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An Approach to Adding Simple Interactivity to PDFs to Enhance Evaluation Products and Practice

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About this Report

This paper has interactive components, including the navigation bar at the top of each page, Figures 1-3, and hyperlinks. To access all interactive material, the paper should be viewed on a computer using Adobe Reader.

Background

We find ourselves in an era with growing interest in using data to make judgments and evaluate situations in the world around us. As the demand for data to inform decision making has increased, so has the demand for visualizations to represent those data and for more concise written evaluation reports than were traditionally provided in the past. These trends require evaluators to use varied approaches to sharing data in meaningful and useful ways, each designed to meet the needs of specific audiences or purposes.

Historically, written reports were the primary method to share evaluation results. However, lengthy technical reports have limited evaluators' ability to meet the needs of diverse audiences. Evaluators have increasingly relied on a wider array of approaches to present information, such as data visualizations, visual reports, dashboards, or in-person presentations, just to name a few.[1] Expectations of written reports have also evolved to include increased use of data visualization, more concise reports, and more frequent use of electronic formats as the primary method of dissemination.

To adapt to these more visual, concise approaches, evaluators increasingly must consider ways to succinctly present data as a part of their everyday evaluation practice. As Shneiderman proposed in his "Visual Information-Seeking Mantra," information should include "overview first, zoom and filter, then details-on-demand."[2] To follow this mantra, evaluators can make choices about how they present their information with the reader in mind. For instance, organization and emphasis can make information more accessible to a reader, increasing the likelihood of understanding, engagement, and retention.[3]

One way evaluators have met the call for "details-on-demand" is by sharing information in interactive and dynamic formats.[4] Static visualizations and reports present a single perspective of data and may be appropriate when multiple dimensions are not needed or wanted. However, several static views are often required to present multiple dimensions of the same information, for example time and space. Adding interactivity to static visualizations, reports, and other evaluation products allows the author to give multiple perspectives or layers of detail to data, supporting data analysis and communication of the findings. For example, simple interactivity in data visualizations can promote engagement with the data

by helping evaluators and stakeholders to see patterns and relationships, pose new questions, and explore trends.[4,5] Adding interactivity to evaluation products can give an overview of the data and allow users to drill down or obtain more details from the data or reference, addressing concerns of different audiences simultaneously. This also has the potential to support engagement of key stakeholders throughout the evaluation process.

An increasing number of tools are available to create both static and dynamic data visualizations and products (e.g., Tableau, Visual.ly, Many Eyes, Google Charts). However, many interactive approaches are strictly web-based (e.g., HTML, JavaScript, Adobe Flash), are often costly and time consuming to develop, and may require the end user to have specialized technology. Dynamic, web-based approaches also require expertise and resources to continuously maintain and host the information. Evaluators often work on efficient budgets and quick timelines, limiting their ability to use some of the web-based approaches currently available. Some web-based platforms also require that the data be shared publicly, which may not be possible for projects that include more sensitive or identifiable data. Web-based approaches continue to be important, particularly when manipulation of the data is desired. However, even as approaches to sharing evaluation findings have evolved, a written report or summary continues to be an important medium for communicating evaluation results. Evaluators need low-cost ways to quickly and efficiently add interactivity directly to written evaluation products.

To address the growing use of and demand for interactive electronic products, the authors sought an approach to add interactivity that was accessible to a wide variety of stakeholders, not overly resource- and time-intensive to develop, and allowed the audience to interact seamlessly with the data. In this article, the authors highlight one method of adding simple interactivity to portable document files (PDFs), including any document type that has been converted to a PDF (e.g., written report, data visualizations). The authors demonstrate interactivity to activate pop-up boxes, reveal and hide information, and navigate within the document. Adding simple interactivity into PDFs is an attractive and viable option for many evaluators because PDFs are still a common format for sharing evaluation findings and other documents with a wide range of stakeholders. PDFs offer a compact, cross-platform file format for electronic distribution. Once created, simple interactivity can be viewed by anyone with a PDF reader program, many of which are available for free download. PDFs are also an attractive format for clients that may not have a reliable and fast internet connection, which would be required for web-based options. Adding even simple interactivity to electronic evaluation products can enhance understanding and usefulness of data throughout the evaluation process.

