



Actions II

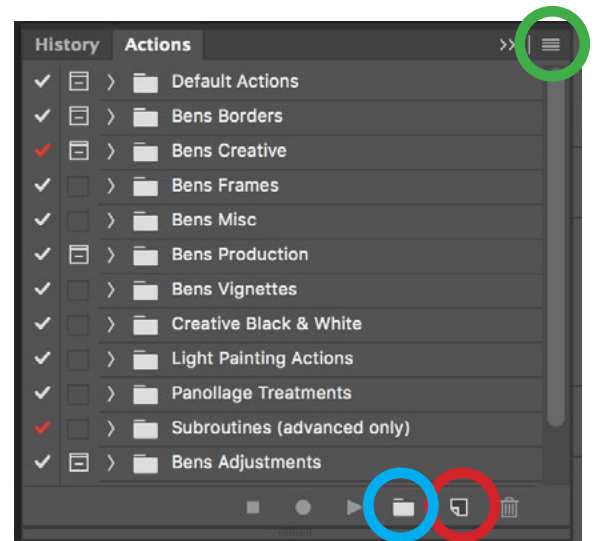
Actions II

This lesson will cover some more intermediate and advanced ideas related to actions. If you are new to actions, I'd recommend that you watch the other Masters Academy video on the topic first.

Loading & Saving Actions

After you've created an action, you'll probably want to save it. Know that you can't save an individual action. If you select the action and then go to the menu in the top right corner of the Actions panel, the Save Actions option will be grayed out (aka unavailable). In order to save an action, it needs to be in a set, or folder. You can create a new folder by clicking on the New Folder/Set icon at the bottom of the Actions panel and you can move actions into a folder simply by dragging them into one. Save an Action Set/Folder by clicking on the set in the Actions panel, clicking on the side menu in the top right corner of the panel and choosing Save Actions. You'll be prompted to choose a location for the actions and if you choose the Actions folder within the Photoshop folder on your hard drive (Applications > Adobe > Photoshop > Presets > Actions), then the actions will automatically appear in the side menu of the Actions panel.

If you save them in a different location, you will need to go to that side menu, choose Load Actions and then navigate to the location on your hard drive. On the Mac, you can double-click on an action file on your hard drive and Photoshop will automatically open and load the action.

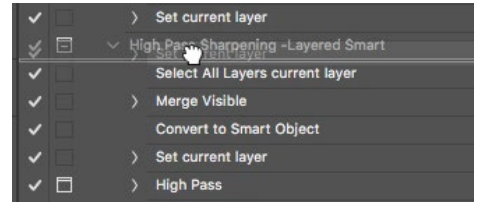


- When we mention the side menu in the Actions panel, we're referring to this icon. Clicking it will offer a variety of options.
- Click this icon to create a New Set (or new folder).
- Click this icon to create a New Action.

Creating copies

Often times, I may create several actions that are all very similar to each other. For example, I may create a set of actions that all apply a tinting effect to an image, where each action will tint the image with a different color. In a case like this, most of the steps for creating those actions will be the same.

If you click and drag on an action in the Actions panel, you will reposition the action. If you hold down the Option key (Alt on Win) as you click and drag, you will drag a copy of the action. The action name will be the same, but it will have the word “copy” at the end. You’ll likely want to rename it to something more useful. The ability to create copies of actions will allow us to create two or more actions that are very similar to each other without having to create each one from scratch. After making a copy, we can expand the copy in the Actions panel and change only the step or steps that we need.



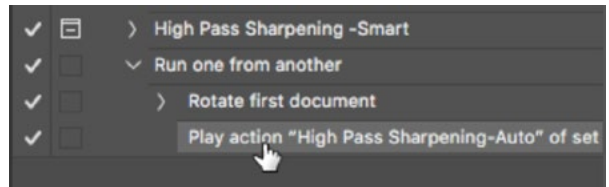
When we move or copy an action or a step within an action, Photoshop will give us feedback (the highlighted horizontal line) that shows us where the action or step will be placed when we release the mouse button.

Note that the same thing can be done for individual steps in an action. If we select the step or steps that we’d like to copy, we can hold down the Option key (Alt on Win) and drag the steps to the action where we’d like to place them.

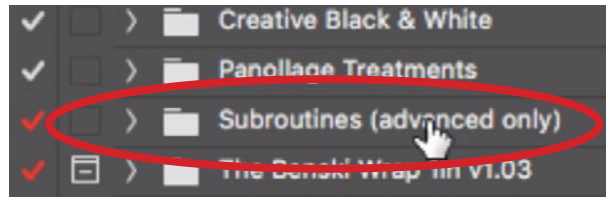
Play an action within an action

Photoshop allows us to play an action within an action. We can use an action step to tell Photoshop to go and play a different action and then return to the current one. To do this, we’ll start creating our action. When we get to the point where we want another action to play within the action we’re creating, we’ll click on the name of that action and hit the Play button.

