

# **PDF information and navigation elements with hyperref, pdfTEX, and thumbpdf**

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## **Abstract**

Additional possibilities for information and navigation through paper-less on-line documents that offer the PDF format.

Start

# Subjects

- General document information hyperref
- Bookmarks/outlines hyperref
- Thumbnails thumbpdf

Full-screen

Back

Next

# General Document Information

Application: search engines.

## hyperref options:

Title: `pdftitle`

Subject: `pdfsubject`

Author: `pdfauthor`

Keywords: `pdfkeywords`

Creator: `pdfcreator`

Producer: `pdfproducer`

## Times:

Created: `/CreationDate`

Modificated: `/ModDate`

## Informations:

File name, file size

PDF version

Optimized(linearized)

# Setting the general document information

```
\usepackage{hyperref}
\hypersetup{%
    pdftitle      = {PDF information and navigation elements},
    pdfsubject    = {Slides for talk at EuroTeX'99 in Heidelberg},
    pdfkeywords   = {pdf, hyperref, bookmarks, thumbnails},
    pdfauthor     = {\textcopyright\ Heiko Oberdiek},
    pdfcreator    = {\LaTeX\ with package \texttt{hyperref}},
    pdfproducer   = {pdfeTeX-0.\the\pdftexversion\pdftexrevision},
}
\pdfinfo{/CreationDate (D:19990909000000-01'00')}
```

# PDF strings

- Examples, where PDF strings are used:  
Bookmark names, information dictionaries, text annotations
- PDF strings follow the PostScript rules:
  - Delimited by parentheses: `(This is a string)`
  - Escape sequences for white space, `\(`, `\)`, `\\"`;  
octal notation, e. g.: ‘äöüß’ = `(\344\366\374\337)`
- **PDFDocEncoding**: 8bit, superset of ISO Latin 1  
**Unicode**: 16bit, Acrobat Reader version  $\geq 4$

Full-screen

Back

Next

# Digestion of T<sub>E</sub>X

## Eyes

- Reading input lines
- Catcodes are set

## Mouth

- Forming tokens
- Expansion of macros

## Stomach

- Assignments
- Typesetting

Full-screen

Back

Next

# Differences between mouth and stomach

	<b>mouth</b>	<b>stomach</b>
“zero”:	\empty	\relax
{...}:	parameter	group
variable:	read and check	assignments
fonts:	–	different fonts and encodings ligatures
Commands:	\string, \number \if, \the	\def, \hbox, \$ \begingroup, \special

Full-screen

Back

Next

# $\text{\TeX}$ into PDF strings

- Reusing the argument of section commands ( $\text{\TeX}$  string) for the bookmarks (PDF strings).
- Limitations because of missing stomach digestion:
  - No manipulation of boxes, no mathematics, no colors, . . .
  - No change of fonts or encodings, no ligatures.
  - No assignments (`\xspace` uses `\futurelet`).
  - Unexpandable commands appear verbatim.

Full-screen

Back

Next

# Font encoding mechanism

plain-T<sub>E</sub>X: \ss = \char"19 ⇒ β

L<sub>A</sub>T<sub>E</sub>X 2<sub>ε</sub>: \fontencoding{OT1}\selectfont\char"19 ⇒ β

\fontencoding {T1}\selectfont\char"19 ⇒ i

\ss = \OT1-cmd \ss \OT1\ss ⇒ β

The font slot positions depend on the encoding:

\OT1\ss = \char"19

\T1\ss = \char"FF

\?\ss = \UseTextSymbol{OT1}\ss

\OT1\ss = \csname OT1\string\ss\endcsname

Full-screen

Back

Next

# PD1 encoding (PDFDocEncoding)

- Most names: `\text<glyph name>`

Examples:  $\textcircled{R} = \text{registered}$ ,  $\text{~} = \text{asciitilde}$

- Traditional T<sub>E</sub>X and L<sup>A</sup>T<sub>E</sub>X names.

