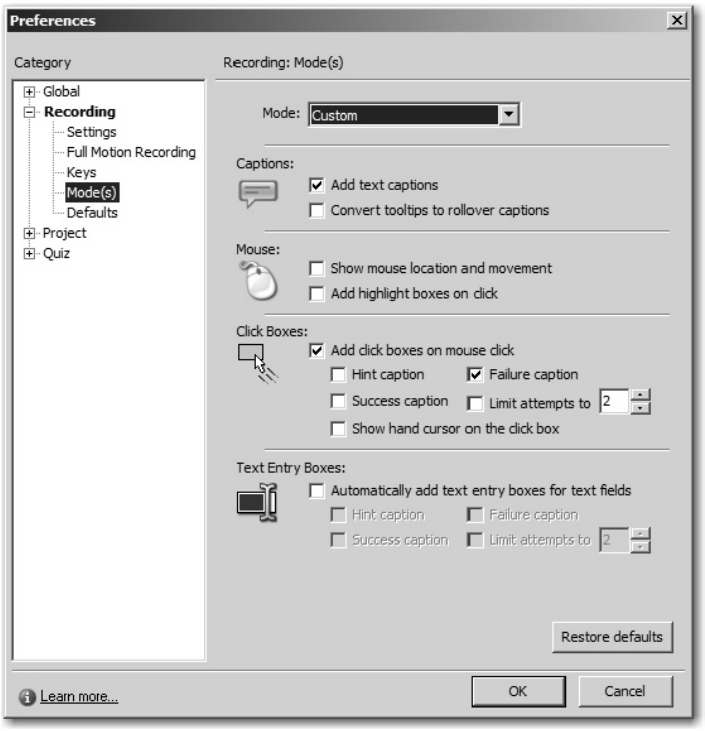


   ❒ click the **Settings** button

   ❒ from the Recording category, select **Mode(s)**

   ❒ select **Custom** from the Mode drop-down menu

   ❒ ensure your settings match the picture below



   ❒ click **OK**

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4. Record the simulation.
   - ❒ click the **Record** button
   - ❒ select the folder inside the RecordingStage window
   - ❒ choose **File**
   - ❒ choose **Delete**
   - ❒ click **Yes**
5. End the recording.
   - ❒ press [**end**] on your keyboard

   You should automatically be returned to the Captivate project; there should now be seven or eight slides in the project.
6. Close the project. There is no need to save it.

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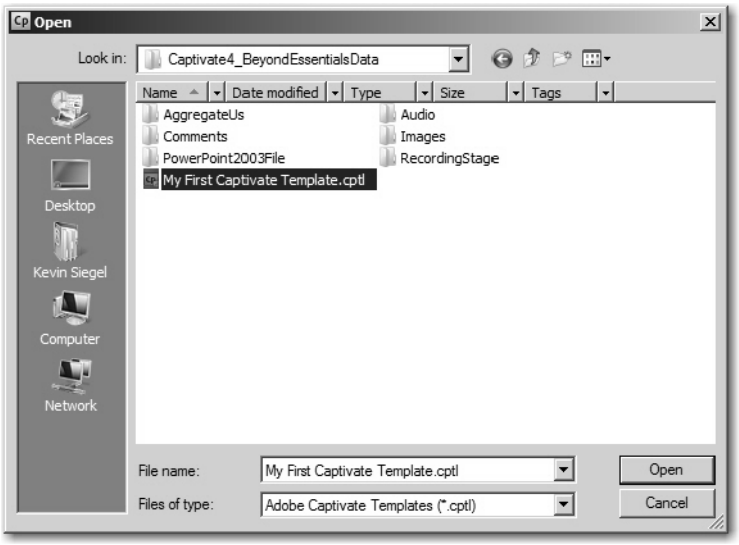
Student Activity: Delete Unused Objects

1. Open a template.

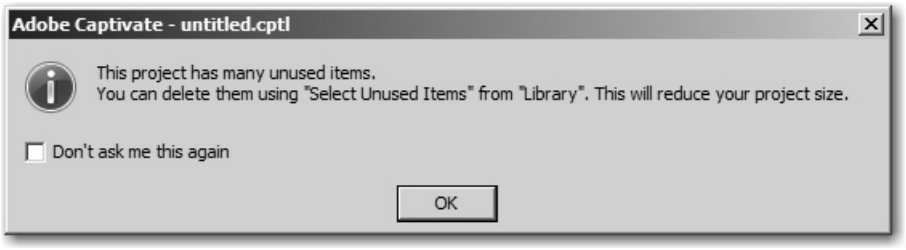
   ❒ choose **File > Open**

   ❒ select **Adobe Captivate Templates (*cptl)** from the Files of type drop-down menu



   ❒ open **My First Captivate Template.cptl**

   You are again alerted about unused items. You will deal with that pesky message now.