When including an action as a “subroutine” within another action, know that there are a few things that could mess up the process. If you either delete or rename an action that is included within another action, Photoshop will give you an error when attempting to play the action. It’s going to reference the exact name of the action in order to play it, so if it doesn’t exist, Photoshop will not be able to play it. In order to prevent this from happening, I like to create a folder within my Actions panel that is called Subroutines and this is where I place any actions that I regularly use *within* other actions. This way, I know that I shouldn’t delete or rename them.



In the highlighted action step above, Photoshop is being prompted to run the “High Pass Sharpening-Auto” action.

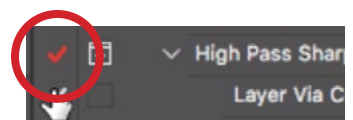


The Subroutines folder is where I will place all of my actions that are included within other actions.

Making changes to actions

I sometimes want to refine an action that I made a long time ago. This is completely doable because you can easily make changes to actions after you’ve created them. To make changes to a step in an action, click on the arrow to the left of the action name in order to expand the steps. Then click on the step where you’d like to add something and click the Record button at the bottom of the Actions panel. You can now do something in Photoshop and the step will be added right after the step that you had activated. Add as many steps as you’d like and then hit the Stop button. Just make sure that you test your action to make sure that it plays correctly.

If you’d like to temporarily deactivate a step in an action, click on the little check box to the left of the step name. Photoshop will know to leave this step out when playing the action. If there is a step that is deactivated within an action, then the name of the action will have a red check mark to

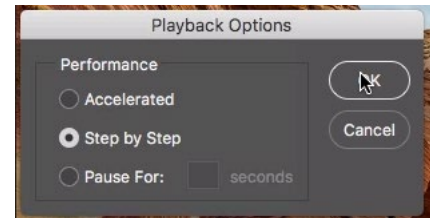


The red check mark indicates that there is a deactivated step within the action.

the left of its name. This is just letting you know that one of the included steps will not play.

Slow down the playback speed of an action

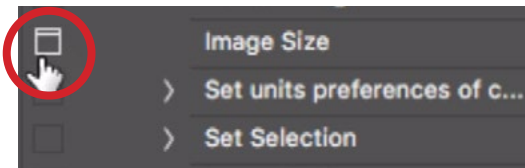
When you play an action, Photoshop will play it as quickly as possible, and it's usually too fast to really see what's going on. If you would like to change that, click on the side menu at the top of the Actions panel and choose Playback Options. A dialog will appear where you can specify your playback speed. By default, it's set to Accelerated. If you'd like to see each step as it's played, choose the Step by Step option. With this setting, Photoshop will play the steps one at a time and it will highlight the steps in the Actions panel so you can see what it's doing. If you choose the Pause For option, you can specify how long Photoshop should pause between each step in the action.



The Playback Options allow you to specify how quickly an action should play.

You can also play each step manually by double-clicking on the name of each step, one by one. Just know that if a step asks you for settings, the settings you apply will be remembered within that step and used the next time you play

the action. For example, if you double-click on a Gaussian Blur step and set the Radius slider to 5, then the next time you play the action, the Radius slider will automatically be set to 5. If there is a little highlighted square to the left of an action step, it means that the step will pause to ask you for settings.



The highlighted square icon indicates that the action will pause at this step and ask for settings.

You'll find that when double-clicking on a step, you will sometimes have settings pop up that wouldn't normally pop up when playing the action. If you don't want this to happen, hold down the Command key (Ctrl on Win) when double-clicking on the step and it will not ask you for settings.

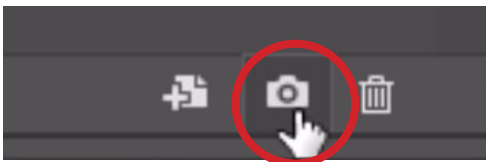
Updating an action

After using an action for a while, I sometimes find that the settings I used when recording the action really weren't ideal. For example, let's say that when recording an action, I used a Gaussian Blur setting of 5, but every time I use the action, I need to change it to 50. There are two ways of updating an action, one of which is double-clicking on the name of a step, changing the settings in the dialog that pops up and then clicking OK. Alternatively, you could click on the name of the action, then click on the side menu at the top of the Actions panel and choose Record Again. This will play back the action, paying attention to the settings used. It will stop at each dialog so you can enter in new settings and click OK.