Examples:  $\text{\AE} = \text{AE}$ ,  $\text{\ss} = \text{ss}$

- Accented characters.

Examples:  $\text{\\"U} = \text{"U}$ ,  $\text{\c{c}} = \text{c c}$ ,  $\text{\AA} = \text{r A}$  ( $\Leftarrow \text{\AA}$ )

- Escape octal sequences are the result:  $\text{\textmu} \Rightarrow \text{\265}$

Full-screen

Back

Next

# PU encoding (Unicode)

- (:,) Characters having catcodes 11 (letter) and 12 (other):  
Checking each token, high memory and time consumption.
- (:,) Ligatures: same as above.
- (:,) Direct commands:  
Easier to implement, but each command must be redefined each time.
- (;) Commands of  $\text{\LaTeX} 2_{\varepsilon}$ 's fontencoding mechanism:  
Smallest memory consumption and fastest method.  
This method is used by package hyperref.

Full-screen

Back

Next

# Examples of Unicode bookmarks

## Greek:

- +---□ 003/210..217: \_Ε\_Η\_Ι\_Ο\_Υ\_Ω\_
  - +---□ 003/220..227: \_Γ\_Α\_Β\_Γ\_Δ\_Ε\_Ζ\_Η\_
  - +---□ 003/230..237: \_Θ\_Ι\_Κ\_Λ\_Μ\_Ν\_Ξ\_Ο\_
  - +---□ 003/240..247: \_Π\_Ρ\_Σ\_Τ\_Υ\_Φ\_Χ\_
  - +---□ 003/250..257: \_Ψ\_Ω\_Ϊ\_Ϋ\_ά\_έ\_ή\_ί\_
  - +---□ 003/260..267: \_Ϊ\_α\_β\_γ\_δ\_ε\_ζ\_η\_
  - +---□ 003/270..277: \_Θ\_Ι\_Κ\_Λ\_μ\_ν\_ξ\_ο\_
  - +---□ 003/300..307: \_π\_ρ\_σ\_σ\_ι\_υ\_φ\_χ\_
  - +---□ 003/310..317: \_ψ\_ω\_ϊ\_ύ\_δ\_ύ\_ώ\_

# Cyrillic:

- Unicode high byte: 004
    - + 004/000..007: ё ъ ќ ѕ ѡ Ѫ Ѧ
    - + 004/010..017: ј љ њ Ѯ ѯ ѻ Ѥ
    - + 004/020..027: ј ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/030..037: ђ ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/040..047: ј ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/050..057: ј ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/060..067: ј ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/070..077: ђ ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/100..107: ј ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/110..117: ј ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/120..127: ј ѕ ѩ Ѱ ѱ Ѵ ѵ
    - + 004/130..137: ј ѕ ѩ Ѱ ѱ Ѵ ѵ

# \pdfstringdef converts T<sub>E</sub>X to PDF strings

Syntax: \pdfstringdef{\command}{T<sub>E</sub>X string}

1. Selecting the encoding PD1 or PU.
2. Redefinitions of many commands, so that they produce correct results or do not harm.
3. Expansion of the string.
4. Token checks and removal of forbidden tokens with comprehensive warnings.

Full-screen

Back

Next

# Redefinitions by \pdfstringdef

- Redefinitions to get correct results, e. g.:
  - Glyph commands: \{, \%, \space, \dots, . . .
  - Logos: \TeX, \LaTeX, \MF, . . .
- Many tokens are removed silently, e. g.:
  - $\text{\LaTeX}$  commands: \label, \index, \textbf, . . .
  - Stomach tokens: curly group braces, \relax (\protect), . . .
- The behaviour of \xspace is simulated.

Full-screen

Back

Next

# Bookmarks with package hyperref

- Places for options.
- Options for bookmarks.
- Creating bookmarks.
- Replacement methods.