   ❒ click **OK**

2. Open Slide 1.

3. Show the Library.

   ❒ choose **Window > Library**

   Most of the images and all of the audio files in the Library were being used in the project that you opened when you created the template. They are no longer being used and are not necessary.

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4. Remove unused Library items.

   ❒ select the **Select Unused Items** button on the Library

   Note: If you don't see the Select Unused Items button at the top of the Library, you may need to stretch the Library panel wider.

   ❒ press [**delete**] on your keyboard

   ❒ click **Yes** to the Confirmation dialog box

   There is still a Visual Mouse Click that isn't necessary and can be deleted.

   ❒ select the **VisualClick** object from the bottom of the Library

   ❒ press [**delete**] on your keyboard

   ❒ click **Yes** to the Confirmation dialog box

5. Close the Library.

6. Save the template (keep it open for the next activity).

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Student Activity: Create a Mask

1. The **My First Captivate Template.cptl** project template should still be open.

2. Create a mask on Slide 1.

   - ❒ Go to Slide 1
   - ❒ choose **Insert > Image**
   - ❒ from the Images folder, open **WhiteBox.bmp**
   - ❒ move and resize the white box image until it completely covers the Lesson 1: Creating New Folders area of the slide background

   - ❒ right-click the white box image and choose **Merge into Background**
   - ❒ click **Yes** when prompted

3. Save the template.

   Keep the template open for the next activity.

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Template Placeholders

You can add any object to a template's slide including text captions, buttons, click boxes and highlight boxes. When you add a text caption, a typical process would be to insert some default (or placeholder) text within the text caption. Developers who create projects using your template would be expected to replace the placeholder text with actual text. At least, you would assume that your developer would replace text, such as "Replace this text with real text" with real text. However, if your developer misses the placeholder text, the project will publish with any placeholder text that is not actually replaced.

Which brings me to actual Placeholders that you can add to any slide within the template. Unlike actual objects, Placeholders do not preview or publish if they are not populated with actual content.

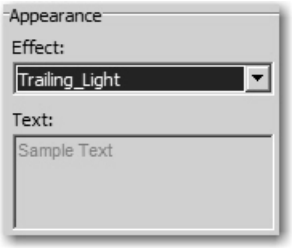
You can add Placeholders for any of the following:

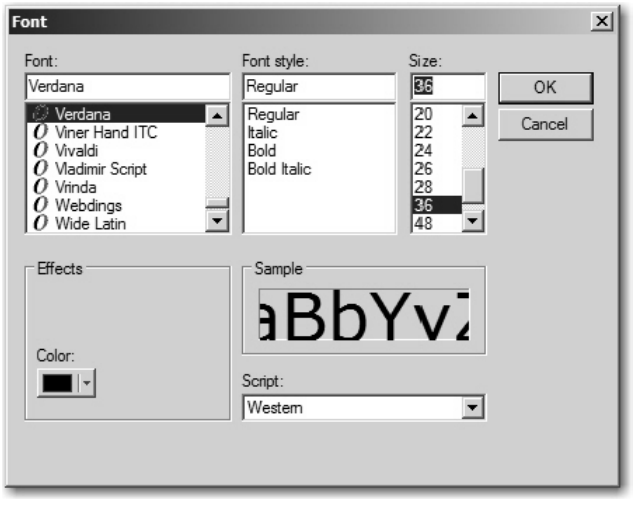
- ❒ Images
- ❒ Text Captions
- ❒ Rollover Images and/or Captions
- ❒ Flash Video, Text Animation and Animation
- ❒ Recording Slides
- ❒ Question Slides