Complex actions and History states

Complex actions can tend to have many, many steps. Know that Photoshop only records a certain number of steps in its History. This means that if the action uses more steps than Photoshop will remember, you won't have enough "undos" to get the document back to the state it was in before playing the action.

To specify how much history Photoshop should remember, go to the Photoshop menu and choose Preferences > Performance. (In Windows, the Preferences are often found under the Edit menu.) Here, you can specify the number of History States. This is how many undos you will have.



The Snapshot icon at the bottom of the History panel.

If an action contains too many steps for Photoshop to remember in its History panel, I will click on the little camera icon at the bottom of the History panel before playing an action. This will create a Snapshot, which is a saved version of the document that appears at the top of the History panel.

If you hold down the Option key (Alt on Win) while clicking on the camera icon, you'll be prompted to give the Snapshot a name. If you record this process *within* the action, a Snapshot will automatically be cre-

ated when you play the action. You can also include a Snapshot at the end of an action. If you do this, you can later go to the top of the History panel and click on the Snapshot that will change your document to the state it was in before the action was played and then you can click on the snapshot that will change your document to the state it was in after the action was played.

Avoid trouble when creating actions

Sometimes, an action might play well on the image you use to create it, but you get an error when you go to play it on another image. Let's look at what could go wrong and learn how to avoid it.

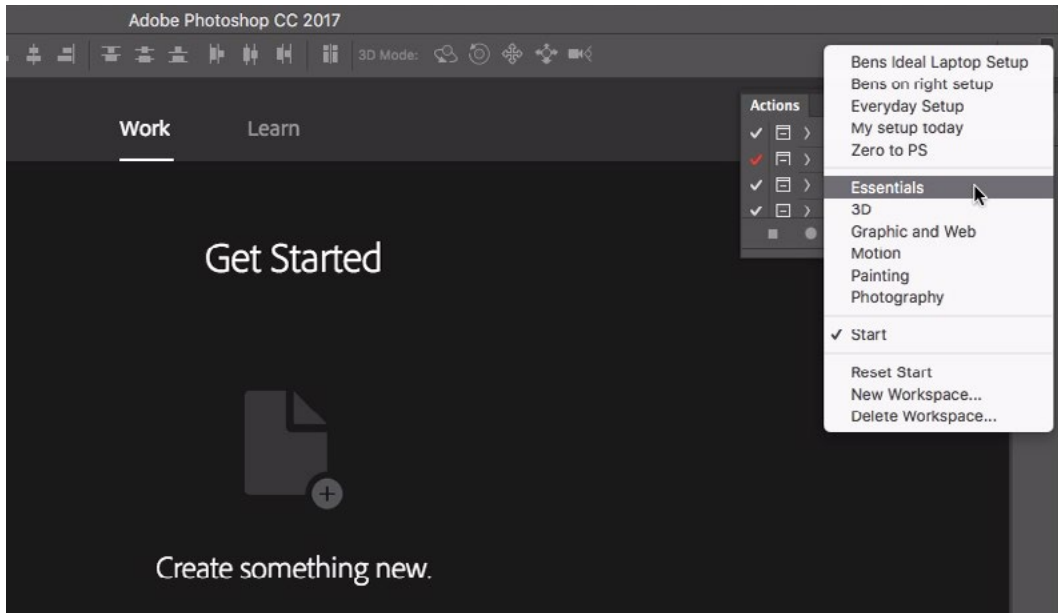
Foreground/background colors Some filters rely on the foreground and background colors, which can be found at the bottom of the Tool Bar on the left side of the interface. If you had your foreground and background colors set to black and white while creating the action and then played the action when they were set to different colors, you will get a very different result. If you know you'll be using a filter that relies on the foreground and/or background colors, set those colors right after you start recording. This way, the step will be incorporated into your action and the filter will always create the same result.



The foreground and background swatches can be found at the bottom of the Tool Bar.

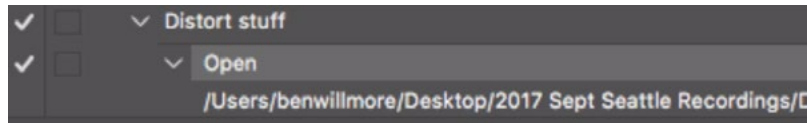
The Brush Tool in an action You can use the Brush Tool within an action, but it won't automatically know your brush size unless you include that setting as a step in your action. After you start recording the action, set your brush size. Then, Photoshop will know to use the same brush size every time the action is played.

Opening an image within an action If you want to start creating an action when you have no open Photoshop documents, your Actions panel may not be visible. To access the Actions panel, you can either go to the Window menu and choose Actions, or you can choose a workspace from the menu on the right side of the Options Bar.