Full-screen

Back

Next

# Places for hyperref options

1. Global: `\documentclass[...]` (e.g. driver)
2. Package: `\usepackage[...]`
3. Configuration file: `hyperref.cfg` with `\hypersetup`
4. After package has been loaded: `\hypersetup{...}`  
(e.g. PDF information options)

Full-screen

Back

Next

# Bookmark options

`bookmarks`: Make bookmarks (default: `true`).

`bookmarksnumbered`: Put section numbers in bookmarks (`false`).

`bookmarksopen`: Open up bookmark tree (default: `false`).

`bookmarksopenlevel`: Level, to which bookmarks are open.

`pdfpagemode`: How document starts when opened (default: `None`):

`None`: Neither outlines nor thumbnails are visible.

`UseOutlines`, `UseThumbs`: Outlines, thumbnails are visible.

`FullScreen`: Full-screen mode.

`unicode`: Bookmarks in Unicode (`false`). After package has been loaded, it switches between Unicode and PDFDocEncoding.

Full-screen

Back

Next

# Bookmarks by section commands

- Automatically addition of bookmarks by:
  - \part, \chapter, \section, \subsection, . . .
  - \addcontentsline
- Help file `\jobname.out`:
  - It is written in the **first** run.
  - The bookmarks are set in the **second** run.
  - There is **no** “rerun” warning.

Full-screen

Back

Next

# Tree structure of bookmarks

- Subentries must be added to direct ancestors, not grandparents.
- If an intermediate level is omitted, the leaf starts leftmost:

	table of contents	bookmarks
\part{I}	Part I	main entry
\chapter{5}	→Chapter I.5	→subentry
\subsection{1}	→→→Subsection I.5.0.1	main entry

Full-screen

Back

Next

# Creating bookmarks with \pdfbookmark

- The bookmarks of section commands have an **level** number:

documentclass	\part	\chapter	\section	\subsection	...
book/report:	-1	0	1	2	...
article:	0		1	2	...

- Syntax of **\pdfbookmark** (default for level: 0):

**\pdfbookmark[*level*]{*bookmark text*}{*anchor name*}**

- **\currentpdfbookmark**{*bookmark*}{*anchor*}% current level
- **\subpdfbookmark**{*bookmark*}{*anchor*}% current level + 1

# Using anchors with \pdfbookmark

- An anchor name consists of the argument and the level:

```
\pdfbookmark[0]{Titlepage}{tit}% anchor: tit.0
```

- The bookmark can point to another target (anchor):

```
\hypertarget{place.1}{}{}
```

Redirecting the bookmark to the previous defined target:

```
\begingroup
  \makeatletter
  \def\hyper@anchorstart #1\hyper@anchorend{}%
  \pdfbookmark[1]{Go to the place}{place}%
\endgroup
```

Full-screen

Back

Next

# Replacement methods

- `\texorpdfstring` chooses one of its arguments:  
a T<sub>E</sub>X or a PDF string.
- `\pdfstringdefPreHook` is a place for redefining commands.  
Additions are made by `\pdfstringdefDisableCommands`.
- Package `hypbmsec` extends the `\section` commands.

Full-screen

Back

Next

## **\texorpdfstring method**

Syntax: \texorpdfstring{TEX string}{PDF string}

Example:

```
\section{\texorpdfstring{H$_2$O}{Water}}
```

Full-screen

Back

Next

# Hook for private macro redefinitions

- `\pdfstringdefPreHook` is called, before expanding the string.

- `\pdfstringdefDisableCommands` adds user redefinitions to  
`\pdfstringdefPreHook`

```
\pdfstringdefDisableCommands{%
    \renewcommand{\textcolor}[1]{#1}%
    \renewcommand{\url}{\pdfstringdefwarn{\url}}%
    \let\textcolor\@gobble
}
```

- `\pdfstringdefwarn` prints a warning message.