Method

Overview of the Approach

In the examples that follow, the authors demonstrate three types of simple interactivity that can be added to PDFs, including embedding pop-up boxes, actions to "show and hide" information within visualizations, and navigation. For each type of interactivity, the authors provide one to two examples of its application to highlight the advantages of adding simple interactivity, how the approach can be used at different stages of evaluation, and how it can be used to support stakeholder engagement and understanding.

The authors used Adobe InDesign to add interactivity. Other software programs, such as Adobe Acrobat Pro and Adobe Acrobat Standard, can also be used to add certain types of interactivity to PDFs. Importantly, the free version of Adobe Acrobat, Adobe Reader, does not include the ability to add interactivity, even though it can be used to view interactive PDFs. However, Acrobat Pro, Acrobat Standard, and InDesign are all available in a variety of pricing structures (e.g., one-time, month-by-month, or annual) that make adding interactivity accessible for most evaluation budgets. For evaluators that may be more comfortable or familiar with creating evaluation products in certain programs

(e.g., Microsoft Word or Excel, SPSS), Adobe Acrobat offers the flexibility to add interactivity to any file saved as a PDF, including those created elsewhere. Alternatively, Adobe InDesign allows the creator to seamlessly add simple interactivity while creating and modifying the document. It also allows evaluation products developed outside of InDesign (for example, in Adobe Illustrator, which offers more customization options) to be placed into InDesign and enhanced with simple interactive elements. Both Acrobat and InDesign offer a number of interactive features that can be added to PDFs. For example, clickable "buttons" that perform specific actions when activated, hyperlinks, and fillable form fields, can all be added to PDFs.

The authors created the interactivity demonstrated below by adding buttons to static evaluation products. Buttons can perform a variety of simple actions. For example, buttons can show or hide objects (e.g., pop-up boxes, certain parts of a visualization), navigate to other pages of the document, navigate to external web pages, play a sound or video, or print the document. The creator can choose buttons to activate when the user either hovers over or clicks on the button. Button interactivity can be viewed in most PDF readers. Adding button interactivity to PDFs is a quick and easy way to make electronic evaluation products interactive. The time required to add interactive buttons depends on the complexity of the interactivity (e.g., how many interactive elements will be added). The time needed to add the interactive elements described in the examples below varied from 15 minutes to several hours.

The authors demonstrate three action types in the examples below, creating buttons that the user interacts with to activate a pop-up text box, show and hide information, or add navigation options. Pop-up boxes provide additional details-on-demand while still providing a clear overview of the information without adding extra length to the report or summary. Applying show-and-hide features to evaluation products allows the user to filter and make visible only certain parts of a visualization at a time. Navigation features allow the reader to easily navigate within a document (e.g., to appendices) or to an outside resource (e.g., website), with the click of a mouse. The user can interact with Figures 1-3 below by clicking on the orange information icons or orange text within each figure.

Pop-up Box Interactivity

Although most commonly used to share or communicate results, evaluation products can be helpful in every step of the evaluation process, including: evaluation planning,[4,6] data collection,[4] data analysis,[4-6] and communicating or reporting findings.[4-6] Below, the authors describe two applications of adding pop-up boxes to evaluation products, each at a different stage of the evaluation process, to demonstrate how the approach could enhance understanding and engagement.

Pop-up Interactivity: Application one

Evaluators often help key stakeholders engage with and understand data, processes, and/or programs.[4] Evaluators, like many others, rely more and more on data visualizations, reports, and other products to facilitate this engagement and understanding. During the evaluation planning phase, adding interactivity provides "multiple levels of understanding that begin with the broadest perspective and can end at the most detailed," helping stakeholders:

- Gain additional insights into a program;
- Encourage discussion; and
- Set priorities.[4]

In the first example, the authors added pop-up boxes to a common evaluation product, a logic model. Logic models are often used in the evaluation planning phase to gain insights about a program and link activities with intended outcomes. Pop-up boxes could be added to any element of a logic model to embed additional details or different levels of understanding. The additional details provided in the pop-up box should be tailored to meet the needs of the audience but could include information about the outcomes, measures, or indicators.