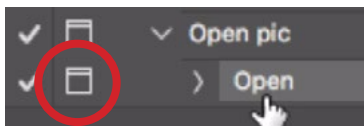


If you have no documents open in Photoshop, you can access your panels by choosing a workspace from the menu on the right side of the Options Bar. Here, I'm choosing the Essentials workspace.

You can include your “open document” step as part of your action. Just hit the Record button and then open your desired image. Be aware, however, that Photoshop will record that step using the exact image you opened. When you play the image back, it will navigate to the image you specified and open it as part of the action. This could cause a few issues down the line. If you delete, move or rename this image, Photoshop may present an error when it gets to the open image step.



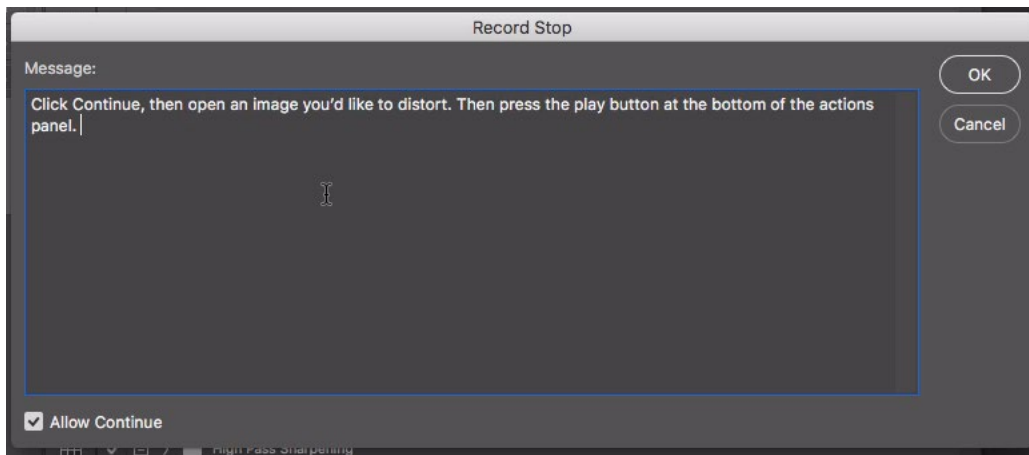
Here, we opened an image while recording an action. You can see that the step includes the exact location of the action on my hard drive.



We clicked the square icon to the left of the Open step. This tells the action to pause and prompt the user to choose an image.

When you include the “open” step in your action, you’ll probably want the user to be able to specify which image is opened at this stage. You can achieve that by clicking the little gray square to the left of the Open step in the Actions panel. This will prompt the user to navigate the hard drive to the file they’d like to use. You can also add some instructions, known as a stop, to tell the user what to do. You can insert a stop by first clicking on the step

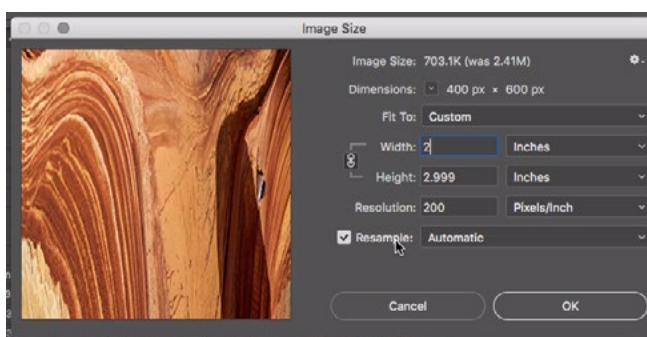
in the action that you'd like the stop to appear after and then going to the side menu at the top of the Actions panel and choosing Insert Stop. A dialog box will appear, inside of which you can type in the instructions, turn on the "Allow Continue" check box and then click OK.



Here, we are re-recording a stop in the action, which is simply a set of instructions for the user.

The Save command is also something you need to be careful of when including it within an action. When you use the Save command within your action, the action records what file format you chose along with the settings relating to it as well as the location you used. Because of this, if I include the Save command, I will also turn on the gray square next to the Save step so that Photoshop prompts the user to choose the save location and settings.

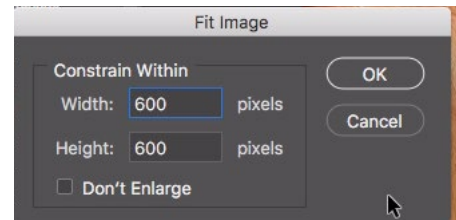
Resizing a picture with an action Whenever you resize an image within an action, you need to be aware of how it's going to be recording things. When you use the



If you use the Image Size dialog within an action, be sure to change all the settings you want to be included in the action.

Image Size command within an action, the action will only record the setting you changed. For example, if you only changed the width of your document, the width is the only information that will be recorded in the action. If the other information (like resolution) is important to you, make sure that you change the settings for that other info when creating the action.