Full-screen

Back

Next

# Package hypbmsec

- The syntax of \section commands is extended:
  - Second optional bookmark argument.
  - Bookmark in parentheses.
- Syntax:  
 $\backslash\text{section}\left\{ \textcolor{green}{toc/\text{head}}=\textcolor{red}{bookmark}=\textcolor{blue}{text}\right\}$   
 $\backslash\text{section}\left[ \textcolor{green}{toc/\text{head}}=\textcolor{red}{bookmark}\right]\left\{ \textcolor{blue}{text}\right\}$   
 $\backslash\text{section}\left[ \textcolor{green}{toc/\text{head}}\right]\left[ \textcolor{red}{bookmark}\right]\left\{ \textcolor{blue}{text}\right\}$   
 $\backslash\text{section}\left( \textcolor{red}{bookmark}\right)\left\{ \textcolor{green}{toc/\text{head}}=\textcolor{blue}{text}\right\}$   
 $\backslash\text{section}\left[ \textcolor{green}{toc/\text{head}}\right]\left( \textcolor{red}{bookmark}\right)\left\{ \textcolor{blue}{text}\right\}$   
 $\backslash\text{section}\left( \textcolor{red}{bookmark}\right)\left[ \textcolor{green}{toc/\text{head}}\right]\left\{ \textcolor{blue}{text}\right\}$

Full-screen

Back

Next

# **Additional features of PDF format**

Hyperref does not support all possibilities of PDF format, e. g.:

- `/CreationDate` and `/ModDate`.
- Bookmarks with other functions.

The following examples uses commands of pdfTEX.

Full-screen

Back

Next

# Bookmarks with other functions

- Menu functions of AcrobatReader, sound, video, . . .
- pdfTEX low level command:

`\pdfoutline action count n {text}`

- The absolute value of *n* is the count of the direct subentries.
- If *n* is negative, the subentries are closed.

Full-screen

Bookmarks

Page Only

Back

Next

# Link to external file

The PDF specification contains the possible actions on page 96.  
At last a bookmark that points to that page:

\pdfoutline

```
user {<</S /GoToR /F (pdfspec.pdf) /D [95 /Fit]>>}  
count 0 {Description of actions}
```

Full-screen

Bookmarks

Page Only

Back

Next

# Thumbnails

- Another method for navigation:
  - Choosing pages.
  - Selecting page areas.
- Contents:
  - Thumbnail sketches of the pages.
  - Other pictograms, symbols, . . .
  - Empty.

[Full-screen](#)

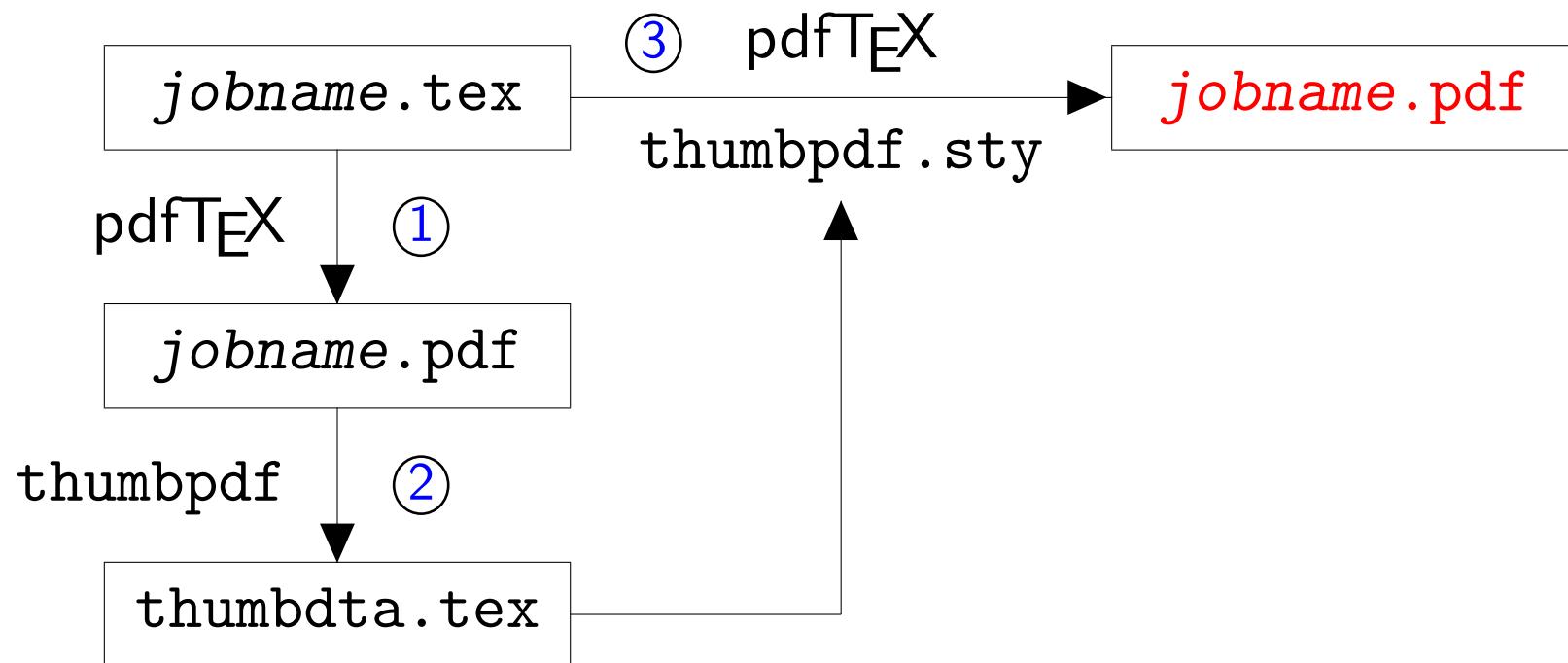
[Thumbnails](#)