Student Activity: Add a Text Animation Placeholder

1. The **My First Captivate Template.cptl** project template should still be open.

2. Insert a Text Animation Placeholder.
   - ❒ on Slide 1, choose **Insert > Placeholder > Text Animation**
   - ❒ on the **Text Animation Placeholder** tab, select any Effect you like from the Effect drop-down menu
   - ❒ click the **Change font** button
   - ❒ change the Font to **Verdana** and the Size to **36**





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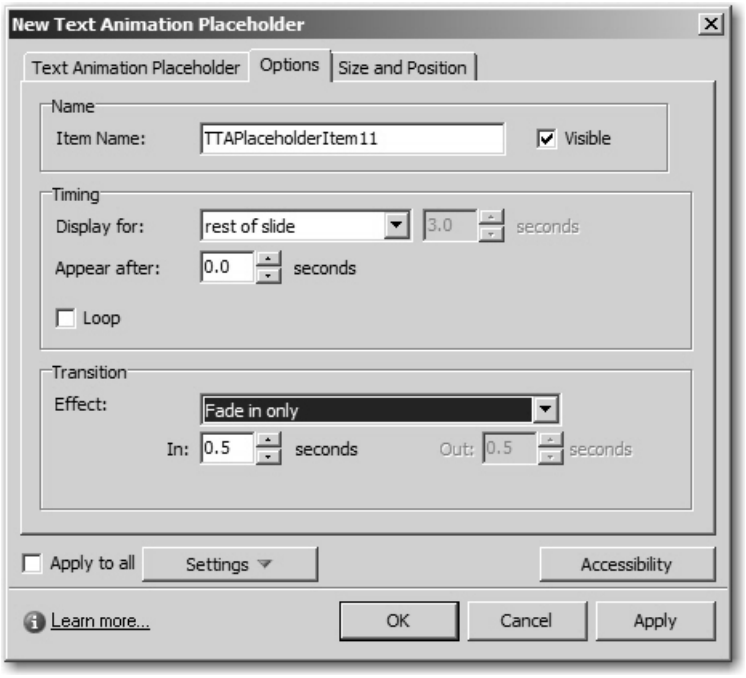
- ❒ click **OK** to close the Font dialog box (the New Text Animation Placeholder dialog box should still be open)
- ❒ select the **Options** tab
- ❒ select **rest of slide** from the Display for drop-down menu
- ❒ select **Fade in only** from the Transition Effect drop-down menu



- ❒ click **OK**

Position the Placeholder as shown below.

3. Save your work.

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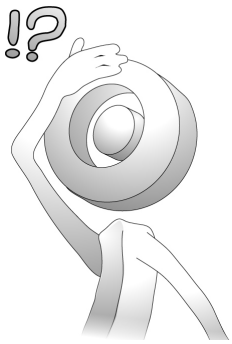
Confidence Check



1. Still working in the My First Captivate Template project template, select Slide **1** and then insert a Recording Slide **placeholder**.

2. Save and close the template.
3. Create a new project from the **My First Captivate Template** project template.

   When the template is accessed this time, the first thing you should notice is that you are not alerted about unused items.
4. Open Slide **1**.
5. Double-click the Sample Text Animation placeholder.
6. Change the words Sample Text with the phrase **Testing a Placeholder** and click **OK**.
7. Press [**F4**] to preview the project and you'll see your new text animation.
8. Close the preview.
9. Go to Slide **2** and double-click the Recording Slide Placeholder.

   The **Record slides for placeholder** dialog box appears. If you moved forward and clicked **OK**, you could record new slides that would be added to the project.

10. Click **Cancel**.
11. Close the project (there is no need to save it).

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Design Templates

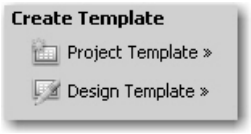
As you learned beginning on page 114, Project Templates are perfect for ensuring consistency for all new projects. When you base a new project on a template, specific properties of the new project will be pre-determined (such as the recording size, skin used, number of default slides, etc.). However, changes made to the template down the road will have no bearing on projects based on the template (there is no link between the template and its projects).

Design Templates allow you to ensure consistency of objects in existing projects. For instance, you can set up the appearance of highlight boxes in a Design Template and apply those attributes to existing Captivate projects (just in case a rogue developer has decided to use their own colors in their highlight boxes).