Sometimes, you'll run into issues when using both vertical and horizontal images. You may want the action to resize an image so the longest dimension is a particular size. A simple Image Size command won't work because the dimensions will be different depending on whether your image is vertical or horizontal. Instead, while recording the action, I will go to the File menu and choose Automate > Fit Image. In the Fit Image dialog, you will be able to enter in pixel dimensions, but instead of resizing to the specific dimensions you choose, it will simply ensure that the image does not become larger than the dimensions you entered. I will usually enter in the same number for the width and height. Whichever of those dimensions is longer will be the length I specified. The other dimension will scale accordingly. For example, if I set the Width and Height to 600 pixels and then run the command on an image that is 800 pixels wide and 400 pixels tall, then the image will scale to 600 pixels wide by 300 pixels tall.



The Fit Image command will not allow the dimensions of your image to be larger than the size you specify.

Working with layers in actions

When creating actions, you'll sometimes have to think differently when working with layers. If you click on a layer in the Layers panel while recording an action, it's going to record the name of that layer as part of the action. This could create problems because your layer names will be different in every document. To get around this, you can change which layer you are working on by using your keyboard. This will record the action by telling Photoshop to grab the layer that's above (or below) instead of grabbing a layer according to its name.

Use the following shortcuts to select the layers above and below:

Select the layer above: Option+] on Mac, Alt+] on Win

Select the layer below: Option + [on Mac, Alt + [on Win

To select more than one layer: Use the shortcuts above, but include the Shift key.

Use the following shortcuts to move the active layer up or down in the layer stack:

Move a layer up in the layer stack: Command +] on Mac, Ctrl +] on Win

Move a layer down in the layer stack: Command + [on Mac, Ctrl + [on Win

Move a layer to the top of layer stack: Shift + Command +] on Mac,
Shift + Ctrl +] on Win

Move a layer to the bottom of the layer stack: Shift + Command + [on Mac
Shift + Ctrl + [on Win

Move between documents using keyboard shortcuts

If you need to move between open Photoshop documents within your action, you can do so using only keyboard shortcuts:

Move to the next Photoshop document (the tab to the right): Ctrl+Tab

Move to the left in the Photoshop tabs: Shift+Ctrl+Tab

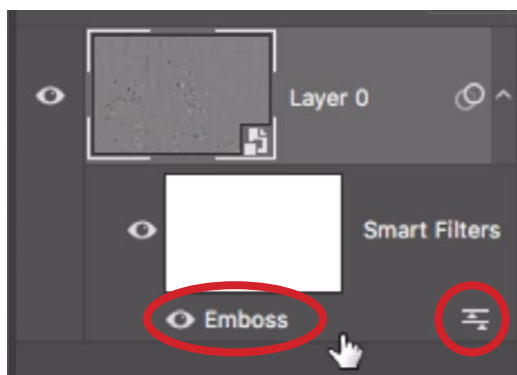
Actions with smart objects and filters

When you apply a filter to a layer that has been converted into a smart object, it will be applied as a smart filter. Smart filters are great because the settings can be changed later (even if you close the document and open it again later). When including a smart filter within an action, put some thought into the order in which you apply each step. If you're creating an effect that involves using a filter set to a certain blending mode, it will be useful to change the blending mode first so that when you are working with the filter settings, you are seeing what the results will look like at the end. For example, when you apply the Emboss filter, the preview will be 50% gray unless the blending mode has already been changed to Hard Light. If the blending mode has been changed, you'll be seeing the actual result and not the gray preview. For this reason, I would change the blending mode be-

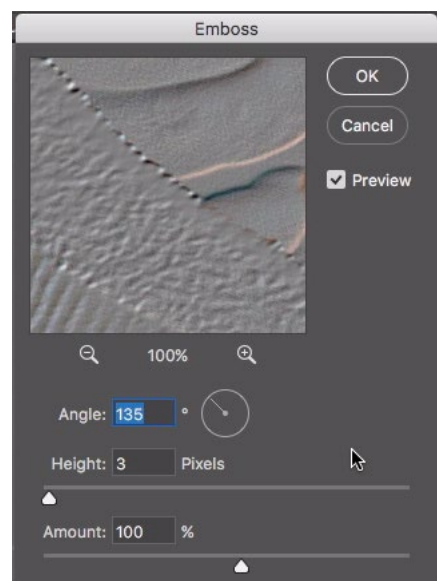
fore applying the filter settings, so when the action plays back, the blending mode will already be changed when the action prompts the user for filter settings.