[Bookmarks](#)

[Back](#)

[Next](#)

# Adding thumbnails with thumbpdf



# How thumbpdf works



Full-screen

Thumbnails

Bookmarks

Back

Next

# Other images as thumbnails

- With `\thumb` other images are declared as thumbnails in the optional file `thumbopt.tex`.
- `\thisthumb` sets the thumbnail for the current page.

`thumbopt.tex`

`\thumb{one}`

`\thumb{one.png}`

`\thumb[two]{one}`

`\thumb[one]{./extras/one.png}`

*jobname.tex*

`\thisthumb{one}`

`\thisthumb{one.png}`

`\thisthumb[two]`

`\thisthumb{one}`

# Summary

- General document information:
  - Options in `\hypersetup` after `\usepackage{hyperref}`.
- Bookmarks:
  - Automatically added by `hyperref`.
  - Oral expansion, no stomach commands (exceptions).
  - Replacement methods: `\texorpdfstring`,  
`\pdfstringdefDisableCommands`, and `hypbmsec`.
  - Low level commands only for special effects.
- Thumbnails: Automatically added by `thumbpdf`.

Full-screen

Back

Next

# Links

- PDF specification (version 1.3):

<http://partners.adobe.com/asn/developer/PDFS/TN/PDFSPEC.PDF>

- pdfTEX: (Hàn Thế Thành):

<http://www.tug.org/applications/pdftex/>

Win32: <ftp://ftp.ese-metz.fr/pub/TeX/win32-beta/>

- hyperref (Sebastian Rahtz):

ftp:

[//ftp.ctan.org/tex-archive/macros/latex/contrib/hyperref/](http://ftp.ctan.org/tex-archive/macros/latex/contrib/hyperref/)

Test versions:

<http://www.tug.org/applications/hyperref/hyperref.zip>

- hypbmsec (Heiko Oberdiek):

ftp:

[//ftp.ctan.org/tex-archive/macros/latex/contrib/oberdiek/](http://ftp.ctan.org/tex-archive/macros/latex/contrib/oberdiek/)

- thumbpdf (Heiko Oberdiek):

[ftp://ftp.ctan.org/tex-archive/support/thumbpdf/](http://ftp.ctan.org/tex-archive/support/thumbpdf/)

Full-screen

Bookmarks

Quit

Back

Next

# Reusing of informations

Using of data that are available in `\maketitle`.