Figure 1: Using pop-up boxes to link project outcomes to metrics or objectives

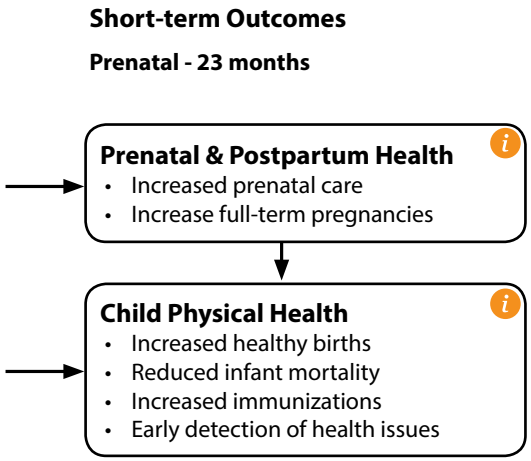


Figure 1 provides a snapshot of a few short-term outcomes from a sample program logic model. Simple interactivity was added so that a pop-up box appears when the user clicks on the orange information icon in the short-term outcome box. The pop-up box for the *Prenatal and Postpartum Health* outcome could be used to engage stakeholders in discussions around metric identification, data collection approaches, and existing evaluation capacities. Pop-up boxes can also be used to demonstrate the results of evaluation planning activities, as in the *Child Physical Health* outcome, where annual goals related to that specific short-term outcome are identified. These additional details can enhance evaluation planning by making explicit the connections between the intended outcomes documented in the program logic model and the specific annual goals set by the program.

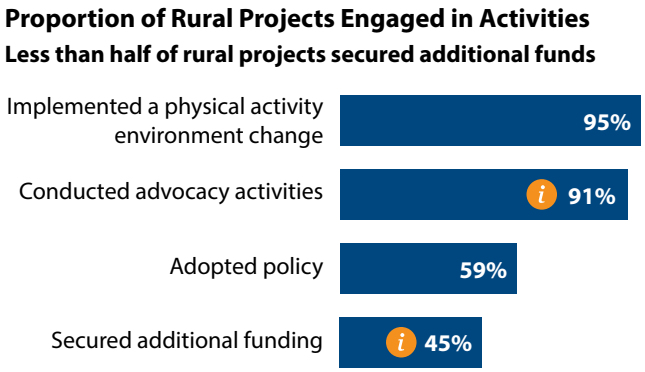
Pop-up Interactivity: Application two

When communicating or reporting findings, evaluation products tell a story about the data and help the user draw conclusions.[4,7,8] During the reporting phase of an evaluation, adding interactivity to evaluation products can:

- Allow audiences to examine details while keeping the big picture in perspective;
- Engage stakeholders in the evaluation process;
- Increase transparency;
- Assist with interpretation of data; and
- Increase stakeholders' capacity to understand the data.[4]

In this second pop-up box example, the authors added simple interactivity to a data visualization to reveal supporting information or examples. Specifically, the authors added interactive information icons and pop-up boxes to a bar chart depicting information about project activities. The pop-up boxes provide additional details-on-demand. Figure 2 depicts a bar chart highlighting the proportion of rural projects that conducted certain project activities. As in the first example, the specific contents of a pop-up box can be tailored to the needs of the audience. When the user clicks the orange information icon in the *Conducted advocacy activities* bar, details about what project activities were conducted appear in a pop-up box. Including additional information in visualizations increases transparency between the author and the audience, allows the audience to evaluate the author's credibility, and allows the audience to formulate their own conclusions. Using pop-up boxes to reveal additional information also provides concrete examples, giving context to the data and making it easier to understand.[9]

Figure 2: Using pop-up boxes to connect quantitative data with project-specific examples or qualitative data



Alternatively, when the user clicks on the orange information icon in the *Secured additional funding* bar, a quote from an interview with project staff is revealed. This provides a unique opportunity to layer qualitative data into an otherwise quantitative visualization. Adding a pop-up box with a quote from an interview allows the author to convey qualitative information in an easy-to-read format and supplement quantitative data while still preserving the richness of text data. The pop-up box offers a real-world example, from the perspective of the participants, and shows how the author triangulated different sources of data. Adding simple interactivity to data visualizations may be particularly helpful when drawing from multiple data sources or using mixed-methods evaluation approaches.