With the above information in mind, here is how I would create an action for applying the Emboss filter to an image:

I'll click the New action button at the bottom of the Actions panel, name the action "Emboss as Smart Object" and click Record. I'll then convert the image layer into a smart object by going to the Filter menu and choosing Convert for Smart Filters. Then, I'll go back to the Filter menu and choose Stylize > Emboss. It doesn't matter what settings are used here because we're going to come back and change them later so I'll just click OK to close the Emboss dialog. Next, I'll double-click on the little slider icon to the right of the Emboss filter in the Layers panel. Filter options will appear and I will change the blending mode menu



Clicking on the slider icon to the right of the Emboss filter name will bring up the general filter settings, which includes blending mode. Clicking on the name of the filter (Emboss) will bring up the settings specific to that filter.



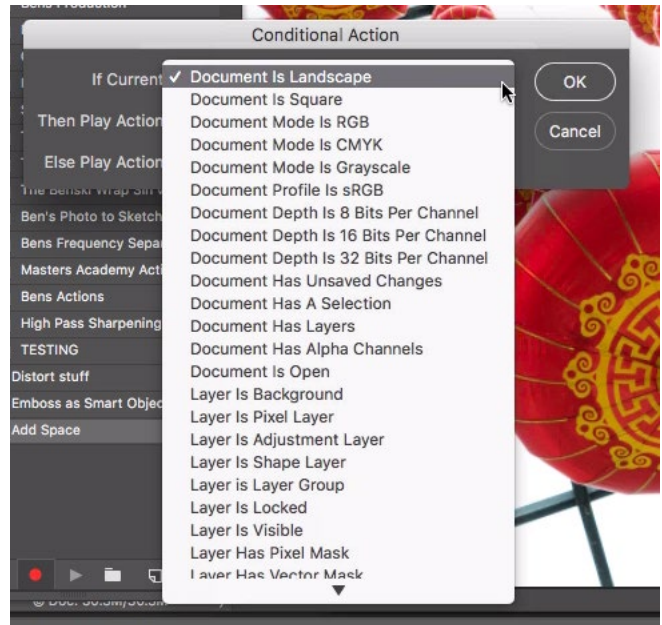
The settings for the Emboss filter. If the bending mode has not already been changed, we see this gray preview.

at the top of the dialog to Hard Light and then click OK. Then I will click on the word Emboss in the Layers panel and the Emboss settings will appear. I'll adjust the sliders and then click OK. I'll click the Stop button at the bottom of the Actions panel to stop recording. Finally, I will click on the gray square to the left of the last step in the action so that Photoshop will pause at this stage and prompt the user to specify the settings for the Emboss filter.

Conditionals in Actions

When you include a conditional within an action, it will ask a question about the picture and proceed with the action based on the answer. When you use conditionals, you will be prompting Photoshop to play an action within an action. You can add a conditional by clicking on the side menu at the top of the Actions panel and choosing Insert Conditional.

The “If Current” menu at the top of the Conditional Action dialog will list several conditions that may apply to your document. For example, if the current document is in landscape orientation, if the current document has layers, if the current layer has effects, etc. The next two menus will allow you to tell Photoshop what to do based on the answer to the question asked in the top menu. If the answer is yes, Photoshop will proceed by playing the action you specify in the “Then Play Action” menu. If the answer is no, then Photoshop will proceed by playing the action you specify in the “Else Play Action” menu.



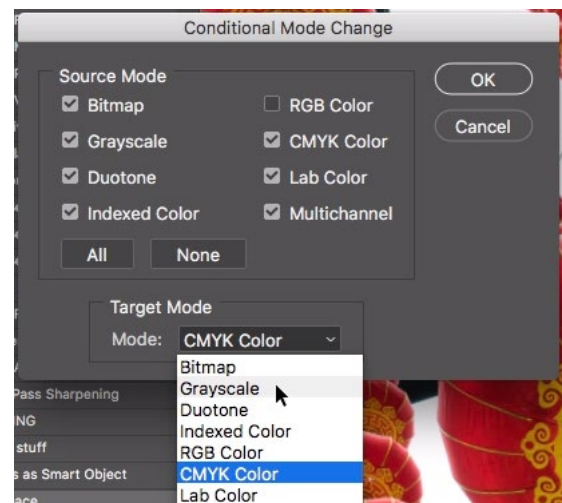
The Conditional Action dialog. The “If Current” menu lists all the conditions we can work with.