**Caution:** This only works before the first page is shipped out.

```
\newcommand{\org@maketitle}{}% LATEX-Check  
\let\org@maketitle\maketitle  
\def\maketitle{%
    \hypersetup{
        pdftitle={\@title},
        pdfauthor={\@author}
    }%
    \org@maketitle
}
```



Full-screen

Back

Next

## Tasks of encoding command `\OT1\ss`

- In a protected environment it expands to `\noexpand \ss`.
- Warning, if used in math mode.
- The character (`\OT1\ss = \char"19`) is set, if the currently active encoding matches.
- Else the value of the default encoding (`\?\ss`) is used (`\?\ss = \UseTextSymbol{OT1}\ss`).

# Bookmarks by \addcontentsline

- `\addcontentsline` also adds a bookmark entry:

```
\section*{Starred section}  
\addcontentsline{toc}{section}{Starred section}
```

- For the link the last valid target (destination) is used.
- If there is a warning “`contentsline with no destination`”, a dummy target can be created:

```
\newcounter{dummy}  
\begin{document}  
  \refstepcounter{dummy}  
  \addcontentsline{toc}{section}{Contents}
```

Full-screen

Back

Next

# Definition of \texorpdfstring

- \pdfstringdef sets a switch \ifHy@pdfstring.
- \texorpdfstring is full expandable:

```
\newcommand*{\texorpdfstring}{%
    \ifHy@pdfstring
        \expandafter\@secondoftwo
    \else
        \expandafter\@firstoftwo
    \fi
}
```



Full-screen

Back

Next

# Examples for \texorpdfstring

Syntax: \texorpdfstring{\textcolor{red}{T<sub>E</sub>X string}}{\textcolor{blue}{PDF string}}

```
\section{Pythagoras:  
  \texorpdfstring{$ a^2 + b^2 = c^2 $}{%  
    a\texttwosuperior\ + b\texttwosuperior\ =  
    c\texttwosuperior\} %  
}  
\section{  
  \texorpdfstring{\textcolor{red}{}}{\textcolor{blue}{Red}} Mars%  
}
```

Full-screen

Back

Next

# Properties of hypbmsec

- Should work with packages that do not change the syntax of the `\section` commands. `hypbmsec` should be loaded **last**.
- Works **without** `hyperref` (bookmark argument is ignored).
- Parameter delimiters inside the optional parameter are protected by **curly braces**:

`(...({})...)` or `[{...}[...]{...}]`

Full-screen

Back

Next

# General document information

Example for setting `/CreationDate` and `/ModDate`:

```
\pdfinfo{/CreationDate (D:19990909000000-01'00')}
\begin{group}
  \def\twodigits#1{\ifnum#1<10 0\fi\the#1}%
  \count0=\time \divide\count0 by 60
  \edef\x{\twodigits{\count0}}%
  \multiply\count0 by 60
  \count1=\time \advance\count1 by -\count0
  \edef\x{\x\twodigits{\count1}}%
  \edef\x{/ModDate (D:\the\year
    \twodigits\month \twodigits\day \x 00-01'00)}%
\end{group}
\expandafter\end{group}
\expandafter\pdfinfo\expandafter{\x}
```

Full-screen

General document information

Back

Next

# Example for “Named Actions”

```
\newcommand{\bmaction}[3] [0] {%
  \begingroup
    \pdfstringdef\x{#3}%
    \pdfoutline
      user {<< /S /Named /N /#2 >>}
      count #1 {\x}%
  \endgroup
}
\bmaction[-3]{NOP}{Navigation}
\bmaction[2]{FullScreen}{Full-screen}
  \bmaction{PageOnly}{Page only}
  \bmaction{ShowThumbs}{Thumbnails}
\bmaction[6]{NOP}{Selecting pages}
  \bmaction{PrevPage}{Previous page}
  ...
```

[Full-screen](#) [Back](#) [Quit](#)