Show-and-Hide Interactivity

Another type of interactivity that can be added to PDFs is show-and-hide interactivity, which allows the creator to hide certain elements of an evaluation product, often a data visualization, while showing others. Adding these types of features may be particularly helpful in the analysis stage of the evaluation process. Adding simple interactivity to evaluation products at this stage can help the audience more easily see connections and isolate patterns among the data by highlighting specific variables or subgroups.[4] For example, adding show-and-hide interactivity to evaluation products at this stage can be used to:

- Explore relationships;
- Connect different pieces of information; and
- Identify deviations, patterns, and reoccurring themes.

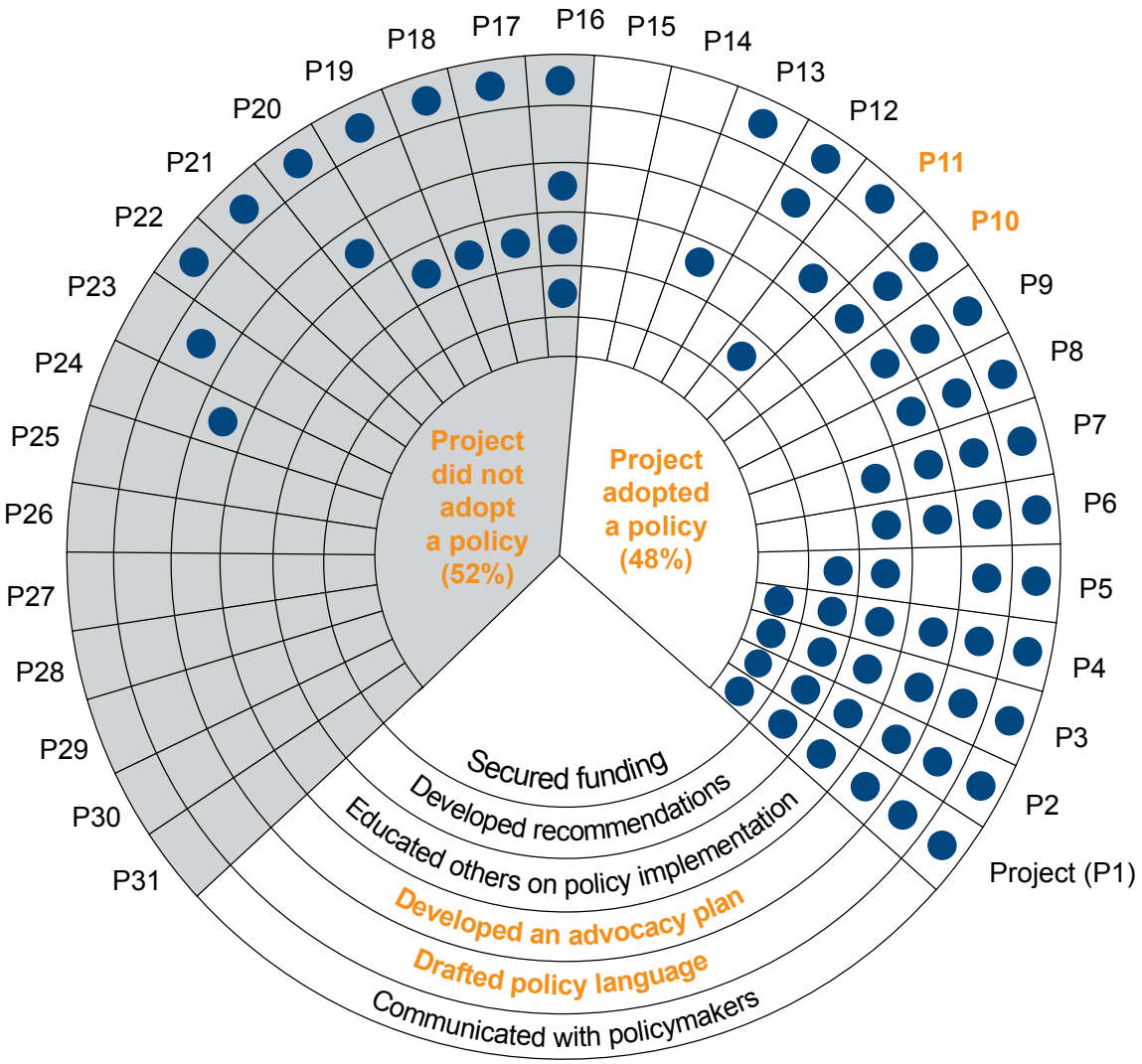
Below, the authors describe one application of adding show-and-hide interactivity to a data visualization, to demonstrate how the approach could enhance data analysis and interpretation.