Let’s look at how I would use conditionals to create a complex action. I want to create an action that will add my copyright in one location for a horizontal image, in another location for a vertical image and in yet another location for a square image. To do this, I will first need separate actions for inserting the copyright in those different locations. Then, I will start recording my “master” action (the one that I’ll actually run to add copyright watermarks). I will first create a conditional that asks whether the document is square. In the Conditional Action dialog, I will set the “If Current” menu to “Document is Square” and then I will set the “Then

Play Action” menu to play the action that will put the copyright in the location I desire for square images. I will leave the “Else Play Action” menu set to None and then click OK. Then I will create another conditional, with the “If Current” menu set to “Document is Landscape.” I will set the “Then Play Action” menu to the action that places the copyright in the location I desire for landscape images. I will set the “Else Play Action” to the action that places the copyright in the location I desire for portrait/vertical images. I’ll then click OK and stop recording the action.

Conditionals and color modes You can use a conditional to ensure that your finished document is a particular color mode, sRGB for instance. To do this, you would first create an action that converts a document to sRGB. Then you would create the action you want and include a conditional that specifies the following: If the current document profile is sRGB, do nothing. If the current document is NOT sRGB, then run the action that converts the document to sRGB.

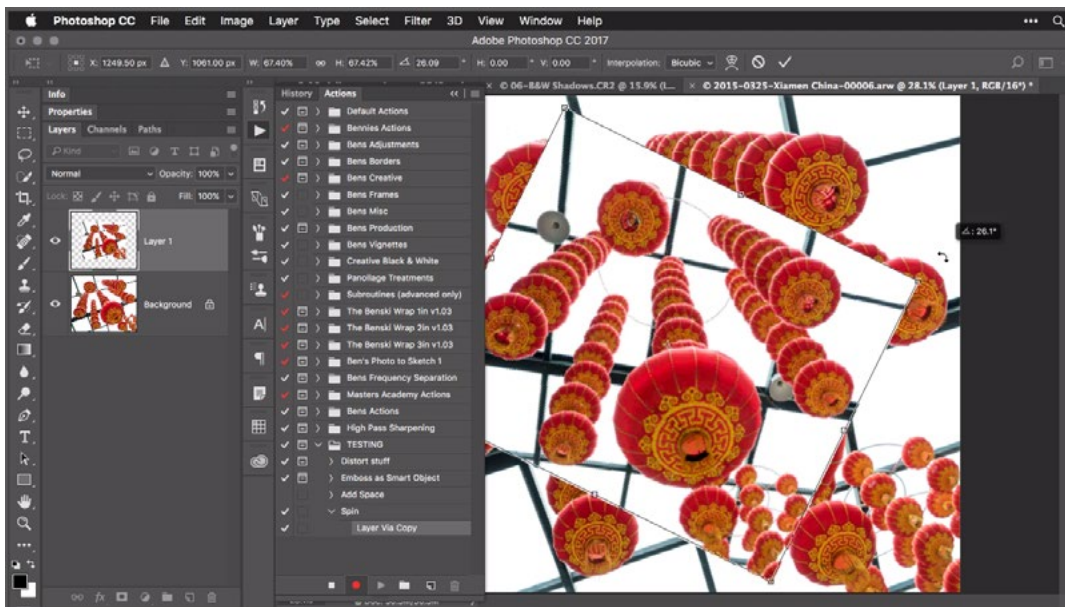
Conditional Mode Change There is another command that you can run within your action that will tell Photoshop to make sure the document is a specific color mode. You can access this command by going to the main menu and choosing File > Automate > Conditional Mode Change. In the dialog, the command will look at which color modes you have checked off and tell Photoshop that if the document is in one of those modes, then it should convert the document to the mode you specify in the “Target Mode” menu at the bottom of the dialog.



The Conditional Mode Change dialog.

Changing a “subroutine” action for dramatically different results

We’re going to have one action play another action over and over again. This will allow us to change just one step in the action that is being repeated in order to get a dramatically different result. To start, we’ll click the New Action icon, name the action Spin and hit the record button. We’ll then duplicate the active layer by typing Command+J (Ctrl+J on Win) and we’ll scale and rotate the duplicate with the Free Transform command. We’ll go to the Edit menu and choose Free Transform. Then, we’ll scale the layer down a bit and rotate it about 35 degrees clockwise. We’ll hit Return/Enter to lock in the transformation and then we’ll hit the Stop button at the bottom of the Actions panel.