Student Activity: Create a Design Template

1. Create a new Design template.

   ❒ on the Captivate Welcome screen, click **Design Template** from the Create Template area

   An untitled template is created (named untitled.cpdt). The template contains seven slides.

2. Save the Design template to the Captivate4_BeyondEssentialsData folder as **yourfirstnameDesignTemplate**.

3. Explore the slides in the Design template.

   ❒ move from slide to slide and notice that just about every object you can add to a Captivate slide is represented in the template

4. Explore the menus in the Design template.

   ❒ open the menus (File, Edit, View, etc.)

   Notice that the menu items are much more limited here than in a typical Captivate project. In addition, you cannot insert any objects such as animations or text captions (there isn't even an Insert menu). And there isn't a Timeline or Library window. At first glance, there doesn't appear to be much you can do at all with this pesky template.

   Ah, but looks can be deceiving. The goal for working effectively with a Design template is to make objects in the template look the way you want. After that, it's a simple matter of applying the Design template to your existing projects.

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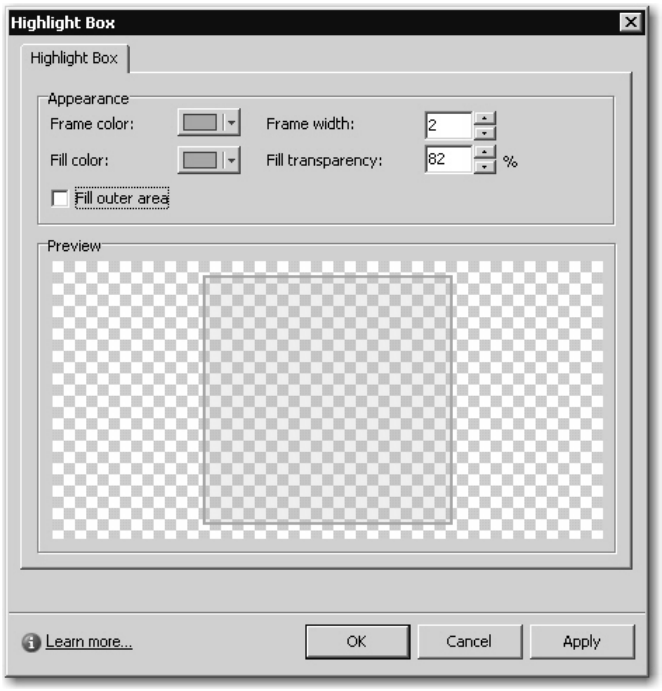
Student Activity: Format Design Template Objects

1. Your Design template should be open.
2. Format the appearance of highlight boxes within the Design template.
   - ❒ go to Slide **5** of the template

   There is a sample highlight box on the slide.

   - ❒ right-click the highlight box and choose **Properties**
   - ❒ change the Frame color to **orange**
   - ❒ change the Frame width to **2**
   - ❒ change the Fill color to **orange**
   - ❒ change the Fill transparency to **82**



   - ❒ click **OK**

3. Save your work.

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4. Format the appearance of text captions within the Design template.

   ❒ go to Slide **1** of the template

   There is a sample text caption on the slide. It's transparent and using a specific font, size and color.

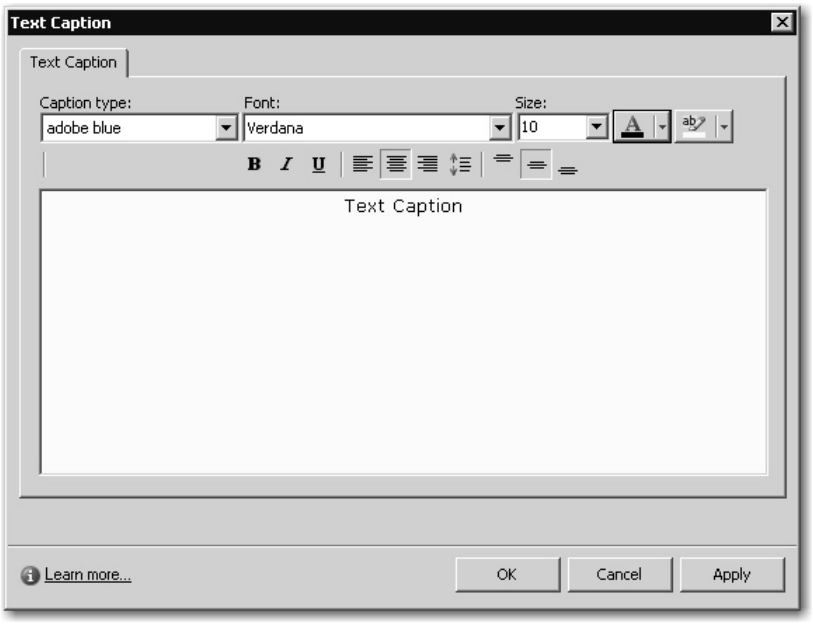
   ❒ right-click the Text Caption and choose **Properties**