Show-and-Hide Interactivity: Application one

In the example below, the authors added simple interactivity to a visualization type known as a spectrum display to isolate data for specific variables or cases (see Slone, 2009, for more on spectrum displays). The spectrum display in Figure 3 plots 31 different projects (e.g., P1 through P31) on a circle and groups them by whether or not the project adopted a policy. At the bottom of the circle are a number of variables or activities that projects could have conducted. For every instance a project conducted an activity, they got a dot.

The authors converted some of the text in the display into interactive buttons that hide or filter out portions of the data when the user hovers over the orange text. For example, the user can hover over the text *Project did not adopt a policy* or *Project adopted a policy* to filter by a subgroup of cases. The user can also hover over *Developed an advocacy plan* or *Drafted policy language* to

Figure 3: Using show-and-hide interactivity to filter by subgroup, variable, and case



filter by these two variables in the bottom of the display. Finally, the user can hover over *P11* or *P10* to filter by project cases. Creating show-and-hide interactive features like these enhances the user's ability to isolate information and identify trends by allowing the user to drill down and identify patterns that may otherwise be difficult to see in a complex graphic. This approach can also be used to facilitate discussions with stakeholders about why certain trends may or may not exist.

While not demonstrated in this example, other elements of the visualization could also be interactive. For example, the remaining variables at the bottom of the display (e.g., *Secured Funding*, etc.) and the remaining project cases around the outside of the display (e.g., *P18*, *P19*, etc.) could also be interactive. Other kinds of interactivity could also be added to this visualization. For instance, pop-up boxes could be added to the spectrum display in Figure 3 to provide specific examples of activities, additional project information, or qualitative data (e.g., quotes from interviews with project staff) that support the quantitative data displayed. This supporting information could enhance analysis by reinforcing themes or prompting new questions.

Navigation Interactivity

The final type of interactivity described here is external and internal navigation. External navigation allows the user to access additional information outside of the document. External navigation could be added by including a hyperlink to an external website, or by embedding a hyperlink in a visual element, such as an information icon. For instance, an evaluation report might include a link to a toolkit for implementing a recommendation of the evaluation. Internal navigation allows the user to move easily within the document. Internal navigation could be added as a clickable table of contents, cross-references to specific pages, or, as depicted in the example below, a navigation bar along each page that allows the reader to move between major sections of the document.

Adding navigation is particularly useful during the reporting phase of the evaluation process. Adding navigation to products that communicate evaluation findings allows the audience to:

- Make connections across sections of the report, supporting analysis and understanding;
- Access supporting documentation or evaluation data, increasing stakeholders' capacity to understand findings; and
- Access information on implementation strategies, increasing stakeholders' capacity to act on recommendations.