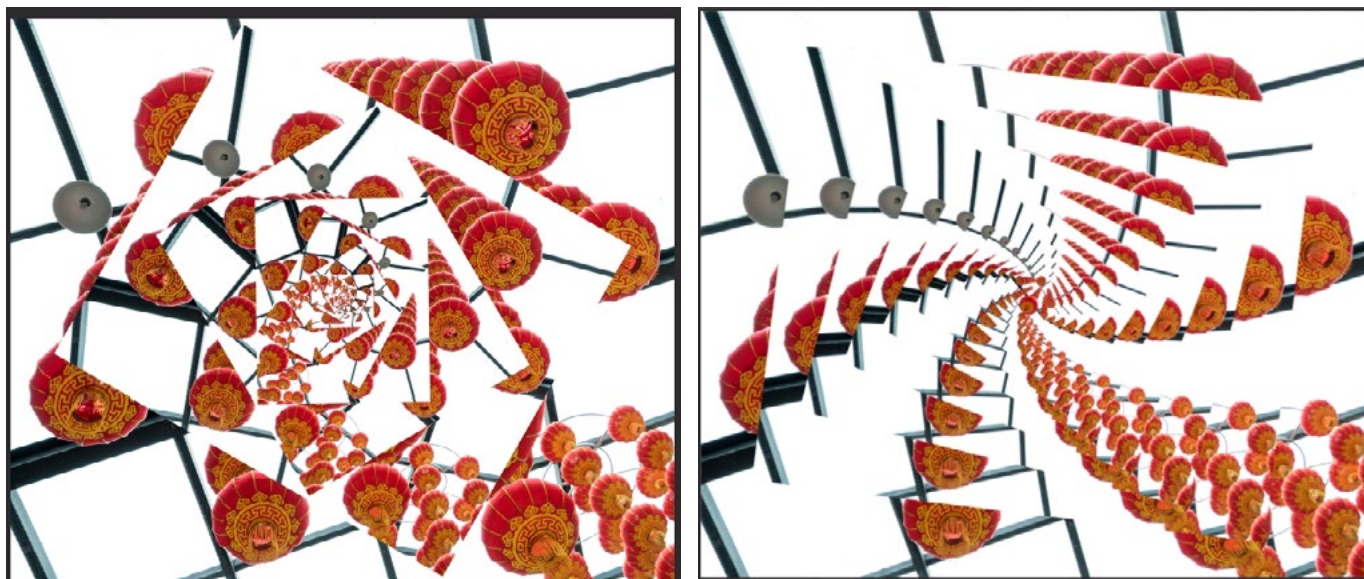


Here, a simple action is being created that will scale and rotate the duplicate of our background image. The Free Transform command is being used to do that.

Next, we’re going to create a new action that will apply the Spin action over and over again. We’ll click the New Action icon, name the action Spin x10 and then hit the Record button. Then we’ll click on the Spin action in the Actions panel and hit the Play button. We’ll repeat this process of clicking the Spin action and then hitting the Play button nine more times. Then, we’ll hit the Stop button to stop recording the action.

Now, we can make a change to the Spin action and, when we play back the Spin x10 action, it will create a different result. Double-clicking on a step will play the

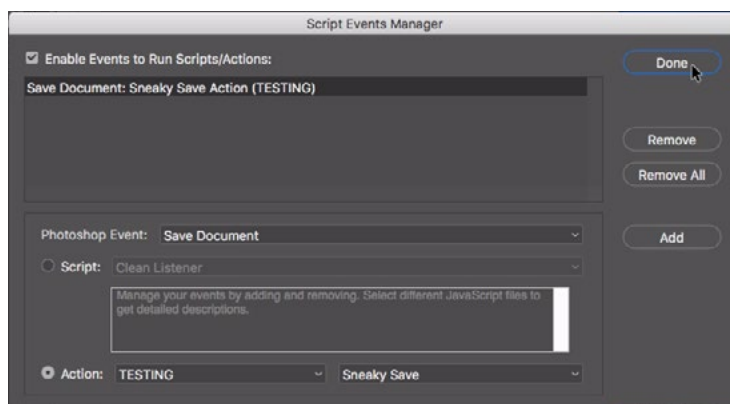
step back AND allow you to change the settings, so that's what we'll do with the Transform step in the Spin action. We'll double-click on the "Transform Current Layer" step, adjust the size and rotation and then hit the Enter/Return key to lock in the transformation. This will update the settings contained in that step. Now, when we play back the Spin x10 action, it will produce a very different result.



The result we achieved after running the Spin x10 action the first time is shown on the left. We then changed the Spin action and played the Spin x10 action again to achieve the results shown on the right.

The Scripts Events Manager

There is a way to trigger an action to play every time you launch Photoshop or every time you open an image. We'll go to the File menu and choose Scripts > Script Events Manager. In the dialog that appears, we'll first make sure that the "Enable Events to Run Scripts/Actions" check box is turned on. Then we'll



The Scripts Event Manager dialog.

use the Photoshop Event menu to determine what should trigger the action to play. You can choose things like Start Application (open Photoshop), New Document, Save Document, etc. Then we'll use the Action menus at the bottom of the dialog to specify which action should play. We also need to make sure that we click the Add button on the right side of the dialog so that the "event" shows up in the list. Then we can click the Done button.