   ❒ change the Caption type to **adobe blue**

   ❒ change the Font to **Verdana**

   ❒ change the Size to **10**

   ❒ change the Font color to **Black**



   ❒ click **OK**

5. Save your work.

6. Close the template.

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Student Activity: Apply a Design Template to a Project

1. Open **FixMe** from the Captivate4_BeyondEssentialsData folder.

2. Explore the project for problems.

   ❒ open Slide **2**

   The Caption Type and Font size aren't correct.

   ❒ go to Slide **3**

   The appearance of the highlight box isn't correct either. In fact, if you scroll through the project, you'll notice that none of the text captions or highlight boxes are formatted to corporate standards (specifically, both text captions and highlight boxes were supposed to use the formatting specified in the Design Template).

   In addition to the problems mentioned above, you'll see that there are "issues" in this project that go beyond an incorrect choice of caption type and highlight box colors. For instance, slides 1 and 2 contain buttons using a font that is, at best, hard to read. The failure captions on those slides with click boxes are also problematic (they're using strange fonts as well).

3. Apply the Design template to the project.

   ❒ choose **Window > Design Template**

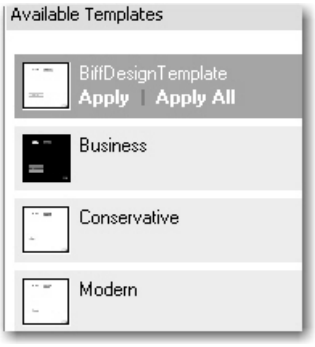
   The Design template panel appears at the right of your window.

   ❒ click the **Browse Template** button (located at the bottom of the Design Template panel)

   ❒ open the Captivate4_BeyondEssentialsData folder

   ❒ open the Design template you created earlier

   Your template appears in the Available Templates list.



   ❒ click **Apply All** from beneath your template

   The attributes of the objects in your template are applied to the slide objects in your project.

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4. Explore the project to confirm that changes have been made.

   ❒ go to Slide **2**

   The Caption Type and Font size now match those you specified in the template.

   ❒ go to Slide **3**

   The appearance of the highlight box has been fixed as well.

   Just as interesting as the changes that you might have been expecting in the FixMe project, notice that the font used in the buttons (on Slides 1 and 2), and the failure captions throughout the project have all been updated. While the appearance has been changed, the font used in those objects is Arial, the default font used in the Design template. Since you did not update those objects, the default template properties for all of the template's objects have been applied to all of the objects in the FixMe project. In the future, it would be a good idea to set all of the properties of a Design template object prior to applying the template to a project.

5. Save your work and close the project.

Confidence Check

1. Open your Design template (**File > Open**).
2. Go to Slide 3.
3. Show the Properties of the failure caption and change the Font attributes to **Verdana 10**.
4. Go to Slide 4.
5. Show the Properties of the button and change the Font attributes to **Verdana 10**.
6. Go through the rest of the template making changes as you see fit (generally speaking, the Font attributes of the objects should be Verdana 10.
7. Save and close the template.
8. Open the FixMe project.
9. On Slide 1, notice that the button's Font attributes have not been updated, even though you updated the template.
10. Go to Slide 3 and notice that the Font attributes in the failure caption have not been updated.

    While it might seem that the template isn't working, keep in mind that there isn't a live link between the project and its template. If you want the changes to appear in the project, you'll need to reapply the Design template.

11. Apply your Design template to all of the slides in your project.
12. Scroll through your slides and notice that the buttons and failure captions have updated and now match the formatting from your template.
13. Save and close the project.

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