It is important to note that Adobe offers multiple ways to add external and internal navigation to documents. The method depicted in the example below adds navigation by creating buttons, but navigation can also be added directly to text as hyperlinks or cross-references. These methods work well for text-based navigation, such as creating an interactive table of contents. However, using buttons allows navigation interactivity to be added to any element in a report, including shapes, icons, images, or visualizations. With this flexibility, evaluators can add visual emphasis to navigation beyond simple text, such as the navigation bar illustrated in this paper.

Navigation Interactivity : Application one

In the example below, the authors added a navigation bar to an evaluation report that includes buttons to navigate to each of the report's major sections. Figures 4A-4B show screenshots of the navigation bar. The authors converted each box into an interactive button. When the user clicks the box, they are taken to the first page of that section. Figure 4A shows the navigation bar before a section is selected. Figure 4B shows how the bar appears when the user selects a specific section of the report. As the user continues to move through

Figure 4A: Sample internal navigation bar for an evaluation report

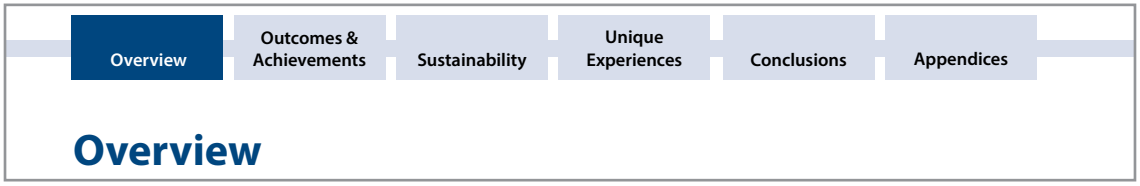
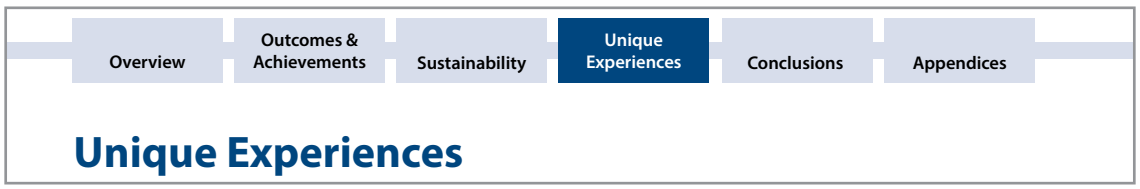


Figure 4B: Using navigation interactivity to move to another section of an evaluation report



the section, the box in the navigation bar remains highlighted in a different color. The user always knows which section they are reading and where they are in the overall report. To interact with a live navigation bar, click on the tabs at the top of each page in this paper.

Discussion

Although adding simple interactivity to evaluation products can enhance evaluation practice and engagement in a number of ways, the method described here can only be applied to PDFs, and therefore is appropriate when electronic dissemination is the preferred method of communicating information or results. Considering the capacity and needs of the target audience is critical to determine if this approach is an appropriate method. A web-based, dynamic approach may be better suited to meet the needs of certain audiences or projects (e.g., when data is frequently changing). Also, evaluators should consider the digital literacy of the intended audience to determine their familiarity and level of comfort with viewing PDFs.

There are a few technological limitations that need to be considered when applying this method of adding interactivity. With the wide variety of mobile devices (e.g., smart phones, tablets) now available, there are an increasing number and variety of mobile applications, or apps, for reading PDFs on mobile devices. Many of the PDF reader apps are not currently designed to view interactive features of PDFs. The authors overcame this challenge by including instructions within the PDFs (e.g., on the first page of a report) indicating that the interactive features are best viewed using Adobe Acrobat on a personal computer. The free version of Adobe Acrobat, Adobe Reader, is available for download at ***http://get.adobe.com/reader/***.

Furthermore, using interactivity in this manner has the potential to hide important information and should be used with caution. Unlike other more dynamic, interactive approaches that allow for the reader to see and manipulate variables or data, decisions on how the interactivity will behave and which data or elements will be linked fall into the control of the creator when using this approach. Therefore, alternative types of interactivity should be considered if the primary purpose is to allow the user to manipulate the data.

The approach proposed by the authors requires Adobe Acrobat Pro, Acrobat Standard, or InDesign software. However, a variety of resources and instructions on how to create interactive buttons are readily accessible, reducing the time required to learn the method, even for those less familiar with Adobe products (see Appendix A). The required skill level is low compared to some web-based options, which can require advanced programming and web-design skills. The authors had some familiarity with using Adobe Acrobat and InDesign for creating graphics and report design, but had never used the software to add interactivity. A list of online tutorials is included in Appendix A. Step-by-step instructions for creating the interactivity shown here are included in Appendices B-D.

Conclusions

As evaluators and others continue to expand their use of data visualizations and more concise evaluation reports and continue to look for additional ways to communicate findings to diverse audiences throughout the evaluation cycle, adding simple interactivity to PDFs may help enhance evaluation practice, improve understanding of data and findings, and promote engagement among key stakeholders. This method is a viable and accessible approach for many evaluators, since PDFs are commonly used for sharing via email and posting to websites and/or blogs. PDFs could also be referenced during in-person presentations. As evaluators continue to respond to the demand for data and concise, graphically-based reports, the approach discussed here is another practical tool to aid in that process.

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Appendix A

Free Resources

Free instructions for creating interactive buttons, hyperlinks, and cross-references are available from Adobe for InDesign, Acrobat Pro, and Acrobat Standard at the following links:

InDesign

- Adobe Help: Create Buttons available at ***http://bit.ly/buttons_indesign***.
- Video: Create an Interactive PDF available at ***http://bit.ly/video_indesign***.
- Adobe Help: Create Hyperlinks available at ***http://bit.ly/links_indesign***.
- Adobe Help: Create Cross-references available at ***http://bit.ly/crossreferences_indesign***.

Acrobat Pro

- Adobe Help: Create Buttons available at ***http://bit.ly/buttons_acrobat***.
- Adobe Help: Create a Link available at ***http://bit.ly/links_acrobat***.
- Video: Adding Interactivity to PDF Files available at ***http://bit.ly/video_acrobat***.

Acrobat Standard

- Adobe Help: Create Buttons available at ***http://bit.ly/buttons_standard***.
- Adobe Help: Create a Link available at ***http://bit.ly/links_standard***.

Appendix B

How to Create Pop-up Boxes

To create interactive pop-up boxes, the creator adds a button and pop-up box to an existing visualization or other element in an evaluation product. The creator assigns the button to perform the action Show/Hide Buttons and Forms and chooses the pop-up box as the object that appears. The steps below were developed by the authors to create pop-up boxes using Adobe InDesign.

1. Create an initial visualization in InDesign, or paste in a graphic created elsewhere (e.g., Adobe Illustrator).
2. Create the pop-up box and its contents. Right-click on the box and select Convert to Button from the Interactive menu. A new window will open with choices to customize the button. Name the button something easy to remember (e.g., Pop-up box).
3. Check the box next to Hidden until Triggered.
4. Uncheck the box next to Printable.
5. Decide what to use as the button that the user will interact with to activate the pop-up box. Any editable object can be become a button. For example, if the visualization was created in Adobe Illustrator or InDesign, part of the visualization can be converted to a button (e.g., one bar of a graph). An information icon or other object can also be added to any visualization or document and converted to a button.
6. Right-click this object and select Convert to Button from the Interactive menu. Name the button something easy to remember (e.g., Information Icon).
7. A new window will open with choices to customize the button action. First, choose how the user will interact with the button. Select the desired Event from the drop down menu (i.e., selecting On Click will cause the button to activate when the user clicks on the button).
8. Next, click the plus sign next to Actions and choose Show/Hide Buttons and Forms.
9. From the list that appears next to Visibility, click the check box next to the item created in step 2 (e.g., Pop-up box). An image of an eye will appear. This indicates that the pop-up box will appear when the user performs the event selected above (i.e., clicks on the button).
10. Repeat steps 7-9 to add interactivity when the user stops interacting with the button. For example, to set an action for what happens when a user no longer clicks on the button, select On Release or Tap from the drop down menu in step 7. In step 9, click the check box next to the item created in step 2 until an image appears of an eye with a red line through it. This indicates the pop-up box will no longer be visible when the user stops interacting with the button.

Appendix C

How to Show or Hide Parts of a Visualization

To show or hide parts of a visualization, the creator converts part of the visualization to a button that reveals or hides other elements. The creator assigns the button to perform the action Show/Hide Buttons and Forms and assigns the parts of the visualization that should be revealed/hidden. The steps below were developed by the authors to show or hide parts of a visualization using Adobe InDesign.

1. Create the initial visualization in InDesign or paste in a visualization created in Adobe Illustrator.
2. Decide what elements of the visualization to show and hide (e.g., specific data points). Right-click on these objects and select Convert to Button from the Interactive menu. A new window will open with choices to customize the buttons. Give each new button a unique name (e.g, Data Point 1).
3. Decide what to use as the button that the user will interact with to show/hide these elements. Any editable object can be become a button. For example, part of the visualization can be converted to a button (e.g., a variable name). An information icon or other object can also be added to any visualization and converted to a button.
4. Right-click this object and select Convert to Button from the Interactive menu. Name the button something easy to remember (e.g., Variable 1).
5. A new window will open with choices to customize the button action. First, choose how the user will interact with the button. Select the desired Event from the drop down menu (i.e., selecting On Roll Over will cause the button to activate when the user hovers over the button).
6. Next, click the plus sign next to Actions and choose Show/Hide Buttons and Forms.
7. From the list that appears next to Visibility, double-click the check box next each object that you want to be hidden and then revealed by the user (e.g., the objects selected in step 2). An image of an eye with a red line through it will appear. This indicates that the object will be hidden when the user performs the event selected above (i.e., hovers over the button).
8. Repeat steps 5-7 to add interactivity when the user stops interacting with the button. For example, to set an action for what happens when a user no longer hovers over the button, select On Roll Off from the drop down menu in step 5. In step 7, click the check box next to each object one time, so that an image of an eye appears. This indicates the object will re-appear when the user stops interacting with the button.

Appendix D

How to Create Navigation

To create an interactive internal navigation bar, the creator adds buttons to an existing navigation bar and a destination for each button. The creator assigns the button to perform the action Go To Destination and chooses the appropriate destination. The steps below were developed by the authors to create internal navigation buttons using Adobe InDesign.

1. Create an initial navigation bar in InDesign, including all sections you want to be able to navigate to.
2. Create a destination for each section. Highlight the section header, right-click, and select New Hyperlink Destination from the Interactive menu. A new window will open with choices to customize the destination. The name field should pre-populate with the selected text (e.g., Methods).
3. Select the type of destination (e.g., text anchor, page, or URL). A text anchor will navigate to selected text.
4. Click Okay.
5. In the navigation bar, right-click the object (e.g., the square box) for one of the sections and select Convert to Button from the Interactive menu.
6. A new window will open with choices to customize the button action. Name the button something easy to remember (e.g., Methods button).
7. Then, choose how the user will interact with the button. Select the desired Event from the drop down menu (i.e., selecting On Click will cause the button to activate when the user clicks the button).
8. Next, click the plus sign next to Actions and choose Go To Destination.
9. From the options that appear, select the following settings:
    a. For the option next to Document, select the appropriate document.
    b. For the option next to Destination, select the appropriate destination that you created in step 2 (e.g., Methods hyperlink destination).
    c. For the option next to Zoom, select Fit in Window. When you navigate to the section, the new page will zoom to fit in the available window with the applicable section header at the top of the screen.
10. Select Printable at the bottom of the window.
11. Repeat steps 5-10 for each component of the navigation bar.
12. Copy the interactive navigation bar and Paste in Place on each page of the document.
13. On each page, change the appearance of the navigation bar to make the box for the applicable section different from the other section boxes (e.g., use the Color menu in InDesign to darken the tint of the Methods box in the navigation bar on the pages of the Methods section).

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